RAISING THE VALUE OF SALES

Specification

Level 5

Sales and Sales Management Qualifications

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Version 6

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 .

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Section 1 General information

1.1 Introduction

This booklet is to inform ISM learners and centres about the delivery and assessment of the ISM Level 5 qualifications on the Regulated Qualifications Framework (RQF). The latest version of this document will always be posted on the ISM website at www.ismprofessional.com/education . 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

1.2 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

1.3 Who are the qualifications aimed at?

The level 5 qualifications have been approved for use with the following age group:

- 19+

Level 5 qualifications are Vocationally Related Qualifications designed for established or aspiring sales managers, account managers, regional sales managers or regional/key account managers.

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.

1.4 Qualification definitions

All qualifications on the Regulated Qualification Framework (RQF) have a 'size' which is expressed in terms of total qualification time (TQT). TQT is a guide for the total amount of time measured in hours that a typical learner would need to be able to evidence the level of achievement necessary for the award of a qualification.

There are three sizes of qualifications: Awards, Certificates and Diplomas. These are determined by the TQT required to achieve the qualification.

An Award has a TQT of between 10 and 120 hours, a Certificate has a TQT of between 130 and 360 hours and a Diploma has a TQT of 370 hours or more.

The terms Award, Certificate and Diploma do not describe qualification levels. It is possible to have an Award at level 5, for example, and a Diploma at level 3.

This specification details the ISM's qualifications at level 5. Other specifications are available for other levels.

1.5 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.

1.6 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.

1.7 Grading

Each unit and each qualification are 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.

1.8 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 classroom or through e-learning.

1.9 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.

1.10 Indicative content

In addition to the Learning Outcomes and Assessment Criteria, the ISM qualifications are provided with extensive indicative content advice. The indicative content is provided to guide tutors towards the appropriate topics, theories and models to be covered. However, variation can be made within this advice to suit the needs of both teachers and learners. Tutors should choose from a range of theories and models. Qualifications can only be updated periodically so it is expected that tutors will adapt the content to present the most up to date theory and examples. For example, promotional tools such as social media are being updated constantly and the teaching should reflect this. It is also acceptable to adapt teaching to suit local conditions. For example, to reflect the local legal system.

This content is not prescriptive but is intended to provide helpful guidance to teachers and learners relating to the kinds of evidence that should be provided for each assessment objective to enable the learner to achieve the unit.

In summary, provided the Learning Outcomes and Assessment Criteria are covered, the indicative content can be adapted to reflect current thinking and local conditions.

1.11 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. Learners can progress to ISM level 6 qualifications or similar level 6 qualifications with sales and marketing content. A number of single-unit level 5 Awards can be built up over time to progress to the level 5 Certificate in Sales and Account Management or the larger level 5 Diploma in Sales and Account Management.

1.12 Language

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

1.13 Level descriptor

This qualification has been designed to suit learners working towards a level 5 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 RQF 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

1.14 Qualification overview

There are 13 ISM qualifications available at this level: 11 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/or Diploma. One unit within the Certificate and Diploma is a level 4 unit and is also available as a standalone level 4 qualification. Please refer to the level 4 specification if you wish to offer it as a standalone qualification.

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 5 Award in Understanding and developing customer accounts	A501	600/1405/2	8
Level 5 Award in Understanding the integrated functions of sales and marketing	A502	600/1406/4	8
Level 5 Award in Sales forecasts and target setting	A503	600/1407/6	6
Level 5 Award in Leading a team	A504	600/1408/8	6
Level 5 Award in Motivation and compensation for sales teams	A505	600/1409/X	6
Level 5 Award in Coaching and mentoring	A506	600/1410/6	6
Level 5 Award in Designing, planning and managing sales territories	A507	600/1411/8	6
Level 5 Award in Analysing the financial potential and performance of customer accounts	A508	600/1412/X	6
Level 5 Award in Relationship management for account managers	A509	600/1413/1	6

Level 5 Award in Bid and tender management for account managers	A510	600/1414/3	6
Level 5 Award in Developing a product portfolio	A511	600/1319/9	6
Level 5 Certificate in Sales and Account Management	C501	600/1322/9	26
Level 5 Diploma in Sales and Account Management	D501	600/1324/2	44

1.15 Unit overview

The following units are offered within single-unit Awards and within the Certificate and Diploma.

Unit title	Unit level	ISM unit number	RQF unit reference number	Credit	Assessment method(s)
Managing responsible selling (level 4)	4	U401	D/502/9735	4	Work based evidence or assignment
Understanding and developing customer accounts	5	U501	J/503/0605	8	Work based evidence or assignment
Understanding the integrated functions of sales and marketing	5	U502	L/503/0606	8	Work based evidence or assignment
Sales forecasts and target setting	5	U503	Y/503/0608	6	Work based evidence or assignment
Leading a team	5	U504	D/503/0609	6	Work based evidence or assignment
Motivation and compensation for sales teams	5	U505	R/503/0610	6	Work based evidence or assignment
Coaching and mentoring	5	U506	Y/503/0611	6	Work based evidence or assignment
Designing, planning and managing sales territories	5	U507	D/503/0612	6	Work based evidence or assignment
Analysing the financial potential and performance of customer accounts	5	U508	H/503/0613	6	Work based evidence or assignment

Relationship management for account managers	5	U509	M/503/0615	6	Work based evidence or assignment
Bid and tender management for account managers	5	U510	A/503/0617	6	Work based evidence or assignment
Developing a product portfolio	5	U511	T/503/0616	6	Work based evidence or assignment

1.16 Rules of combination for composite qualifications

Unit combinations for qualifications consisting of more than one unit at this level are listed below.

The **Certificate in Sales and Account Management** consists of a combination of units. To achieve the Certificate, learners must complete each of the mandatory units U401, U501, U502 and U503, totalling 26 credits.

Level 5 Certificate in Sales and Account Management

Unit code	Unit title	Mandatory/ Optional	Assessment	Credit
U401	Managing responsible selling (level 4)	Mandatory	Work based evidence or assignment	4
U501	Understanding and developing customer accounts	Mandatory	Work based evidence or assignment	8
U502	Understanding the integrated functions of sales and marketing	Mandatory	Work based evidence or assignment	8
U503	Sales forecasts and target setting	Mandatory	Work based evidence or assignment	6

The **Diploma in Sales and Account Management** consists of a combination of units. To achieve the Diploma, learners must complete each of the mandatory units **U401, U501 and U502**, giving 20 credits, plus any **four** of the optional units worth another 24 credits, totalling 44 credits.

