ISP Level 6 Diploma in Chartered Sales Professionalism

15.4 Sales & Marketing

603/5905/5

Qualification Specification

Level 6

Contents

Change Control

Summary of changes to this specification since last publication date

Version	Publication date	Summary of change
2.0	Feb-22	Full refresh and rebrand from original APS Qual Spec

Introduction

This qualification specification outlines all you need to know to deliver this qualification as an Approved Training Provider of the Institute for Sales Professionals (ISP) and should be read in conjunction with ISP Approved Training Provider Guide.

You should always ensure you are using the most recent version of this specification, please check ISP website or speak to a member of the ISP Education Team if you are unsure.

The qualification has been developed and is awarded by ISP and sits on the Regulated Qualifications Framework (RQF). The RQF is a qualification framework regulated by Ofqual.

Institute of Sales Professionals

The Institute of Sales Professionals (ISP) is an internationally recognised professional sales body, which advances and promotes excellence in the sales profession. It is a community of sales professionals building standards of excellence, diversity and education ensuring the best knowledge, understanding, skills and practice in the sales profession.

ISP want their learners and members to develop sales professional knowledge and skills through a carefully structured approach, consequently our activities include:

- Professional Registration
- Sales Code of Conduct
- Continuing Professional Development programme
- Sales Professional Framework
- Professional Sales Qualifications and Certified Sales Professional status.

The ISP has members from all areas of the sales force and being registered on an ISP qualification ensures attainment of the best knowledge, skills, behaviours, and practices in professional sales. Further information can be found on the ISP website www.the-isp.org

Sales Qualifications

ISP is an Ofqual regulated awarding body of vocationally related qualifications (VRQ's), committed to the professionalism of all members of the sales force, both in the UK and Internationally. It supports all those who work at every level of the sales function and ensures they have access to relevant career progression opportunities through learning, development, and certification.

Not only is the ISP a nationally recognised professional sales qualifications body, but it also bases its qualifications on the Sales National Occupational Standards and Employer-led B2B Sales Trailblazer standards, thus ensuring that every salesperson certificated by the ISP and every apprentice certificated by the ESFA, has achieved a nationally recognised sales qualification and/or apprenticeship standard.

Qualifications Structure

In focussing its vision, the ISP has brought together, the Sales National Occupational Standards, the ISP Sales Professionalism Framework, the ISP professional sales membership journey, and industry roles and requirements. By using all these elements of the sales journey, the ISP has developed an inclusive, relevant, robust, and worthwhile set of professional sales qualifications that satisfy both national standards and industry roles and requirements.

The ISP has developed the qualifications available at Certificate and/or Diploma level:

1) Sales Professionalism (Level 3)

2) Executive Sales Professionalism (Level 4)
3) Advanced Sales Professionalism (Level 5)
4) Sales Coaching & Assessment (Level 5)
5) Chartered Sales Professionalism (Level 6)

About this Qualification

Key Facts

Qualification Accreditation Number (QAN)	603/5905/5
Total Qualification Time	490
Guided Learning Hours	298
Credit value	49
Level	6
Assessment method	Portfolio of evidence

Description & Target Audience

The ISP Level 6 Certificate & Diploma in Chartered Sales Professionalism (VRQ) are qualifications aimed at individuals who intend to develop and gain formal recognition of their knowledge, understanding and competence of working as a sales director or in a leading sales professional role. The qualifications are suitable for individuals working in, or hoping to work in, a variety of sales director or leading sales professional roles, either directing a team of sales managers or managing major sales developments and/or vital business accounts.

By achieving the qualifications learners will cover the required essentials of sales directing and/or leading sales professional roles, with respect to sales organisation and sales operations at this level. The core units cover the extremely important areas of sales strategy, planning and implementation, developing strategic relationships, business leadership and management. The range of optional units allows learners the scope to choose those areas most relevant to them, as follows; salesforce organisation, sales talent management, forecasting and budgeting, managing sales related change, managing sales enablement, developing strategic relationships, and selling with partners. The units are vocationally related units and include the relevant knowledge, application and practical elements of sales directing and/or leading sales professional roles, with respect to sales organisation and sales operations at this level.

Learners who achieve the Certificate qualification can progress onto the ISP Level 6 Diploma in Chartered Sales Professionalism, the ISP Level 6 Graduate Degree Sales Apprenticeship and can use unit credits already achieved as there is unit overlap with these level 6 qualifications. They can also progress using their CPD programme or onto other relevant qualifications e.g. Level 7 MA and MBA programmes.

Learners who achieve the Diploma qualification can progress onto the ISP Level 6 Graduate Degree Sales Apprenticeship and can use unit credits already achieved as there is unit overlap with the Graduate Degree qualification. They can also progress using their CPD programme or onto other relevant qualifications eg Level 7 MA and MBA programmes.

Delivering this qualification

Qualification Structure

To achieve the Certificate qualification learners must complete all 4 mandatory units*
To achieve the Diploma qualification learners must complete all 4 mandatory units, plus 3 optional units*

Mandatory units

Ref	Unit Title	Level	GLH	TQT	Credit
ISP601	**Sales Strategy & Leadership:** Develop sales strategies and plans. (Sales Planning)	6	30	60	6
ISP602	**Keeping & Developing Business:** Develop Strategic relationships with major customers. (Consultative Selling)	6	30	60	6
ISP603	**Winning Business (Solutions Selling):** Devise sales strategies to suit customer procurement practices. (Solution Development)	6	30	60	6
ISP604	**Sales Enablement:** Provide strategic leadership and management in sales. (Commercial Acumen)	6	30	60	6

Optional units

Ref	Unit Title	Level	GLH	TQT	Credit
ISP605	**Sales Talent Management & Compensation:** Use commercial acumen and psychology in salesforce organisation. (Commercial Acumen/Psychology of Sales)	6	50	60	6
ISP606	**Sales Strategy & Leadership:** Salesforce forecasting and budgeting (Sales Planning/Commercial Acumen)	6	40	80	8
ISP607	**Sales Enablement:** Use intelligence and insight for sales related change. (Applied Insights)	6	30	60	6
ISP608	**Keeping & Developing Business:** Plan for customer and organisation continuous improvement (Post Sales Delivery)	6	50	60	6
ISP507	Professional Development: Manage ethical, legal and professional requirements and development. (Ethics, Integrity & Trust/Management of Self)	5	38	50	5

Rules of Combination

Rules of combination is a description of the credit accumulation required for the achievement of a qualification. Certain qualifications will clearly identify where only specific optional units can be chosen to make up a larger qualification. Please contact eqa@the-isp.org if you are not sure or need further information on the rules of combination for this qualification.