We recommend Sales Managers select from optional units: U503, U504, U505, U506, U507

We recommend Account Managers select from optional units: U503, U508, U509, U510

Level 5 Diploma in Sales and Account Management

Unit code	Unit title	Mandatory/ Optional	Assessment	Credit
U401	Managing responsible selling (level 4)	Mandatory	Work based evidence or assignment	4

U501	Understanding and developing customer accounts	Mandatory	Work based evidence or assignment	8
U502	Understanding the integrated functions of sales and marketing	Mandatory	Work based evidence or assignment	8
U503	Sales forecasts and target setting	Optional	Work based evidence or assignment	6
U504	Leading a team	Optional	Work based evidence or assignment	6
U505	Motivation and compensation for sales teams	Optional	Work based evidence or assignment	6
U506	Coaching and mentoring	Optional	Work based evidence or assignment	6
U507	Designing, planning and managing sales territories	Optional	Work based evidence or assignment	6
U508	Analysing the financial potential and performance of customer accounts	Optional	Work based evidence or assignment	6
U509	Relationship management for account managers	Optional	Work based evidence or assignment	6
U510	Bid and tender management for account managers	Optional	Work based evidence or assignment	6
U511	Developing a product portfolio	Optional	Work based evidence or assignment	6

1.17 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 or phone 020 3167 4791.

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. 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 fulfil 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 pharmaceutical's 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

1.18 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.

1.19 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 on request please the email education@ismprofessional.com.

1.20 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. It is updated annually, and the latest version is available from education@ismprofessional.com

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.

1.21 Equality of opportunity

We endeavour, in setting the structure and content of our qualifications, and in our 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

Section 2 Units

Unit U401: Managing responsible selling

Unit aim	This unit aims to cover the knowledge involved in managing an organisation's operations in ways that are consistent with its social and ethical principles, and which fulfil legal and regulatory requirements. For the purposes of this unit, 'organisation' can mean a self-contained entity such as a private sector company, a charity or a local authority, or a significant operating unit, with a relative degree of autonomy, within a larger organisation.				
Level	4	ISM Unit no.	U401	RQF unit reference no.	D/502/9735
Credit Value	4	TQT	40	Guided Learning Hours	35
Mapping to National Occupational Standards	Sales NOS 7.7, 7.8				

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Know legal, regulatory, ethical and social requirements pertaining to the sales function	1.1. Explain sales-related legal and regulatory requirements and Codes of Practice	Detail of relevant requirements in your sector and data protection (GDPR) requirements
	1.2. Understand the principles of contract law and the penalties for misrepresentation	Offer and acceptance, intent, consideration, capacity, form of contract and legality.
	1.3. Analyse the potential impact of social and ethical concerns relating to the sales function	Highlighting the importance of trust and credibility; treating customers fairly and with respect.
	1.4. Explain how processes and	Explanation of necessity for all personnel to know, understand

	policies in the organisation meet ethical and social requirements and comply with legal and regulatory requirements.	and follow policies and procedures including information about how these comply with legal and regulatory requirements.
2. Understand how to manage the sales function in a way that complies with legislation	2.1 Describe how to ensure that sales employees have a clear understanding of the organisation's legal, regulatory, ethical and social policies and procedures and the importance of putting them into practice 2.2 Explain how to monitor the way that legal, regulatory, ethical and social policies and procedures are put into practice 2.3 Describe how to provide support to the sales team in putting legal, regulatory, ethical and social policies and procedures into practice	Outline of potential internal communication channels which can be used within a company to ensure information about policies and procedures are known and understood. Induction, training codes of conduct Ensure guidelines are being complied with. Reviews, spot checks, customer surveys, pre-activity approvals, line manager feedback, continuous monitoring, customer access to company code of conduct Easily accessible, practical tailored so relevant to their workplace, in house champion, management support, culture

3. Know how to deal with noncompliance	3.1 Explain how to identify and correct any failures to meet the legal and regulatory requirements 3.2 Explain how and when to provide full reports about any failures to meet requirements to senior management 3.3 Explain how to monitor and manage complaints regarding legal, regulatory, ethical and social requirements	Monitoring reports, analyse reasons for non- conformance, measures to encourage compliance, non-conformance penalties Senior management are ultimately responsible, under their corporate governance responsibilities, for the legal and ethical actions of their staff and need to be informed immediately of any notable non-compliance Company complaints and whistleblowing policies, Risks an Issues logs and contingency plans

Unit U501: Understanding and developing customer accounts

Unit aim	The aim of this unit is to support knowledge, understanding and skills necessary to establish how customer organisations select suppliers as part of their supply chain and to use information gathered on how organisations select suppliers to develop a customer accounts plan. When involved in winning customer business we must know how organisations select their suppliers and be able to maximise opportunities for becoming members of the supplier chain by achieving preferred supplier status.				
Level	5	ISM Unit no.	U501	RQF unit reference no.	J/503/0605
Credit Value	8	TQT	80	Guided Learning Hours	40
Mapping to National Occupational Standards	Sales NOS 9.3, 9.5				

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content
1. Understand buying practices of customers	1.1 Evaluate the organisational and personal influences of the Decision-Making Unit on buying practices	Interpret the internal and external factors that influence the buying process. The numbers in the DMU, their roles and influences, the internal culture and existing buying processes. Externally how to use PESTLE analysis -influence on the wider environment and how that affects buying practises.

	1.2 Evaluate choice criteria of customers and how such criteria affect sales	Exploration of the customers approach to exhaustive, limited or routine problems and how they go about solving them.
	1.3 Review the concept of 'preferred supplier' status	Benefits to buyer organisation of preferred suppliers. Identification of and selection processes used. CAF (Customer Attractiveness Factors)
	1.4 Identify buying practices used by organisations	Trends in buying practices and implications for supplier organisations.
	1.5 Evaluate measures of quality relating to buying and accredited quality programmes	Recognised programmes for quality standards reviewed such as ISO9001 and applications to sales and purchasing.
	1.6 Identify capability and capacity assessments customers undertake on potential suppliers	Items such as sufficient resources, qualified people, financial stability, service commitment, delivery and quality, policies in relation to the environment and waste, staff development and overall corporate social responsibility

2. Understand customer support issues	2.1 Evaluate how organisations develop product or service specifications for buying purposes	Customer centric, legal compliance. Detail, clarity, meet the requirements of different buyer stakeholders
	2.2 Evaluate how the technical and resource support provided by own organisation adds value for the customer	Customer service and value, it brings. When, why, how and who to include from your own team to provide the necessary technical and other support in the sales process.
	2.3 Evaluate competitive practices relating to the decision-making process	What information can be gained in relation to competitor activity? Competitor V own organisation value proposition
3. Understand own organisation's unique business value	3.1 Evaluate own organisation's activity plans in relation to customers	Discussion of account planning using Kotler's Cranfield model. Each component interpreted with explanation of appropriate tools – Porter's Growth strategy and Ansoff Growth matrix. The setting of SMART objectives and how they focus activity to achieve the overall planning outcomes. Control and evaluations tools such as balanced scorecard interpreted.
	3.2 Evaluate own organisation's ability to respond to customer buying requirements	Customer experience throughout the sales process and post-sale. Capabilities assessed using SWOT analysis with emphasis on the SWOT leading to effective actions that will deliver the account plan

4. Be able to prepare for customer procurement	4.1 Explain how to maintain and update own knowledge of customers' industry sectors 4.2 Evaluate how own organisation can influence the criteria customers use to select suppliers 4.3 Conduct research into the attractiveness and compatibility of the customer to own organisation 4.4 Identify existing suppliers of customers and conduct a competitor analysis to identify own organisation's strengths and weaknesses	Explanation of the value of doing this (environment audit) and the sources of information available, such as trade association reports, trade magazines, internet search, press coverage, secondary research and customer research How to be the company that sets the specification for the product/service on offer. The use of marketing communications thought and industry leadership. Trusted advisor. Back up of guarantees, training, service level agreements and quality auditing. Selection criteria. Match these against the corporate objectives. Can the customer be won and managed successfully and profitably? Areas to consider product suitability, size and capability, margins, additional service costs and likely competitor response on price and product/ service development. Introduce Davidson's 7 step drill for competitor analysis. Match this against own SWOT to identify areas of distinction and value for the customer.