Total Qualification Time (TQT)

Total qualification time (TQT) for the Certificate is 240 hours - (Guided Learning (GLH) is 120 hours)

Total qualification time (TQT) for the Diploma is 410 hours – (Guided Learning (GLH) is 238 hours)

TQT & GLH Definitions:

TQT is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required for a Learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

Total Qualification Time is comprised of the following two elements:

- the number of hours which ISP has assigned to a qualification for Guided Learning; and
- an estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study, or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the Immediate Guidance or Supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

GLH is the sum of guided learning plus examination assessment time. It is the responsibility of training providers/centres to decide the appropriate course duration, based on their learners' ability and level of existing knowledge. It is possible therefore, that the number of hours could vary from one training organisation/centre to another depending on the learners' needs.

Learner entry requirements

There are no formal entry requirements. However, learners should be able to work at level 6 or above and be proficient in the use of English Language.

Recognising Prior Learning (RPL)

Ofqual definition of RPL is the:

(a) identification by awarding body of any learning undertaken, and/or attainment, by a Learner.
   a. prior to that Learner taking a qualification which, the awarding body makes available or proposes to make available, and
   b. which is relevant to the knowledge, skills and understanding which will be assessed as part of that qualification, and

(b) recognition by an awarding body of that learning and/or attainment through amendment to the requirements which a Learner must have satisfied before the Learner will be assessed or that qualification will be awarded.

Therefore, prior to the commencement of a qualification, a Training Provider may apply the use recognition of prior learning or prior achievement to reduce the amount required to prepare a learner for assessment.

For further information on how Training Providers can apply to use RPL as described above, please refer to the Recognition of Achievement and Prior Learning Policy available in the ISP Provider Portal.

Qualification Assessment

The qualification is a combined knowledge and competence qualification. It is assessed through the completion of a portfolio of evidence, which must be internally assessed, and quality assured by the Training Provider. A portfolio of evidence gives Provider's flexibility in how individual assessment criteria are assessed.

Learners must achieve all the pass criteria across all units, to be awarded a Pass. Examples of evidence for the portfolio could include:

Knowledge criteria:

- worksheets
- record of oral and written questioning
- assignments/projects/reports
- candidate and peer reports
- record of professional discussion

Skills and behaviour criteria:

- assessor observation - completed observational checklists
- witness testimony
- record of professional discussion
- candidate and peer reports

Assessors can use other methods of assessment providing they are valid and reliable. Providers must take all reasonable steps to avoid any part of the assessment of a learner (including any internal quality assurance and invigilation) being undertaken by any person who has a personal interest in the result of the assessment.

Where each Unit has it, Providers should use the suggested assessment method. Where a Training provider wishes to used other centre-devised assessment methods these should be agreed with ISP Quality Manager before delivery commences.

All assessment evidence for this qualification should be contained within a Learner portfolio of evidence which should be internally assess and quality assured by the Approved Training Provider and externally quality assured by the ISP prior to certification (subject to ISP's Direct Claim Status policy).

All Learning Outcomes within each Unit must be met to achieve the qualification. Learner evidence within their Portfolio must be clearly mapped against the earning outcomes and assessment criteria and the location of learner evidence must be indicated in the portfolio of evidence. Achievement Logs for these qualifications, which include mapping to each Unit are available on request.

Assessors should assess only against the assessment criteria provided in this specification. Any additional assessment criteria grading will not be included in any external quality assurance activity undertaken by the ISP without prior agreement.

This qualification is only graded at Pass, with successful learners achieving a Pass.

Simulation & Realistic Working Environments

Simulation

Where simulation is used for permitted units, it should only form a small part of the evidence for the qualification. Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies. Simulation must be undertaken in a 'realistic working environment' (RWE). An RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures, and requirements for cost-effective working. Guidelines for using RWE can be found below.

Realistic Work Environment

It is essential that organisations wishing to operate an RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in an RWE the following guidelines must be met:

1. The RWE is managed as a real work situation.
2. Assessment must be carried out under realistic business pressures.
3. All services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations.
4. Learners must be expected to achieve a volume of work comparable to normal business practices.
5. The range of services, products, tools, materials, and equipment that the candidates use must be up to date and available.
6. Account must be taken of any legislation or regulations in relation to the type of work that is being carried out
7. Learners must be given workplace responsibilities to enable them to meet the requirements of the units
8. Customer perceptions of the RWE is similar to that found in the work situation being represented
9. Learners must show that their productivity reflects those found in the work situation being represented.

Assessor requirements

ISP Qualifications require nominated assessors for this qualification to meet the following:

- Demonstrable occupational competence in Sales equivalent to at least one level above the level of this qualification. This can be in the form of qualification achievement and/or work experience in a similar sales role.
- Where sales leadership competence is required, we would expect the assessor to be able to demonstrate occupational expertise and experience in a sales leadership role.

ISP also recommends that the Assessor hold, or be working towards one of the following qualifications:

- Level 3 Award in Assessing Competence in the Work Environment
- Level 3 Certificate in Assessing Vocational Achievement
- A1 Assess Learner Performance Using a Range of Methods
- D32 Assess Learner Performance and D33 Assess Learner Using Different Sources of Evidence

ISP requires Assessors to complete a minimum of 24 hours of sales related CPD activity per year.

Internal Quality Assurance requirements

ISP Qualifications require nominated IQA's for this qualification to meet the following:

- Demonstrable occupational competence in Sales equivalent to at least one level above the level of this qualification. This can be in the form of qualification achievement and/or work experience in a similar sales role
- Where sales leadership competence is required, we would expect the assessor to be able to demonstrate occupational expertise and experience in a sales leadership role.

ISP also recommends that the IQA hold, or be working towards one of the following qualifications:

- Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice
- Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice
- D34 or V1 verifier awards

ISP also recommends that the IQA to complete a minimum of 24 hours of sales related CPD activity per year.

Appendix 1 – Qualification Content

This section provides details of the structure and content of this qualification.

Each unit overview includes:

- Unit title
- Unit reference
- Unit summary
- Level
- TQT
- GLH
- Credit value
- An indication of whether a unit is mandatory or optional.

Following the unit summary there's detailed information for each unit containing:

- Learning outcomes (what the learner will learn in this unit)
- Assessment criteria (what the learner will be able to demonstrate as a result of achieving the learning outcome
- Assessment method (ISP's recommended assessment method)
- Indicative content (a guide for tutors/coaches delivering the learning as to what should be included to achieve the learning outcomes and meet the assessment criteria.
    - This content is not prescriptive but is intended to provide helpful guidance to tutors, coaches, and learners

Title	Unit 1: Develop sales strategies and plans
Reference	ISP/601
Summary	This unit is about understanding sales strategies and plans in relation to organisation strategy, the requirements of developing sales strategies and plans, the implementation of sales strategies and plans and the potential for change in sales strategies and plans.
Level	6
TQT	60
GLH	30
Credit value	6
Mandatory or optional?	**Mandatory** ☒ / **Optional** ☐

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. . Understand sales strategy in relation to organisation strategy	1.1	Evaluate organisation strategies and compliance requirements		**Organisation strategies:** Organisation strategy, business strategy, marketing strategy (objectives, plans, timeline, etc.); the link between the business and marketing strategies in order to determine sales; the relation of marketing and sales functions and their contribution to business strategy; strategic analysis (PESTLE, Porter's 5 Forces, competitive advantage); adherence to compliance requirements (organisation, business, sales, etc).
	1.2	Analyse the role of the sales team within the organisation strategy		**Role of sales team:** Sales team role in relation to the organisation / business strategy; implications of implementing the business strategy on sales team activities; key roles, supporting roles, organisation, change requirements.
	1.3	Carry out required customer segmentation and gap analysis		**Customer segmentation:** Customer segmentation analysis to identify key groups and segments (demographic, geographical, lifestyle, behavioural); target customers to

				maximise sales success; take full account of legal, regulatory, ethical and social sales requirements; gap analysis using appropriate sales and marketing tools - PESTLE, SWOT, Porter's, etc.
	1.4	Set appropriate sales objectives		**Sales Objectives:** Sales objective setting; Organisation setting procedures; SMART objectives; use of sales statistics in objective setting; sales objectives contribution to organisational strategies; Boston matrix, Ansoff matrix: full account of legal, regulatory, ethical and social sales requirements, etc.
2. Understand the requirements of developing sales strategies and plans	2.1	Analyse customer purchasing preferences		**Purchasing preferences:** Different customer purchasing preferences; determining appropriate distribution strategies; the options for distribution channels (traditional, modern, technological); features of procurement that affect distribution channel decision making, etc.
	2.2	Review and evaluate structure of the sales team		**Structure of sales team:** Evaluate sales team structure; determine sales team structure requirements; different types of sales team structure (geographic, product based, customer based, brand based, etc.); evaluate sales team ability to achieve sales, etc.
	2.3	Evaluate sales procedures		**Sales Procedures:** Investigate sales procedures; evaluate in relation to organization strategies; sales procedures and cost effectiveness; sales procedures and legal, regulatory, ethical, social requirements; sales procedures and compliance; recommend improvements where appropriate.
	2.4	Determine sales resource requirements		**Sales resource:** Establish sales resource requirements; human resources, physical resources; financial resources; sales process requirements; effective deployment of all required sale resources; recommend changes where appropriate, etc.

3. Understand the implementation of sales strategies and plans	3.1	Develop detailed sales activity plans		**Develop plans:** Produce detailed sales plan; cross reference to key organisation markers (objectives, performance, financials, legal, regulatory, ethical, social); budgets, forecasts, , etc.
	3.2	Evaluate the success of sales activity plans		**Evaluate plans:** Regularly monitor and review sales plan; monitor and review system; regular reporting; use appropriate measures for evaluation (KPIs, sales targets, financial targets, qualitative, quantitative, individual and team targets, etc.); different monitoring tools for evaluating sales success; McKinsey's 7S framework; benchmarking; etc.
4. Be able to monitor and control relationships with customers	4.1	Encourage a climate of openness in delivering sales strategies and plans		**Openness:** Importance of a climate of openness; reasons for openness; meeting and not meeting sales strategy/plan requirements; an ethical and value-based approach to governance; how to put this approach into practice.
	4.2	Make recommendations for change in delivering sales strategies and plans		**Recommendations:** Monitor and review sales strategy/plan; identify any changes required to sales strategy/plan; make appropriate recommendations, if required; support change requirements with a detailed business case; , etc.
	4.3	Appropriately communicate any changes to sales strategies and plans		**Communicate:** Communication requirements; levels of required communications; key stakeholders updated / informed; methods for consulting and communicating with sales team about strategy progress and development. etc.
	4.4	Evaluate reasons for not meeting sales strategy/plan requirements		**Reasons:** Identify reasons for not meeting sales strategy/plan requirements; correct any failures to meet sales strategy/plan requirements; contingency planning; follow appropriate organisation procedures; adjust

				policies and procedures to reduce likelihood of not meeting requirements in the future, etc.

Title	Unit 2: Develop strategic relationships with major customers
Reference	ISP/602
Summary	This unit is about understanding major customer strategic relationships, planning and developing major customer strategic relationships, and evaluating major customer strategic relationships.
Level	6
TQT	60
GLH	30
Credit value	6
Mandatory or optional?	**Mandatory** ☒ **Optional** ☐

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand the requirements of major customer strategic relationships	1.1	Explain the key differences between transactional selling and major customer relationship selling		**Differences:** Types of selling (transactional, major customer relationship / key account management); key differences and expectations; selling dimensions (sales style, nature of relationships, goals and objectives, nature of salesforce), etc.
	1.2	Explain the elements of major customer relationship management		**Elements:** Key accounts; major customers; relationship development, progression and management; McDonald's model, Roger's model of relationship progression (Pre-KAM, Early KAM, Mid KAM, Partnership KAM and Synergistic KAM); characteristics and benefits of each element for both parties.
	1.3	Produce criteria for selecting major customers for strategic relationships		**Criteria:** Key criteria for selection; classifying customers using an objective approach; identifying key accounts using a range of criterion (customer orientation, customer requirements, development opportunities, strategic growth, benefits, profitability); strategic long term value of customer, etc.

	1.4	Evaluate required behaviours for building trust with a major customer		**Behaviours:** Behaviour of individuals within your organisation; building trust and developing deeper relationships; mutual beneficial business; technical support and resource support; service level delivery and risk reduction, etc.
	1.5	Evaluate requirements for gaining agreement to develop major customer strategic relationships		**Gaining agreement:** Agreement from senior management and colleagues; conditions that enhance organisational buy-in; integration of key account programmes, increased senior management understanding, clear lines of communication, establishment of objectives and goals, organisation/sales good working relationships; clear major customer relationship definition, etc.
2. Be able to plan for major customer strategic relationships	2.1	Justify customers that satisfy the organisation’s criteria for major customer strategic relationships		**Criteria:** Customers eligible for strategic relationships; Organisation's criteria for major customer strategic relationships (profit centre, high sales value, resource requirements, mutuality of strategic goals); Cheverton’s KAISM model for classification of key accounts (based on customer attractiveness and relative attractiveness), etc.
	2.2	Detailed analysis of major customers business		**In-depth understanding:** Analysis of major customers business and performance; analysis of their corporate business and marketing strategies; market developments in the sector; sector performance; SOSTAC model, Porter’s value chain, etc.
	2.3	Analyse strategic and operational business challenges faced by major customers		**Business challenges:** Current and future strategic challenges; current and future operational challenges; visions, values, objectives and plans of major customers; role of the key account manager; Market research; PESTEL, SWOT and Porter’s five forces analysis), etc.
	2.4	Evaluate prioritised common business objectives between own organisation and major customers		**Common business objectives:** Consistent with both organisations; consistent financial objectives and business strategies; mutually beneficial; importance of alignment of visions, values, objectives and plans, etc