	4.5 Identify strategies for achieving preferred supplier status	Delivery - expertise and ability to deliver, service – customer centric approach and integrity – a culture of doing the right thing. Interpretation of the limits of preferred supplier status – not a guarantee of priority rights but a level of approval that means the supplier does not require further checks.
	4.6 Evaluate existing contracts between competitors and the customer	Interpretation of what competitors offer in relation to your capabilities.
	4.7 Evaluate own organisation's contractual practices relating to determining supply terms and Conditions	Benchmark against industry standard and those of other industries. Do contractual arrangements impact on sales? Collate information from customers and sales teams.
5. Be able to use information gathered to plan to develop customer accounts	5.1 Identify tactics which could be utilised to achieve the strategies in developing and winning new accounts	Develop the concepts of segmentation targeting and positioning and how they can be used to make developing and winning new business more effective. Consider the value of referrals, industry events and online activity with platforms such as blogs, direct newsletter and social media.
	5.2 Evaluate the importance of ongoing evaluation and monitoring of own current customer accounts	Regular assessment allows the salesperson to see changes in buying behaviour early which means corrective actions can be taken. Also helps with the

		management of time and resources. Is the account in decline? Items to watch – order values, cancelled appointments, competitor activity or pressure of margins. Is the account growing? Rise in order value and frequency? Requests for more visits or specialized products and swifter delivery.
	5.3 Evaluate own current customer accounts	Assessment of the criteria that could be used to make the evaluation – items such as sales volumes, profitability, product types ordered, efficiency of account management and payment terms. Refer-back to corporate and departmental objectives and the individual account plans.
	5.4 Use information gathered to plan to develop current and new accounts	Application of information into the account planning process (see 3.1) and how that combined with profiling of 5.1 will lead to objectives and strategies for the individual account plans.

Unit U502: Understanding the integrated functions of sales and marketing

Unit aim	This unit aims to support knowledge and understanding in demonstrating the commercial importance of marketing to an organisation's success, both in the long term and also for the short / medium term. It includes demonstrating the value of marketing analysis in leading an organisation to develop a strategy which focuses resources upon appropriate customers, with a clear positioning message and products / services addressing the specific requirements identified. It supports the clear interrelationship between sales and marketing.				
Level	5	ISM Unit no.	U502	RQF unit reference no.	L/503/0606
Credit Value	8	TQT	80	Guided Learning Hours	40
Mapping to National Occupational Standards	Marketing NOS 2.1.3				

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content
1. Understand how a marketing strategy supports the sales function	1.1 Analyse how a marketing strategy supports an organisation	A marketing strategy is developed to support the Organisation short- and long-term goals and needs to define a set of marketing plans to support them
	1.2 Evaluate the relationships between marketing, sales and other functions	Timely marketing information provides basis for decisions such as product development or improvement, pricing, packaging, distribution, media selection, and promotion How the marketing information system (MKiS) is used and managed.

	1.3 Analyse how a marketing strategy supports the sales function	Supporting sales through the provision of insight into market trends and the needs of consumers. Feedback from research to identify where the sales function can have most impact
2 Understand marketing research	2.1 Evaluate the use of up to date and relevant market information to support sales-related decisions	The role of the marketing audit and how that informs sales activity. Emphasis on PESTLE factors and competitor actions and customers' demands and behaviours.
	2.2 Differentiate between primary and secondary data	Explain the concepts with examples from Keynote, Mintel and others. Show sources of primary and secondary or desk research and the benefits of each approach.
	2.3 Identify and interpret trends in sales-related data	Discuss how models such as product life cycle and Boston Consulting Group Matrix can be used to manage product portfolios and marketing communication activities. Strengths and weaknesses of models analysed.
	2.4 Differentiate between sources of market information and evaluate the validity of data	Assessment of the available sources such as government information, industry journals and commentators, sector research from external research companies and competitor analysis. Internal sources such as own primary research, customer feedback and interpretation of sales information

	2.5 Evaluate a range of analytical tools to analyse sales-related information and why each one might be chosen in a given situation	Through explanation and application of statistical techniques such as ratio and interval analysis. Relationship models such as regression and cluster analysis. Application to marketing and sales planning, product portfolio analysis and strategy development.
	2.6 Analyse the suitability, relevance, validity and reliability of market information	Criteria to be used as part of the analysis, for external information: source of information, size of sample, age of data, relevance to marketplace/ industry sector. For internal: similar items along with skills involved of those who have collected and analysed the data.
	2.7 Differentiate between ways of presenting quantitative and qualitative market information interval analysis. Relationship models such as regression and cluster analysis. Application to marketing and sales planning, product portfolio analysis and strategy development.	Explanation and understanding of the difference between quantitative and qualitative research. Application to customer information and communication and use in sales presentations. Circumstances when numbers are more useful and when opinion and behaviour make a more powerful argument.

3 Understand the use of marketing research in sales	3.1 Review how to obtain feedback from colleagues about the usefulness of sales-related information 3.2 Evaluate budget allocations for obtaining market information 3.3 Evaluate the importance of the sales function contributing realistic market information to the marketing function 3.4 Evaluate how an organisation's policy on the storage of information can meet data protection requirements 3.5 Appraise how the use of sales related information can result in changes to the marketing mix and the marketing and sales strategy	Preparation and analysis of formal feedback such as questionnaires. Options for informal feedback and the limitations of that option. Cost versus benefit exercise. Budget allocation techniques such as objective and task assessed and how the cost of information may in turn open up new opportunities or prevent costly mistakes. Explanation of the marketing information system concept and how that applies in practice. Overview data protection best practice and principles for any customer data held. Setting up of procedures that protect customers. Allocation of roles and responsibilities Using sales information such as that on competitors, market chances and customer needs and how it can change pricing tactics. Discussion of similar effects in product development and promotion

4 Be able to use market analyses in sales	4.1 Employ market analyses to inform the development of a sales strategy that takes account of market trends and competitor activity	Assessment and application of the information gained from micro and macro environment analysis to the factors relevant to sales plan. Use and interpretation of other models such as Product life cycle and Porter's Five Force competition analysis and how they may impact sales forecasts and activity planning
	4.2 Review market analysis to identify a clear positioning message that aims to satisfy target	Knowledge of the current positioning of your brand and product in the market, based on the perception of the buyer. Use of the perception map for plotting the positioning of your organisation against a set of market competitors and to inform your positioning strategy
	4.3 Review the competitive edge of organisation's products/services	Use of customer feedback, independent analysis and product development plans also to inform the organisation positioning strategy.
	4.4 Complete the financial return to the organisation resulting from the targeting of customers	Size and value of expected share of market segment. Return on investment (ROI) calculation.