	2.5	Assess strategic options for achieving common business objectives with major customers		**Strategic options:** Common strategic and business objectives/topics; mutual working arrangements; justification of major customer investment; strategic management and business planning; concept of asset sharing and asset utilisation, etc.
	2.6	Work with major customers to develop strategic relationship action plans		**Action plans:** Working in partnership, addressing common objectives; addressing perceived challenges; producing action plans that are mutually beneficial; identification of any potential risks to achieving objectives; measurement and controls (KPIs, business and financial targets); regular monitoring and reviews, etc.
3. Be able to manage sales territories or portfolios	3.1	Analyse expertise required in working with strategic major customers		**Expertise:** Business expertise requirements of relationship manager; business expertise requirements of own team; identification of organisation team (required influence, attitudes, competencies); acquiring required team; ensuring added value in building effective business relations, etc.
	3.2	Effectively co-ordinate organisation's business functions in developing major customer strategic relationships		**Business functions:** Organise relevant business functions; Communicate with relevant business functions; ensure team acts as a focus for all transactions with major customer (delegating responsibility, allocating resources for joint working); identify/communicate required information needs (colleagues, major customer); build multi-point contact; clear communication structures, etc.
	3.3	Create long term value for major customers		**Create value:** Through influencing major customer business direction; take account of key internal and external views of colleagues (in relation to their priorities and business objectives); define value drivers and explain how they contribute to competitive advantage; Treacy and Wiersema's value disciplines, Porter's value chain; the concept of lifetime value, etc.

4. Be able to monitor and control sales territories or portfolios	4.1	Evaluate the outcomes of activities in developing strategic relationships with major customers		**Outcomes:** Monitor and evaluate strategic relationship outcomes and activities (return on investment, objective achievement, relationship effectiveness, mutual benefits, etc); quality control and quality assurance (link to continuous improvement, competitive advantage); management commitment; customer needs and perceptions; setting of standards (culture, consistency, adherence); continuous improvement (Just In Time, Kaizen, Quality Gap Analysis, Total Quality Management, Six Sigma and EFQM); benchmarking as a method of quantifying high quality.
	4.2	Appropriately address any concerns regarding the outcomes of strategic relationship activities		**Concerns:** Plan for strategic relationship outcomes/issues/concerns; address concerns promptly and correctly (in line with aims and objectives); manage internal and external expectations of all stakeholders; strategic planning that underpins successful KAM; Kotler's Cranfield model and reporting system, etc.
	4.3	Develop succession plans that maintain successful relationships with the major customers		**Succession plans:** Effective plans for continuing successful relationships; contingency requirements for changing individuals; balancing needs and expectations of key stakeholders; management of any conflicts of interest; strategic relationships monitoring measures and methods; resources for key account plan (human, technological, financial, marketing, operations); training and development of human resources; identifying any skills gaps (technical skills, personal skills, management skills), etc.

Title	Unit 3: Devise sales strategies to suit customer procurement practices
Reference	ISP/603
Summary	This unit is about understanding customer procurement practices, understanding customer supplier information needs and supplier organisation's unique business value, as well as preparing and developing sales strategies for customer procurement practices.
Level	6
TQT	60
GLH	30
Credit value	6
Mandatory or optional?	**Mandatory** ☒ **Optional** ☐

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand customer procurement practices	1.1	Evaluate criteria that customers use to choose suppliers		**Choice criteria:** The nature of how choices are made by the customer; the choices of each member of the customer DMU; the impact of criteria on customer procurement practices (and sales); how business critical or personally critical are their needs, etc.
	1.2	Analyse procurement practices of customers		**Procurement practices:** The different ways businesses operate in buying/procurement; using E-Procurement; reversed auctions; RFP; e-tendering; ad-hoc; how customers establish their supplier information needs; approach customers take on forecasting future demand needs, etc.
	1.3	Evaluate the assessments customers take to measure supply capability and capacity		**Capability and capacity:** The wider procurement issues beyond the product/service values; company stability assessment; financial stability assessment; ability to deliver; social aspects; CSR; reputation, etc.

	1.4	Review the concept of 'preferred supplier' status		**Preferred supplier:** Where this sits within organisations; how this may be used in own or customer businesses; what's involved in preferred supplier status; understanding the effect of the Proforce Recruit Limited v Rugby Group Limited case of 2007, etc.
2. . Understand supplier information needs of customers	2.1	Analyse how customers access supplier information		**Supplier information:** Establish supplier information requirements; access supplier information requirements (network, social media, CRM, events, exhibitions, trade associations, magazines, etc); confirmation of supplier information, etc.
	2.2	Evaluate customer practices in drawing up supplier specifications		**Specifications:** Customer needs and wants; customer requirements; buying and tendering processes; customer expectations; the balance of quality and price; the internal supply chain; key influencers from buyers, managers, operations and legal teams; understanding the history of where these specifications come from, etc.
	2.3	Evaluate competitive practices relating to customer procurement practices		**Competitive practices:** Where can competitor insight be found (previous contracts, case studies, etc).; what competitors will assume about own organisation; competitor's values and criteria; where own products are stronger than competitor's, etc.
3. Understand supplier organisations unique business value	3.1	Evaluate supplier organisation's activity plans in relation to customer procurement practices		**Organisation activity plans:** Ascertain organisation activity plans; use theory / matrix models (Kotler's Cranfield model, Porter's Growth strategy, Ansoff Growth matrix) to review activity plans of own organisation in relation to customers; understanding how these activities can add value to the customer, etc.
	3.2	Evaluate supplier organisation's ability to respond to customer procurement practices		**Organisation response:** Using relevant theory to understand companies own abilities; to be flexible and react to buyer needs; these strengths in a personal and organisational view for the customer, etc.