5 Be able to progress sales through alignment with marketing strategies	5.1 Identify how the organisation can benefit from addressing the requirements of target markets 5.2 Review how new products/ services allow the organisation to satisfy customers' changing needs and how this generates return on investment 5.3 Appraise how marketing strategies and plans help to develop and maintain positive relationships with the organisation's sales team(s) and customers, and the resulting benefits in terms of customer loyalty and competitive advantage 5.4 Evaluate the value of marketing in progressing sales	Using segments to develop targets based on factors such as accessibility, sustainability and profitability. Defining specific needs, wants and values ensures the product is as desirable as possible to the target markets How Boston consulting group matrix (BCG Matrix) review of product portfolio management informs decisions to match new product development to customer needs. ROI calculation Importance of alignment of marketing strategy with broader organisation and sales strategy. Market positioning and targeting to generate high quality leads. Generate positive brand recognition and loyalty positively impacting on salespeople interaction with customers. Measurement of sales volume, new customer generation, customer retention and loyalty. Market penetration, lead generation and sales volume

Unit U503: Sales forecasts and target setting

<table>
<tr><td>Unit aim</td><td colspan="5">This unit aims to develop knowledge and understanding of forecasting sales and setting sales targets for your own area of responsibility

The unit includes how to collect and use information to develop a sales forecast, based on past and present sales data, factors which influence sales, sales trends, market conditions and product and service developments within your organisation.

You then use forecasts based upon value and volume measures to develop sales targets.</td></tr>
<tr><td>Level</td><td>5</td><td>ISM Unit no.</td><td>U503</td><td>RQF unit reference no.</td><td>Y/503/0608</td></tr>
<tr><td>Credit Value</td><td>6</td><td>TQT</td><td>60</td><td>Guided Learning Hours</td><td>30</td></tr>
<tr><td>Mapping to National Occupational Standards</td><td colspan="5">Sales NOS 1.1, 3.1</td></tr>
</table>

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content

1. Understand forecasting in relation to sales targets	1.1 Explain how to forecast future trends	Use of qualitative (opinion and judgement-based processes) and quantitative (mathematical based approaches) methods. Qualitative – Customer surveys, Delphi Technique and sales force composite options. Quantitative time series, moving averages and use of computer modelling.
	1.2 Evaluate information needed for sales forecasting and how it is analysed	Relates to purpose and level of forecasting required. Making appropriate decisions based on balance of opinion against numbers

	1.3 Analyse common causes of variances between forecast and actual sales	Issues such as skills in forecasting ability, monitoring criteria, internal and external factors
	1.4 Evaluate the effects of failing to forecast	The impacts on corporate planning and what that means in terms of market position and overall company profitability.
	1.5 Explain how to set challenging and realistic sales objectives and targets	Working with the salesperson to agree targets. Use of historical data, market research, product developments. Understanding the sales manager's responsibility to reach corporate objectives.

2. Understand forecasting in own organisation	2.1 Evaluate own organisation's available sales information 2.2 Evaluate other information available in own organisation that could contribute to sales forecasting activities 2.3 Evaluate how plans for product and service development may impact on sales forecasts 2.4 Compare past variances between forecast sales and sales achieved and reasons for those variances	Scope and accuracy of sales information. Variables measured. Assess data such as customer records. Market research, marketing environment predictions, product/service developments and pricing changes. Finance records. Assess the likely contribution of any new product/service based on anticipated customer demand, timing of launch and expected competitor reaction. Using historical data and feedback to match performance against forecast in previous sales periods.

3 Be able to forecast sales	3.1 Use a forecasting method(s) to prepare an analysis to predict future sales trends 3.2 Consult colleagues about sales forecasts and identify the implications for the organisation	Using your research from 1.1 use a forecasting method qualitative or quantitative data to predict future sales Setting up a formal process to gather opinion and input from relevant internal sources – meetings, questionnaires and reporting

4. Be able to set sales targets and objectives and devise measurement activities to monitor them	4.1 Set Challenging and realistic sales objectives and targets based on sales forecasts	Corporate and team objectives and how this breaks down to individuals based on the sales forecast

	4.2 Devise measurement activities to monitor actual performance against forecast sales	Quantitative measures – revenue achieved, profits, sales per account, order numbers, new customers acquired, and number of calls made. Qualitative measures- customer feedback, sales skills, product knowledge, time management. Use of field visits, customer survey and reporting

Unit U504: Leading a team

Unit aim	This unit aims to provide the learner with knowledge and understanding of transactional leadership: to share a vision and to set goals and define tasks that move people towards the vision. Leadership skills include building trust, focusing people on the right tasks, creating accountability and maintaining alignment.				
Level	5	ISM Unit no.	U504	RQF unit reference no.	D/503/0609
Credit Value	6	TQT	60	Guided Learning Hours	30
Mapping to National Occupational Standards	Sales NOS 4.1 Business and administration NOS 321, 415, 418				

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content
1. Understand principles of leadership	1.1 Evaluate the relationship between leadership and management	James Kouzes and Barry Posner five characteristics of leaders. Interpretation of the key characteristics and focus of leaders and managers
	1.2 Evaluate different styles of leadership and how to select and apply these to different situations and people	Discussion of the leadership continuum from autocratic through to laissez-faire and what situations the style will need to be adapted. For example, during periods of change, in disciplinary situations. Adair's action centred leadership model –task, team and individual.

2. Know how to build trust between self and team	2.1 Explain how to make decisions considering the good of all stakeholders 2.2 Explain how to foster collaboration within own team and between own team and other teams in own organisation 2.3 Explain how to demonstrate fair, principled behaviour	Stakeholder analysis using Mendelow's power and interest matrix. Review the roles of typical stakeholders and the level and type of communications required to build trust and partnership. Application of the Block Matrix to interpret the concerns or motivations of those in the team and other teams in the organisation. Belbin's team roles. Appropriate communications/actions relevant to the position of others Strong company culture Importance of clear and honest communication with individuals and the team Need for consistency in leadership style that engenders trust and encourages two-way communication within team and organisation. The use of actions as well as words by the setting and maintaining of policies and practices that are fair to all members of the team.

3 Know how to share own vision with team	3.1 Explain how to communicate a vision to own team, which articulates underlying values and sets the context in which goals are selected and pursued 3.2 Explain how to have two-way communication with the team, enabling team members to ask questions, interpret the vision and see their role in achieving it	Communicate in multiple formats and actions to keep the message going. Plus, importance of link to wider company values and how the team goals fit in with delivery of shared success. Onboarding and integration of new staff. How to effectively provide team briefing on both a regular ad hoc basis. This can be done by face to face meeting and via use of technologies such as intranet and email or tele and video conferencing. Focus on the ability of the manager to set and explain the vision and objectives and what that means for both the team and the individual's role within it. What performance indicators will be set and what the rewards and incentives for the team will be for achievement?

4 Know how to focus team members to complete tasks and achieve objectives	4.1 Explain how to identify key tasks to achieve objectives 4.2 Explain how to allocate work to team members by communicating objectives and delegating tasks 4.3 Explain how to demonstrate encouragement and support of team members to complete tasks and achieve objectives	Recognising that not all tasks are the same and don't require the same managerial input. Prioritisation using a simple, A, B, C method – a) manager to do, b) partial delegation and c) full delegation Urgent Important matrix Clarity of objectives, allocation and delegation, skills required, Breakdown of tasks, provision of suitable resources and briefing. Responsibility and accountability for completing the task Use of appropriate praise and recognition, both formal and informal. The need for clear explanation of tasks and objectives.

	4.4 Explain how to steer a team through difficulties and challenges, including conflict	Understanding the different needs/motivations of individuals How to recognise team members who are struggling and need additional help. Recognising where the team are in the forming, storming, norming and performing phase of team development. Use of communication skills, clarity of tasks and plans and the option for two-way feedback, keep focus on objectives
	4.5 Explain how to monitor progress and quality of work and provide constructive feedback	Progress monitors can only come from the setting of SMART objectives – the benchmark for progress to be measured against. Use of milestones to pick up issues early. Use of feedback from customers, team members and the manager's own spot checks. Monitoring of mistakes and errors with subsequent costs. Feedback delivery via one to one formal or informal.
	4.6 Explain how to provide recognition when objectives are achieved	Use of formal approaches through one to one's, written confirmation and wider recognition in team settings, when and how to use. Informal and ad hoc approaches and their place. Link to KPIs'.

5 Know how to create accountability in team members	5.1 Explain how to demonstrate accountability for achieving own tasks	Setting of own goals via personal development plan and/or sharing of individual targets and performance measures with team members. Monitoring and feedback. After one to one appraisal with line manager, brief team on key points.
	5.2 Explain how to create accountability in team members	The setting of measurable objectives (SMART) and performance indicators that are applicable to team members achieving tasks The discussion and ownership of any tasks. A culture of openness, trust and honesty versus fear culture. Provisions of necessary support and skill enhancement to enable the individual to achieve them.

6 Know how to maintain alignment of own actions with team and organisation	6.1 Explain how to maintain alignment of organisation's resources with its vision and goals 6.2 Explain how to demonstrate consistency in strategy, structure and resource allocation at operational level 6.3 Explain how to demonstrate own actions as being congruent with own words, at interpersonal level	Benchmark work progress and team performance against corporate goals. Assess where variance may be – staff levels and skills, other resources such as money, mechanization or marketing. Take corrective action. Consistency demonstrated by benchmarking and review against task completion, individual and team objective. Regular assessment and feedback to target and taking of any corrective action. Gather feedback from team members and line manager in relation to actions and other communication. Develop an approach to personal assessment and evaluation as part of an overall personal development plan.

Unit U505: Motivation and compensation for sales teams

Unit aim	This unit aims to review and evaluate motivation and compensation for sales (or account) teams. This unit is about how team leaders and managers can achieve results through motivation of, and compensation to, the sales team. Compensation covers wages / salary, plus incentives, commission, bonuses, and other rewards to sales teams. The unit focuses on the principles of motivating sales staff to produce excellent results by reducing negative feelings, encouraging positive feelings, creating enthusiasm and involvement, and concentrating efforts on key issues. 'Compensation' relates to salaries and wages as well as 'rewards' i.e. incentives, bonuses, commission				
Level	5	ISM Unit no.	U505	RQF unit reference no.	R/503/0610
Credit Value	6	TQT	60	Guided Learning Hours	30
Mapping to National Occupational Standards	Sales NOS 4.3				

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content
1. Understand motivation and compensation for sales teams and individuals	1.1 Evaluate the interrelationship between motivation, compensation, and sales success 1.2 Explain motivation theories and team building techniques that support motivation	Complex application of motivational theory. Intrinsic and extrinsic motivations. Compensation, salary, salary + commission, commission only Review of Maslow's Hierarchy of Needs and Herzberg and Vroom and the more specific applications to the workplace.

	1.3	Identify the importance of providing recognition for the sales team	Forms of recognition from public praise to bonus award. Discussion of Herzberg's hygiene factors and how individuals require rewarding work, training and profitability. Discover individuals motivating factors.
	1.4	Review methods to recognise sales performance	Quantitative methods such as customer satisfaction scores, new business pipeline and customer retention and growth. Contrast with qualitative methods such as customer satisfaction scores, new business pipeline and customer retention and growth.
	1.5	Evaluate the range of financial and non-financial incentives and motivational tools available to motivate members of the sales team	Assessment of incentives available – financial salary increases, bonus and commission. Non-financial – promotion, training, projects, additional responsibility, larger customer accounts and internal recognition.
	1.6	Explain how to carry out appraisals and performance assessments in order to judge the levels of personal motivation in the sales team	Setting up a formal process. Agreement of KPI's with written confirmation. Set dates for regular review, (one to ones) with reference to performance against KPIs and opportunity for discussion in relation to non-quantitative items.
	1.7	Evaluate how personal development plans can be used	Explanation of PDP format and the key components

		to encourage motivation and achievement	How to develop with individual with emphasis on the individual's own input and setting of objectives.
	1.8	Explain performance measures that can be used to measure and evaluate sales teams	Distinguish between measures for the individual and those for the team overall. Sales targets and budgets, performance against forecast. Customer focused measures – feedback, service standards, retention and growth. Performance measured against the individual's PDP.
2. Be able to review motivation and compensation for own sales team	2.1	Review formal and informal methods by which the motivation of own sales team is monitored and measured	Informal methods such as face to face meetings, social occasions and feedback. Use of formal assessment via one to ones, customer feedback and performances against objectives. Factors to consider when reviewing – size of team, geographical split, customer base, environmental changes and performance against other teams.
	2.2	Evaluate recognition and the compensation package(s) for own sales team	Benchmarking against other internal departments and sales teams across other industries. Assessment via salesperson feedback and any changes in performance in response to improvements in package.
	2.3	Evaluate scope for change in recognition and compensation	Understanding the existing culture and approach of

		package(s) in order to maintain or improve motivation	organisation to sales and reward and recognition. Look at how any changes would affect costs and projected increase in sales performance. Understand market factors that could limit the ability to change.
	2.4	Review performance measures that are used to measure and evaluate own sales team	Evaluate the relevance of what is measured. Question is it still relevant to salesperson/team/organisation and marketplace? Importance of matching to objectives. Measures to reflect current corporate objectives and not historical procedures.