4. Be able to prepare sales strategies for customer procurement practices	4.1	Explain how to maintain and update own knowledge of customers' industry sectors		**Updating knowledge:** Why and how this can add value; where sources of information can be found e.g. events, exhibitions, trade magazines, trade associations, etc.
	4.2	Evaluate how supplier organisation can influence the criteria customers use to select suppliers		**Organisation influences:** Understanding theories (such as Challenger or Provocation Marketing) to influence customer buying criteria; further understanding of how and where this can be achieved through the tender process, etc.
	4.3	Conduct a competitor analysis to identify supplier organisation's strengths and weaknesses		**Competitor analysis:** Identify existing suppliers of customers; Use theories (such as Davidson's 7 Step Drill) to understand competitor strengths and weaknesses; organisation's competitive analysis procedures; mapping against own organisation's capabilities, etc.
	4.4	Evaluate existing contracts between competitors and the customer		**Competitor contract evaluation:** Sources of information; how the RFP/tender can give insight into the service currently provided; where own organisation can add additional value, etc.
	4.5	Evaluate own organisation's contractual practices relating to determining supply terms and conditions		**Organisation contract evaluation:** Own organisation's contractual restrictions and opportunities; benchmarking against competitors and market; understand where limitations need to be removed; the internal process for achieving this, etc.
	4.6	Prepare strategies for achieving preferred supplier status		**Preferred supplier strategies:** The value of becoming preferred supplier; understanding limitations (there are no guarantees); where procurement practices open opportunities to expand product portfolio, etc.
5. Be able to develop sales strategies for customer procurement practices	5.1	Use development tactics to achieve sales strategies in developing and winning new customer accounts		**Tactics:** Use segmentation to develop more tailored and targeted propositions; understanding the key values and selling points that exist in target markets; how this can be leveraged for a better pitch; the importance of referrals and visibility; visibility within the industry (through social

				media channels, events, exhibitions, trade magazines, associations), etc.
	5.2	Evaluate the importance of ongoing monitoring and evaluation of supplier customer accounts		**Ongoing evaluation:** What information is required for evaluation (e.g. to map out trends and buyer behavior); include with this a format to flag encouraging or concerning behavior (such as orders declining/growing or changes in order patterns), etc.
	5.3	Evaluate supplier current customer accounts and their procurement practices		**Customer accounts evaluation:** Use similar matrix to above; looking at own individual accounts; within this format comparing/understanding where this sits within the direction of the business, etc.
	5.4	Use information gathered to develop current and new customer accounts		**Using information gathered:** Review this information/understand how it can be used to develop accounts; look at the business and order patterns of similar accounts; how/why this is beneficial for cross-selling insight to other customers, etc.

Institute of Sales Professionals

Title	Unit 4: Provide strategic leadership and management in sales	
Reference	ISP/604	
Summary	This unit is about understanding strategic leadership in sales, understanding strategic management in sales, being able to contribute to the strategic direction of the organisation and being able to review own strategic leadership and management requirements.	
Level	6	
TQT	60	
GLH	30	
Credit value	6	
	Mandatory ☒	**Optional** ☐

Learning Outcome – the learner will:	Assessment Criteria – the learner can:		Assessment Method	Indicative contents:
1. . Understand strategic leadership in sales	1.1	Evaluate strategic leadership and management in sales		Relationship: Role of a leader; role of a manager; requirements of strategic leadership and management, etc.
	1.2	Justify strategic leadership styles and their impact on the sales team and individuals		Leadership styles: Different leadership styles; Autocratic; Democratic; parental; Laissez-Faire); styles of leadership; future demand needs; impact on managers, team and individuals, etc.
	1.3	Analyse the need to adapt leadership styles in different situations		Adapt: Adapting styles in different situations; reasoning; requirements; outcome benefits; advantages of different leadership styles, etc.
	1.4	Evaluate transformational and transactional leadership		Evaluate: Transformational leadership requirements; transactional leadership requirements; highlight differences; highlight advantages and disadvantages, etc.
	1.5	Justify the skills required to be a strategic leader		

2. Understand strategic management in sales	2.1	Evaluate strategic management styles and their impact on the sales team and individuals		Skills: Strategic leadership skills; requirements of a good strategic leader; attributes of a good leader; vision; charisma; motivation; organisation; communication; monitor and review, etc.
	2.2	Explain and justify the tools and methods of strategic management		Management styles: Recognised management styles; future demand needs; impact on managers, team and individuals; Functions of Management (Henri Fayol and Drucker); Rensis Likert Behaviour; Theory X and Y, etc.
3. Be able to constructively contribute to the strategic direction of the organisation	3.1	Evaluate ways to contribute to the organisation's strategic direction		Tools and methods: Management tools and methods (e.g. Planning, setting objectives, monitoring, resource allocation, influencing and negotiation); John Adiar's Action Centred Leadership; coaching, GROW Model; motivation (Maslow, Herzberg, Expectancy theory), etc.
4. Be able to review own strategic leadership and management requirements	4.1	Evaluate own current and future skills required for strategic leadership and management		Strategic direction: Organisation's vision, mission statement, aims and objectives; organisation's values, strategy, methods, tactics; strategy and implementation (objectives, teams, resources, evaluation, control), etc.
	4.2	Produce a plan for personal development of strategic leadership and management skills		Personal development: Personal development plan; Personal SWOT analysis; objectives, developments and improvements required; continuous professional development requirements; continuous personal development requirements, etc.

Title	Unit 5: Use commercial acumen and psychology in salesforce organisation
Reference	ISP/605
Summary	This unit is about using commercial acumen in organising the salesforce, understanding the psychology of factors affecting the salesforce, as well as using commercial acumen and psychology in planning and reviewing salesforce organisation and resources.
Level	6
TQT	60
GLH	50
Credit value	6
Mandatory or optional?	**Mandatory** ☐ / **Optional** ☒

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Be able to use commercial acumen in organising the salesforce	1.1	Evaluate different sales and working practices in the sales force		**Practices:** Salesforce organisational practices; sales practices; working practices; working methods - central base, regional base, remote working, social media, etc; reporting systems; use of CRMs; meetings, etc.
	1.2	Analyse salesforce use of current and new technology		**Technology:** Current technology used; possible future technology usage; contribution of technology to the organisation (in developing competitive advantage); sales planning; sales direction; sales achievement and reporting; integral part of sales-force organisation; cost effectiveness eg remote working, etc.
	1.3	Justify the required resources to be deployed in the sales force		**Resources:** Human resources; financial resources; capital resources; technical resources, etc; recommend the number of sales people required; review territory design; rewards and compensation for salespeople; essential tools for the job, etc.
	1.4	Evaluate required quality assurance processes for salesforce organisation		**Evaluate:** Salesforce monitoring and review, quality control and quality assurance systems; setting