Unit U506: Coaching and mentoring

Unit aim	This unit aims to provide understanding of the principles of coaching and mentoring, and the skills for planning, delivering a coaching or mentoring programme and for and evaluating own coaching or mentoring practice.				
Level	5	ISM Unit no.	U506	RQF unit reference no.	Y/503/0611
Credit Value	6	TQT	60	Guided Learning Hours	30
Mapping to National Occupational Standards	Management NOS MSC D7, Sales NOS 4.2				

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content
1. Understand the principles of coaching and mentoring	1.1 Describe the principles of coaching and mentoring	Key aspects: one to one development discussions, develops the individual strengths and weaknesses, a non-directive development format, covers both individual and organizational goals and have a focus on performance improvement and individual skill development.
	1.2 Explain how linking mentoring with objectives and activities is effective in developing individuals, teams and organisations	Linking to objectives to give the long-term nature of mentoring focus. By taking broad view of the individual it is more about career and personal development than specific tasks. Encourages results through team and organisational success.

	1.3 Explain how coaching and mentoring can benefit individuals, teams and organisations	Understand the differences between coaching and mentoring and when to use. The skills required by the mentor and coach. Assessment of the longer-term nature and focus on personal development as opposed specific job skills and task achievement of mentoring and the more specific nature of coaching.
	1.4 Explain the processes of coaching and mentoring	For coaching individual improvement from the setting and achievement of goals to improve a particular aspect of performance and behaviour. Mentoring- shaping the individual's beliefs and values over the longer term. Achievement
	1.5 Explain the boundaries of coaching and mentoring	Discuss circumstances when coaching or mentoring becomes counselling. Work within the limits of your own competencies. Importance of starting with clear guidelines and objectives.
	1.6 Evaluate the importance of communication skills in coaching and mentoring	Skills related to listening, questioning, suggestion, interpreting and activity setting.
	1.7 Explain how to conclude the coaching or mentoring process, reviewing success against agreed criteria	Ending the coaching process will be set out at beginning of project, in relation to the objectives set and the time frame agreed. A final formal review on achievement.

2. Be able to plan a coaching or mentoring programme	2.1 Plan a coaching or mentoring programme based on identified performance needs 2.2 Agree success criteria for a coaching or mentoring programme	Use of GROW model – goal, reality, options and what – framework for coaching/mentoring programme. Work back to the individual's goals in their PDP and those of the team and organisation.
3. Be able to deliver a coaching or mentoring programme	3.1 Organise coaching or mentoring sessions 3.2 Deliver coaching or mentoring sessions and maintain records 3.3 Review coachees' or mentees' progress toward their agreed goals	Practical issues around timing, preparation, location, format and follow up. Skills required, being effective – focusing on the individual, non-directive nature, recording of notes and action points. Emphasis on career development. Setting of milestones towards final goal. Assessment of development from results achieved. Use of feedback from team/peers and senior managers.
4 Be able to evaluate own coaching or mentoring practice	4.1 Gather feedback and evaluate own coaching or mentoring practice 4.2 Evaluate the impact of coaching or mentoring on the individual, the team and the organisation	Gathering of feedback from the coachee or mentee and their assessment of effectiveness and progress. How the individual's performance can be assessed against agreed objectives and key performance indicators. Expand to include the wider team and organisation using performance measures consistent with corporate planning hierarchy.

Unit U507: Designing, planning and managing sales territories

Unit aim	The aim of this unit is to develop knowledge and understanding of the design, planning and management of sales territories and the work of the sales team in those territories. You will analyse the market and appraise options for the definition of territories in order to establish the appropriate territory plan to optimise the sales effort. You will also be expected to plan and resource the work of the sales team in those territories.				
Level	5	ISM Unit no.	U507	RQF unit reference no.	D/503/0612
Credit Value	6	TQT	60	Guided Learning Hours	30
Mapping to National Occupational Standards	Sales NOS 1.2, 1.4, 2.7				

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content
1. Understand sales territory design, planning and management	1.1 Identify the reason why own organisation has chosen its sales territories	Introduce organisation and territory structures – geographical, product, customer based and account size.
	1.2 Review own organisation's market and customer segmentation strategies in relation to market	Organizational **strategy** used to break down the target **market** into smaller more manageable groups with similar needs. Variables used to segment the market. Explain benefits of specialization.
	1.3 Explain how to undertake an investigation and evaluation of sales territories	Review territory in relation to customer activity, new customers, target achievement, competitor activity etc. Is maximum time spent with the right customers and traveling time limited

	1.4 Evaluate sales territories taking into account the size and economic support systems that may influence choice of territory boundaries	Measurement of number of customers and call frequency against average weekly call rate and working weeks per year. Cost to manage workload against predicted returns
	1.5 Evaluate the potential turnover, profit and growth potential of a territory	Estimating number of clients and calculating turnover from historical data or similar account size measurements. Incorporate growth potential and environmental factors (PESTLE) to predict potential
	1.6 Review resource requirements for a territory in terms of sales activities	Use workload requirements, potential and assess against company objectives.
	1.7 Explain why territory administration and information about potential territories are important to territory planning	Benefits of planning and the ability to manage resources and meet customers and potential changing needs and competitor activity
	1,8 Explain how to manage sales territories In terms of size, location, number of customers, prospective accounts and number of contacts	Explanation of structuring methods in detail from 1.1 Introducing new and existing customer territory planning structure.
	1.9 Identify how to monitor evaluate and measure territory and individual sales performance	Set targets for territory based on potential. Set targets for individual based on activity, history and sale potential. Match both to overall team and corporate targets

2. Understand factors that affect territory management	2.1 Evaluate competitor activities relating to territory structures	Which territory planning criteria are used by competitors
	2.2 Identify the spread of own organisation's potential and existing customers	Establish criteria for customer assessment. Size, product/service purchase, purchase history, strength of relationship and environmental factors.
	2.3 Review own organisation's sales forecasts and sales targets and criteria for successful territories	Establish accuracy of sales achievement to sales target. Review successful territories and the key factors in that success. Understand factors that influence sales target – corporate and departmental objectives.
	2.4 Evaluate sales budgets and own organisation's performance management systems	Budget setting options and approaches. Explanation of benefits and limitations of benchmarking. Performance measures evaluated – balanced scorecard, individual KPI's appraisals and assessments.
	2.5 Identify the key drivers for selecting or retaining a territory management approach for structuring sales team activities	Establish performance criteria and how team delivers to corporate targets. Assessment of territory potential and workload changes.