				appropriate standards; measurement of these standards; contingency and mitigation; the concept of continuous improvement; techniques used (just in time, kaizen, quality gap analysis, total quality management, Six Sigma, EFQM); benchmarking as a quantifying method of quality, etc.
	1.5	Evaluate salesforce recruitment, selection and maintaining practices		**Salesforce:** Review salesforce (right people, right role, right MO); process of recruitment (external sourcing and internal promotion); use of job and person specifications; use of specialist expertise for recruiting, selecting and keeping sales people; training and development of teams (formal and informal approaches); importance of individual and team development; coaching; motivation and compensation, etc.
2. Understand the psychology of factors affecting salesforce organisation	2.1	Evaluate legal and regulatory requirements in salesforce organisation planning		**Legal and regulatory:** Laws, regulations, codes of practice; ethics and morals; health and safety; equality and diversity; employee rights; contract law, etc; in relation to salesforce structures, procedures and activities; show how health and safety, equality and diversity are integral to the role of salesforce management; address the various aspects of employment law which affect the sales team, etc.
	2.2	Analyse trends and developments in the sector that affect salesforce planning		**Trends and developments:** Current and future trends; important sector developments; impact on salesforce organisation; importance of proactive evaluation (trading environment, current and future sector changes, impact on sales strategy); evaluation tools (macro environment, PESTEL analysis, Porters five forces); methods for the consolidation of information (SWOT analysis, 6 C's framework), etc.

	2.3	Analyse organisation strategies which may impact on future sales force planning		**Organisation strategies:** Corporate strategy; business strategy; marketing strategy; financial strategy, etc; the concept of strategy and how strategy is designed to develop organisational competitive advantage; Michael Porter's model (three Generic Strategies to show alternative methods for developing organisational strategy), etc.
3. Be able to use commercial acumen and psychology in planning salesforce resourcing	3.1	Analyse salesforce requirements to achieve sales targets		**Salesforce resource:** Review salesforce requirements; identify potential gaps in salesforce and resources that need to be filled; ongoing monitoring and reviewing; objective analysis of salesforce capability and resource in order to achieve the sales; methods/tools for analysis, etc.
	3.2	Justify required resources needed for the sales force		**Required resources:** Required resources; scope of resources; use sales planning and forecasting information to determine resource requirements; importance of good quality plans and accurate sales forecasts, etc.
4. Be able to use commercial acumen in reviewing salesforce structural requirements	4.1	Evaluate current salesforce structure against future requirements		**Structure:** Current salesforce structure; potential future salesforce structure; evaluating current sales structure and comparison to future requirements; impact/development on proposed business and sales strategy, etc
	4.2	Justify resources for future salesforce requirements to support the development of		**Future salesforce:** Future salesforce resource requirements; importance of proactive/pre-emptive analysis of market developments; making/supporting the necessary adjustments to the salesforce and sales structure; Piercy and Lane's checklist for organisations which have low market IQ (and suffer as a result); the evolution of sales relationships (from transactional towards key account management); new sales approaches for developing repeat business; the

				consequential effects on resource availability and resource type, etc.

Title	Unit 6: Salesforce forecasting and budgeting
Reference	ISP/606
Summary	This unit is about understanding the key factors that impact on sales forecasting, understanding the techniques of sales forecasting, being able to monitor and review actual sales against forecast sales, and understanding budgeting methods and variances.
Level	6
TQT	80
GLH	40
Credit value	6
Mandatory or optional?	**Mandatory** ☐ **Optional** ☒

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand the key factors that impact on sales forecasting	1.1	Evaluate internal factors that impact sales trends		Internal: Relevant internal factors (business strategy, financial strategy, marketing strategy, key stakeholders, salesforce, motivation, etc); McKinsey's 7S framework, other models, etc.
	1.2	Evaluate external factors that impact sales trends		External: Relevant external factors (political, legal, economic, technological, social, etc); STEEPLE; Competition; Porter five forces , etc.
2. Understand the techniques of sales forecasting	2.1	Justify the qualitative techniques for sales forecasting		Qualitative: Advantages and disadvantages of qualitative sales forecasting techniques; the use of opinions; the use of intuition; the knowledge and expertise of experienced people, trust, honesty, etc.
	2.2	Justify the quantitative techniques for sales forecasting		Quantitative: Advantages and disadvantages of quantitative sales forecasting techniques; the use of historical data; the use of factual data; the use of applicable data; data sources; data currency, etc.

	2.3	Evaluate using computer software for sales forecasting		Computer software: Computer modelling; use of quantitative data; data manipulation; speed and accuracy; visual representation; interpretation; computer security, etc.
3. Understand the effect of sales forecasting on organisational planning	3.1	Evaluate the usefulness of sales forecasting		Usefulness: Sales forecasting's worth; sales forecasting's applicability; short, medium and long term sales forecasting; effect on different parts of the organisation; what sales forecasting can achieve within each time horizon; different organisational stakeholder's use of sales forecasting, etc.
	3.2	Analyse sales forecasting's impact on organisational planning		Organisational: Impact of sales forecasting on organisational planning (business strategy, marketing strategy, financial strategy, technological strategy, operational strategy, etc); sales forecasting's impact on sales income; required resources (human, financial, organisational, etc), etc.
	3.3	Evaluate sales forecasting's impact on sales sales managers and their sales objectives, targets, budgeting and remuneration systems		Sales: Relationship of forecasting to target-setting; relationship of forecasting to objective setting; relationship of forecasting to budgeting; relationship of forecasting to remuneration systems; relationship of forecasting to sales managers and the sales force, etc.
4. Be able to monitor and review actual sales against forecast sales	4.1	Evaluate the importance of measuring and monitoring actual sales against forecast sales		Importance: Importance of monitoring and reviewing sales; importance of measuring sales achievement; importance of comparison; forecast Vs actual; impact on strategy and operations; accountability; contingency planning, etc.
	4.2	Use appropriate sales measuring and monitoring methods		Personal development: Organisation sales measuring tools; organisation monitoring and review methods (control charts, Z charts, error analysis); comparing actual sales against forecast sales; understanding

				outcomes/potential outcomes; revising sales forecasts; mitigation; contingency, etc.
5. Understand budgeting methods	5.1	Justify budgeting methods that support sales forecasts		Budgeting methods: Review appropriate budgeting methods; select most appropriate method; ensure accurate budget that supports sales forecasts; budgeting methods (incremental, activity -based, zero –based, performance based), etc.
	5.2	Evaluate methods for allocating the sales budget to sales teams		Allocating: Review methods for allocating sales budget; ensure appropriate sales budget for sales team and individuals; budgeting to support targets; budgeting to support quotas; budgeting to support potential, etc
	5.3	Analyse causes of sales budget variances		Variances: Review methods to identify causes of variances; review causes of variances; variances between sales budget and actual expenditure; variance analyses; external v internal factors; contingency planning; rectifying and re-aligning, etc.

Title	Unit 7: Use intelligence and insight for sales related change
Reference	ISP/607
Summary	This unit is about understanding the key elements and effects of sales related change, being able to use intelligence and insight in gaining support for sales related change and using intelligence and insight in managing sales related change and the change plan.
Level	6
TQT	60
GLH	30
Credit value	6
Mandatory or optional?	**Mandatory** ☐ / **Optional** ☒

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand the elements of sales related change	1.1	Analyse key elements of sales related change		Elements: Recognising when sales related change is required; key opportunities for sales related change; identifying when to 'hit the trigger'; ensuring sales related change completely supports organisation objectives; sales related change as a strategic issue; using internal and external analyses to predict change (Porter's Five Forces, McKinsey 7S, STEEPLE, SWOT), etc.
	1.2	Evaluate and justify models for sales related change		Models: For achieving sales related change; ensuring sales related change supports organisation objectives; change models (planned and emergent, hard and soft models); application of sales related change in the sales function, etc.
2. Understand the effects of sales related change	2.1	Evaluate the key effects sales-related change		Key effects: Planned sales related change and likely effects; effect on sales related achievements; effect on organisation objectives; different types of sales related change; the impact of sales related change; strategic alignment with organisation's objectives; required impact assessments, etc.

	2.2	Analyse human impact of sales-related change		Potential impact: Impact on individual sales people; Impact on sales team; impact in relation to other departments; how sales related change affects salespeople and teams; how this can be assessed, etc.
	2.3	Evaluate effect of sales-related change on stakeholders		Stakeholders: Sales team stakeholders; stakeholders in the sales process; their needs and impact; their relative importance; their relationship to sales related change; outcome essentials and desirables, etc.
3. Be able to use intelligence and insight in gaining support for sales-related change	3.1	Assess methods to secure support from senior management for sales-related change		Senior management: Use intelligence and insight; methods of securing support from senior management; persuading senior management that change is required; persuading people to change (their ways, their minds, their direction); importance of openness; relevant barriers to change; change agents; change champions, etc.
	3.2	Assess methods to secure support from the sales team for sales-related change		Sales team: Use intelligence and insight; Methods of securing support from the sales team; identifying what sales team want from sales-related change; how to approach each group for support; persuading sales team that change is required; persuading sales people to change (their motivation, their direction, their objective methodology), etc.
	3.3	Justify methods for influencing stakeholders in sales related change		Stakeholders: Use intelligence and insight; Methods for influencing stakeholders; persuading stakeholders that change is required; persuading stakeholders to accept change; approaching; engaging; influencing stakeholders, etc.
4. Be able to use intelligence and insight in managing sales-related change	4.1	Plan and prepare for a sales related change		Plan and prepare: Use intelligence and insight; types of sales related change plans; methods of constructing sales related change plans; ensure implementation and monitoring of plan; change management audits; the politics of change; managing change in a sales

				environment; developing and managing a change plan, etc.
	4.2	Explain team transition requirements of sales related change		Transition: Use intelligence and insight; supporting individuals through sales related change' supporting sales team through sales related change; managing people through transition, HR support; regular review, etc.
	4.3	Manage the required outcomes of sales-related change		Outcomes: Use intelligence and insight; monitoring/review sales related change plan against required outcomes; monitoring/review sales related change plan against organisation objectives; setting targets; closing change programmes; sustaining/maintaining required outcomes, etc.

Title	Unit 8: Plan for customer and organisation continuous improvement
Reference	ISP/608
Summary	This unit is about understanding how customer insight contributes to organisation continuous improvement, the analysis of information for customer and organisation continuous improvement, and using customer and organisation insight to enhance continuous improvement.
Level	6
TQT	60
GLH	50
Credit value	6
Mandatory or optional?	**Mandatory** ☐ / **Optional** ☒

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand how customer insight contributes to organisation continuous improvement	1.1	Assess customer insight in continuous improvement		Continuous improvement: What is customer insight; importance to the business; range of business benefits that customer insight can deliver/support (pricing, proposition, process improvements, contract awards); market-based analysis eg Boston Consulting Group; Shell Directional Policy Matrices, etc.
	1.2	Evaluate the role of customer insight in achieving sales objectives		Sales objectives: Defining customer value; Treacy and Wiersema's model (defines value disciplines of operational excellence, product leadership, customer intimacy and brand leadership); show how customer insight can identify opportunities (in emerging markets, new markets, maturing markets, consolidating and fragmenting markets), etc.
	1.3	Evaluate the role of customer insight in prioritising levels of customer service offered		Customer service: Models showing how customer insight helps in prioritising levels of customer service (spectrum from transactional to relationship based marketing); can help organisation decision in focusing on transactional

				sales to some customers and a relationship orientation for others; Millman and Wilson's model (explains the various stages of key account management) and shows that customer insight aids progression towards partnership, etc.
	1.4	Evaluate the role of customer insight in developing targeted products and services		Products and services: Griffins model shows how customer insight contributes towards product development (going through three main stages); stages relate to market information, idea generation and organisational processes; reasons why new products often fail and how customer insight can overcome these; how bespoke products developed for a particular customer can be integrated into the main business offering (through use of customer insight and adaptation), etc.
2. Understand how to analyse information for customer and organisation continuous improvement	2.1	Evaluate analytical methods for customer and organisation continuous improvement		Analytical methods: How to review, develop and manage information for continuous improvement (implementation of processes, data synthesis, customer/organisation insight); what is knowledge management and its dimension (explicit, tacit, examples of both); scope of information needed that contributes to knowledge management (customer intelligence, legally required information, business driver information, personal information and financial data), working partnerships, etc.
	2.2	Evaluate methods that help understand the customer		Help understanding: Methods that generate and in-depth understanding of the customer; employ data tools and techniques to understand the customer; online data collection technologies to aid insight (social media, website usability testing, website traffic analysis); specific organisational systems to aid insight (CRM systems and MKIS systems), etc.