	2.6 Evaluate suitable territories through investigation of the financial, economic and external marketing environments	Use knowledge of territory planning techniques to match resources to marketplace and customer need. Assessment of factors such as costs to service customer and likely business potential.
3 Be able to review and revise territory plans	3.1 Carry out a market assessment on a territory based on own organisation's criteria, including external market information and sales forecasts	Use of PESTLE and SWOT to give insight. Review performance using current territory setting approach.
	3.2 Review the time and human resources needed to cover a territory and meet sales and profit targets	Take into account current success and structure. The role of technology and impact on efficiency. Costs involved in recruitment, salary and operations.
	3.3 Evaluate the risks and benefits of defining new sales territories	Assessments of benefits – achievement of targets, better use of resources, the right team members doing the right work. Against – disruption to customers, unsettlement of team individuals, need to upgrade skills.
	3.4 Plan sales resource requirements based on information about number, size and location of customers	Detailed calculation based on territory spread, number of customers and visit frequency

	3.5	Set financial and sales activity targets for the sales team	Match into wider objectives of company. Understand the role of salary and commission in targeting.
4 Be able to resource sales territories	4.1	Set boundary lines for each sales territory	Match agreed territory planning approach to workload. Communicating the boundaries and reasoning to each team member via one to ones and KPI's
	4.2	Assign sales team members territories by matching knowledge, abilities and skills	Knowing team members strengths, weaknesses and experience. Set territories in line with individual KPI's and past performance,

Unit U508: Analysing the financial potential and performance of customer accounts

Unit aim	The aim of this unit is to ensure sales and account managers have the skills to analyse and manage the financial performance of customer accounts. It costs much more to win a new customer than it does to retain an existing customer. However, organisations often fail to realise the costs of maintaining customers. This unit is about how to maximise profit by monitoring accounts. You need to understand that measurement of potential and financial performance of customer accounts must be undertaken at the opening of the account and throughout the relationship with your customer. If you measure and understand the profitability of accounts, you can direct and define the development of your customer relationships and their overall impact on your business.				
Level	5	ISM Unit no.	U508	RQF unit reference no.	H/503/0613
Credit Value	6	TQT	60	Guided Learning Hours	30
Mapping to National Occupational Standards	Sales NOS 1.4, 3.5, 8.1				

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content
1. Be able to use financial tools to assess and prioritise new accounts and measure potential value	1.1 Estimate the lifetime value cash flow that will be generated if the customer maintains an average loyalty level 1.2 Calculate the sales volume required to achieve target profitability	Calculate the customer value by establishing the value of an average order and multiply by customer frequency rate and then multiply by average customer lifetime. Using average profitability previous sales to establish required performance to reach target.

	1.3 Measure the potential variable costs that could impact on the profitability of accounts	Demonstrate and explain fixed versus variable costs. Potential variables – staff, materials, other resources etc.
2. Be able to follow the organisation's management accounting procedures	2.1 Evaluate costs of fixed overheads and administrative support and apply them in line with the organisation's management accounting procedures 2.2 Use a customer account profit statement for ongoing measurement of customer performance	Recognising the items that make up fixed costs and how they are apportioned to your division. Establishing means of evaluation and understanding of organisation allocation of costs. Allocate costs against order value of customer. Set in place regular updates and monitoring.

3. Be able to evaluate financial risks	3.1 Evaluate the business and financial risks associated with each account and draw up a risk profile of the accounts 3.2 Estimate the value of each account using available financial and qualitative evidence 3.3 Review the financial performance and other features of each account to identify key trends and variances 3.4 Make business decisions about the future direction of an account based on its financial performance	Risk profiling – discussing areas such as ability to pay, too big to manage, too small to service, potential for growth. Collating financial information (lifetime value, profitability) with opinion research and direct feedback from customer and wider marketplace. Techniques to plot data over time periods and against other data. Explain use of variance analysis. Understanding the key factors to take into account. Evaluate time and resources needed to service the account. Establishing a balance against external circumstances, corporate objectives and account profitability.

	3.5 Prepare contingency plans for when problems arise in financial performance of an account	Understanding of scenario planning, regular review and techniques to use to tackle problems- communication, research, change of approach etc.
	3.6 Consult and communicate with stakeholders to ensure that they have access to appropriate financial performance data	Identify stakeholders. Plan communication patterns and techniques for individual stakeholder groups. Establish particular needs. Understanding Power/interest matrix to establish level of activity.

Unit U509: Relationship management for account managers

Unit aim	This unit aims to provide knowledge and skills for relationship management in sales				
Level	5	ISM Unit no.	U509	RQF unit reference no.	M/503/0615
Credit Value	6	TQT	60	Guided Learning Hours	30
Mapping to National Occupational Standards	Sales NOS 5.5, 9.6				

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content
1. Understand how to build relationships with accounts	1.1 Explain what information is needed about the account and competitors	Customer Attractiveness factors and relative strength factors. Understanding your sustainable competitive advantage.
	1.2 Describe how to build trust with accounts	Key aspects of honesty, empathy, openness and sharing of aims and objectives. Sector, legal and product knowledge
	1.3 Explain how to provide expertise to improve the productivity of the account	Developing relationships at many levels and not just salesman to buyer. Peter Cheverton 'Opportunity Snail'

	1.4 Explain how to reduce the account's financial burden	Knowledge of where costs are incurred. Reduction through use of technology, investment in process and accuracy of service/product offer in line with perceived customer value.

	1.5 Explain how to improve the quality of service provision 1.6 Describe how to maintain account loyalty to own organisation	Understanding customer requirement. Review and measure service quality, use of Servqual review and reduction of service quality gaps. Investment in customer focus. Research into marketplace, customer relationship and product/service development. Regular communication and excellent customer service.
2. Understand how to use networking in sales	2.1 Evaluate methods for developing a personal network of contacts to meet current and future needs for information, resources and sales opportunities 2.2 Explain the importance of reciprocity and confidentiality in networking 2.3 Evaluate methods for maintaining communication with contacts in personal network	How to use technology, internet sites like LinkedIn, industry journals, sector events, profile raising, exhibitions, social networking and direct approaches. Development of trust and longer-term nature of nurturing relationships. Using events, email, social occasions and social media opportunities

3 Understand how to use consultative selling	3.1 Evaluate methods for researching prospective customer organisations suitable for consultative selling	Use of CRM system to identify features of organisations that currently buy from us and the key attributes necessary and desirable in prospective customer organisations How to use industry journals, sector research, companies house, exhibitions and networking.
	3.2 Evaluate methods for establishing rapport and own credentials with customer organisation	Assessment of direct approach, use of third parties and establishment of sector leadership using online tools and literature.
	3.3 Evaluate strategic questions to identify issues in the customer organisation which represent sales opportunities	A range of questioning techniques – SIIS (situation, issue, implication, solution. – SPIN (situation, problem, implication, need pay-off)
	3.4 Quantify in financial and strategic terms the effects of the most important issue or opportunity	Prioritising of issues. Financial and non-financial impact. Fit with Strategic objectives. Use of scenario planning to give value to opportunity
	3.5 Evaluate solutions for the customer organisation issue	Assessment of value added by solution. Fit with organisation's objectives.

4 Know when and how to undertake stakeholder analysis	4.1 Describe the importance of and the need for stakeholder analysis 4.2 Describe how to identify and analyse the needs and concerns of different stakeholders	The stakeholder map and interrelated and conflicting demands they make on the organisations Categorisation using internal/external and connected stakeholder mapping. Using Menelow Power/ interest Matrix to target and give emphasis to communications and activity.
5 Understand how to monitor and control customer relationships	5.1 Evaluate the concept of monitoring and control in maintaining relationship management activities 5.2 Evaluate own organisation's requirements relating to monitoring and control activities 5.3 Evaluate methods of formal and informal feedback for monitoring of key customer activities 5.4 Identify and evaluate techniques to be used to analyse information obtained during monitoring and control 5.5 Identify key strengths and weaknesses of the relationship and areas for improvement	Recording customer retention, account profitability and growth. KPI's for individual account managers reflecting relationship management activities. What to measure and how to achieve organisations own objectives. Use of external research for objective feedback Options available internally – survey, ad hoc feedback, collation of information from other departments. Development of MkIS (Marketing Information System) and how information is gathered and analysed to inform strategic decisions and relationship expansion. Collating information via MkIS SWOT analysis

Unit U510: Bid and tender management for account managers

Unit aim	This unit aims to provide knowledge and skills for bid and tender management. Bid and tender management involves working to strict timescales, producing documentation to support the bid and tendering the bid.				
Level	5	ISM Unit no.	U510	RQF unit reference no.	A/503/0617
Credit Value	6	TQT	60	Guided Learning Hours	30
Mapping to National Occupational Standards	Sales NOS 5.1				

Learning outcomes. The learner will:	Assessment criteria. The learner can:		Indicative content
1. Understand the principles of bid and tender management	1.1	Describe the principles of bid and tender management	Project management skills. Identifying the information required, stakeholders, planning, needs & risk analysis, how to differentiate your bid, allocating resources, deliver to deadline, review and learn.
	1.2	Describe the bid cycle	From receipt of bid, decision to bid/no bid, preparation, plan, submission and final evaluation.

2 Be able to prepare for a bid	2.1 Analyse the role of management and own organisation's procedures for bidding 2.2 Identify the customer's perspective and needs	Current approach to bidding and success rate. Allocation of resources. Level of management commitment and involvement. Assessment of available skill levels. Setting up a bid team. Analysis of key benefits customer is looking for. Why are they using a bid process? Assessment of the benefits they are seeking.
	2.3 Qualify the opportunity 2.4 Determine the bid strategy 2.5 Analyse competitors who may also bid 2.6 Establish a bid plan	Making the bid/ no bid decision. Qualifying criteria. Plus, profitability and value decisions based on costs to delivery against overall contact value. Any other benefits other than monetary value. Risk assessment. Strategic choices – For each bid how to win, tackling customer's set criteria, developing uniqueness. When and how to use partners and alliances. Key competencies of competitors and analysis of major differences. Understand their capabilities and how they might meet customer's need. Key elements of plan. Appointing a bid manager/ controller. Satisfying core elements, adding any differentiating factors, managing resources, financial assessment. Submission and review.

3 Be able to write a bid	3.1 Write a bid to meet the needs of customer and own organisation	Understanding structure of bid, compliance with any bidding procedure, satisfying requirement of bid, being able to deliver all aspects of customer criteria. Elements that make the bid stand out. Value to organisation over lifetime of bid contract.
4 Be able to tender a bid to the customer	4.1 Tender a bid to the customer	Meeting the deadline, the mechanics of delivery, supporting information and confirmation
5 Understand how to follow up the tendering of the bid	5.1 Explain how to carry out post tender activities	Request feedback, analysis of process – timing, resources, meeting customer needs, compliance and preparation of learning outcomes.

Unit U511: Developing a product portfolio

Unit aim	This unit aims to provide the knowledge and skills for determining selling priorities across a portfolio of products /services based upon an understanding of the current and potential profitability of the components of the portfolio. It includes assessing the products /services within the portfolio to determine which might be retained and developed, as well as any risk and vulnerabilities associated with the portfolio.				
Level	5	ISM Unit no.	U511	RQF unit reference no.	T/503/0616
Credit Value	6	TQT	60	Guided Learning Hours	30
Mapping to National Occupational Standards	Sales NOS 2.10				

Learning outcomes. The learner will:	Assessment criteria. The learner can:	Indicative content
1. Understand product portfolio development	1.1. Explain the importance of long and medium-term planning to the success of a portfolio of products / services	Changing nature of markets, customer demands and external factors (PESTLE). Developing and maintaining a sustainable competitive advantage.
	1.2. Evaluate the sales and organisation benefits obtained from being involved in the portfolio development process	Development of market position, profitability, developing customer relationships, business growth – Ansoff Matrix
	1.3. Outline the factors to be considered when reviewing the profitability of products / services	Costs of production and materials. Factors putting pressure on prices. Assessment of competitor actions. Porters Five Forces factors- threat of new entrants and power of dynamics.

	1.4. Evaluate tools and techniques used in analysing product and service portfolios from a sales perspective 1.5. Review how to develop contingency plans to address risks and changing circumstances 1.6. Evaluate the inter-relationships that occur between products / services within a portfolio and their impact on buying decisions 1.7. Evaluate the need to consult with colleagues and other stakeholders during the review of a portfolio	Collating information. Review effectiveness of Product Life Cycle (PLC) and Boston Consulting Group Matrix (BCG) Recognising sources of risk, scenario planning for business environment changes. Discuss Planning frameworks, assess appropriate project management process Using the PLC to asses each product position. Assessing connections of products and services via bundling, add-ons and analysis of purchase behaviour. Assessment of information requirements. Decision making responsibilities. Role of HR, finance, marketing, operations, production. Using the Block Matrix to understand relationships.
2. Understand how to contribute to the development of a product portfolio	2.1 Evaluate the importance of contributing to the development and marketing of products / services that offer the best return on investment, in line with the organisation's objectives, and how to do so	Assess New Product Development process. Focus on key stages of marketing strategy and business analysis. Understanding the role of sales in the process

	2.2 Evaluate the importance of monitoring how your products / services are priced, promoted and distributed, in response to feedback from customers	The role of marketing information system (MKIS), using research customer feedback, and competitor analysis to plot trends and evaluate.
3. Be able to analyse the product portfolio	3.1. Analyse the range of products / services within the portfolio 3.2. Assess how to monitor demand for your products / services 3.3. Write a business case for amendments or additions to your organisation's portfolio, including the investment required and the forecast return on investment 3.4. Analyse the profitability and lifecycle of the products / services within the portfolio 3.5. Analyse the markets at which the products / services are targeted and determine factors impacting upon their growth	Portfolio composition and analysis. More explanation of BCG matrix and explanation of GE matrix and comparison with Shell Directional Matrix Use of sales data, customer feedback and research. Sales forecasting and pipeline management. Economic analysis- Sales forecast and breakeven. ROI, NPV Stages of product lifecycle. Review product portfolio using BCG Growth -Share Matrix PESTLE, Porters five forces, MIK system