3. Be able to use customer and organisation insight to enhance continuous improvement	3.1	Evaluate customer insight in focused use of resources		Use of resources: Concept of objective evaluation for gaining customer insight eg Johnson and Scholes; suitability of resource use can be assessed through insight techniques (portfolio analysis, life-cycle analysis and value system analysis); techniques that assess feasibility (funds flow analysis, breakeven analysis, resource deployment analysis); techniques for assessing acceptability (profitability, cost benefit analysis, shareholder analysis); evaluation can be achieved through ratio, sensitivity and decision analysis, etc.
	3.2	Communicate customer insight to the sales team		Sales team: Customer insight for use in the sales process; appropriate communication to sales team or account managers; appropriate communication style; Doyle's decision-making unit model (explains how customer insight can provide detailed information about the key individuals involved in the decision making process), etc.
	3.3	Communicate customer insight to stakeholders		Stakeholders: Stakeholders involved in delivering service to customers; how customer insight can contribute towards marketing plans and their development; PR Smith's SOSTAC model; information can be used for external marketing and internal marketing activities, etc.
	3.4	Communicate customer insight to marketers and developers		Marketers: Marketing department; research and development; to support new product and services development; balance between customer requirements for product development and organisation capability to develop new products; continuous questioning when undertaking product development; risk evaluation techniques to assess consequences of poor product development processes and methods, etc.
	3.5	Evaluate the contribution of customer insight to continuous improvement		Contribution: Financial and non-financial measures; quantifying contribution of customer insight and effect on bottom-line sales results; concept of ratio analysis (using

				sales revenue and profitability measures for the total market as well as product/customer/market segments); range of techniques (profit margin, contribution to sales, breakeven volume, margin of safety and stock turnover); short and long term financial appraisal methods; Long term methods (investment calculations, strategic lifetime of the asset); short-term methods include understanding, etc.

Title	Unit 9: Manage Ethical, Legal and Professional Requirements and Development
Reference	ISP/507
Summary	This unit is about understanding the laws and regulations that effect the sales function, understanding compliance in relation to the sales function and how to deal with non-compliance, as well as assessing the qualities, skills and behaviours required for the sales role, and managing your professional development plan.
Level	3
TQT	50
GLH	38
Credit value	5
Mandatory or optional?	**Mandatory** ☐ **Optional** ☒

Learning Outcome – the learner will:	Assessment Criteria – the learner can:		Assessment Method	Indicative contents:
1. Understand legal, regulatory, ethical and social requirements of the sales function	1.1	Assess the legal, regulatory, ethical and codes of practice requirements in relation to sales		**Legal and regulatory:** The legal environment operated in; areas such as Data Protection; OFT; industry specific departments such as the FCS or Energy commission; implications of compliance and non-compliance for individuals; implications of compliance and non-compliance for teams; implications of compliance and non-compliance for corporations, etc.
	1.2	Analyse the potential impact of social and ethical concerns in relation to the sales function		**Impact:** The current 'status' of sales; where this has come from and why; what the business can do to change this status; the implications of doing this, sales professionalism; codes of conduct, etc..
	1.3	Explain how the organisation's processes and policies meet ethical and social requirements		**Organisation processes and policies:** Understand processes of compliance; explain to colleagues/the team the processes of compliance; who the responsible officer is; social as well as legal processes; how these can be affected positively, etc.

	1.4	Explain the principles of contract law		**Contract law:** Where this sits in the business; the processes involved with ensuring compliance; implications of compliance and non-compliance for individuals, teams and corporations; the penalties for misrepresentation, etc.
2. Understand compliance in relation to the sales function	2.1	Ensure sales people clearly understand the organisation's legal, regulatory, ethical and social procedures (and the importance of putting them into practice).		**Clear understanding:** Explain organisation's legal, regulatory, ethical, social policies and procedures; appropriately communicated; appropriate communication channels; intranets; websites; handbooks; daily practices that ensure compliance; regular updates, etc.
	2.2	Monitor the way that legal, regulatory, ethical and social policies and procedures are put into practice		**Monitor:** Monitoring procedures in relation to organisation's legal, regulatory, ethical, social policies and procedures; the ongoing improvement process to ensure continued compliance; providing support; conducting open discussions; incorporating into sales meetings; feeding back on process and procedure, etc.
	2.3	Provide a climate of openness about meeting and not meeting requirements		**Openness:** Conducting open discussions; incorporating into sales meetings; feeding back on process and procedure, peer meetings, coaching support, creating an environment of question and review; ensuring continued compliance, etc.
3. Understand how to deal with noncompliance	3.1	Identify and correct any failures to meet legal, regulatory, ethical requirements		**Identify and correct:** Create an open environment; share issues and apply procedures correctly; reasons for not meeting requirements; adjusting policies and procedures to reduce possible future failures, appropriately operate compliance processes, evidence and communication, etc.
	3.2	Provide appropriate reports of any failures to meet requirements to relevant stakeholders		**Reports:** Internal procedure to highlight and address failures; how these should be reported; what actions should be taken; what corrections should be incorporated, etc.

4. Be able to assess the qualities, skills and behaviours required for sales role	4.1	Use appropriate tools and techniques to identify own strengths for sales role		**Own strengths:** Key skills / attributes possessed; required behaviours; how they can be leveraged to increase performance; evaluating with line manager and/or peers to evaluate these strengths; why they assist performance; identifying present and future skills and behaviours needed e.g. IT, driving, specific job skills, etc.
	4.2	Use appropriate tools and techniques to identify own needs for sales role		**Own needs:** What own role is; skills and behaviours needed to be successful; reviewing with peers and line management; SWOT analysis to ensure a realistic approach to competency; identifying qualities and behaviours needed e.g. attitude, ability to adapt to change, motivation, aptitudes; experience needed e.g. previous work, voluntary work, qualifications, travel; reflective practitioner approach; 360 degree feedback; SWOT analysis; selfanalysis; comparison with person specification for role, etc
	4.3	Explain qualities and behaviours required for sales role		**Qualities and behaviours:** With reference to job description / personal specification; understand how own role fits into achievement of organisation strategies; supports organisation as a whole; knowledge of the business; skills and behaviours required to effectively operate in the role, etc.
5. Be able to manage your professional development plan	5.1	Evaluate required professional needs		**Needs:** Look at Training Needs Analysis (TNA); Developmental Needs Analysis (DNA) against skills possessed and needed for role; understand how and where these can be achieved; organisational and personal values; career and wider personal aspirations; steps needed to develop own skills, behaviours and competences, etc.
	5.2	Evaluate opportunities available for professional development		**Opportunities:** Look at opportunities to improve skills and behaviours; where fit within the desired competencies of the role; own strengths/weaknesses; look at ideas to

				enhance/improve behaviours as well as skills; compromises to make in own attitude or behaviour to meet core values and behaviours expected by organization; own behaviour, attitudes and mind-sets that may have a positive or negative impact on own sales role; learning experiences that are mutually beneficial to self and organization; in-house and external training; learning zones in organisations eg induction, coaching, shadowing, self-study, mentoring, projects; ISP, qualifications, life-long learning, etc.
	5.3	Create and progress through your professional development plan		**Plan:** Use SMART objectives to map out a development plan; look at short, medium and long term goals; ensure they map to own personal and business objectives; ensure professional development objectives are appropriate to needs of self, job role and organisation; skills audits; ISP framework; targets and action plans, etc.