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### Overview

This unit is about developing sales plans towards achieving identified targets for your organisation's products/services. It includes considering options, evaluating their relative benefits and assessing any associated risks, and ensuring that the preferred way forward protects your organisation's reputation. The resulting plans focus resources upon the activities relevant to achieving sales targets. This includes identifying the frequency and level of sales activity required.

#### Who this unit is for

This unit is recommended for those responsible for establishing selling activities for your organisation, addressing the methodology and resources involved, but who may not necessarily be sales specialists. For example, such individuals might be 'general' managers within larger organisations, or managers and/or proprietors within small to medium sized organisations.

#### Related specialist units

Those seeking specialist standards offering greater depth regarding this area are referred to the following related MSSSB units:

#### Sales units

1. Prioritise information for sales planning
2. Develop responsible sales strategies and plans
3. Contribute to the development of business plans
4. Sales activity planning
5. Plan and resource the work of the sales team
6. Ensure compliance with legal, ethical and social requirements

Details of these units can be accessed via <[www.msssb.org](http://www.msssb.org)>

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## Plan your selling activities

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### Performance criteria

*You must be able to:*

- P1 use information about customers, competitors and markets to make informed decisions about selling options, identifying and balancing the business risks with the desired outcomes
- P2 identify and prioritise those key customers and customer types to target, towards maximising sales success
- P3 establish customer purchasing preferences to determine appropriate selling activities and how best to ensure that customers can access your products/services
- P4 identify and prioritise business and sales objectives that are consistent with the agreed way forward for your organisation
- P5 assess options towards achieving the sales objectives, considering possible sales methods and targets/customer types
- P6 identify and evaluate the nature and frequency of sales activities needed to achieve sales targets
- P7 draw up a sales plan, identifying the necessary activities and resources to achieve your sales objectives
- P8 identify the sales skills and profile of sales team members needed to meet the organisation's sales targets
- P9 develop plans to meet the resource and development needs of the sales team in the short, medium and long term
- P10 identify key performance measures for monitoring and evaluating selling performance against the sales objectives
- P11 communicate the plan to all relevant people and define individual roles and targets
- P12 ensure compliance with legal, regulatory, ethical and social requirements

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### Knowledge and understanding

*You need to know and understand:*

#### **General knowledge and understanding**

- K1 the importance of long and medium-term business and sales planning
- K2 what a sales plan should cover
- K3 different sources and types of information relevant to your organisation's sales activities
- K4 how to undertake an analysis of the sales and marketing environment including political, economic, social, technological, legal and environmental factors (PESTLE)
- K5 how to undertake an analysis of strengths, weaknesses, opportunities, threats (SWOT) from a sales perspective, and how to use the information to develop sales strategies and plans
- K6 how to set sales objectives that are Specific, Measurable, Achievable, Realistic and Time-bound (SMART)
- K7 the different types of sales organisational structures, such as geographic, product based, customer-based or brand-based
- K8 potential options for making your products/services available to customers
- K9 the principles of sales activity planning
- K10 how to develop measures and methods for monitoring and evaluating performance against the sales plan
- K11 the importance of consulting colleagues during the development of the sales plan and how to do so effectively

*You need to know and understand:*

#### **Industry/sector specific knowledge and understanding**

- K12 legal and regulatory sales requirements for your sector
- K13 emerging trends in your organisation's sector and geographic area of operation

*You need to know and understand:*

#### **Context specific knowledge and understanding**

- K14 your organisation's products/services and associated sales objectives
- K15 the needs and expectations of your potential customers
- K16 who your organisation's competitors are, their sales activities, and relative success

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### Additional Information

#### Behaviours

1. You anticipate future trends
2. You articulate the assumptions involved in making decisions
3. You balance benefits against risks that may arise from the implementation of your plan
4. You recognise changes in circumstances and adjust sales plans appropriately

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**Original URN** S5

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**Relevant occupations** Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Database Administration; Software Development; Systems Support; Local Area Archives; Microfilm and Microfiche Technician; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Microsoft Certified Professional; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Engineering and manufacturing technologies; Engineering; Manufacturing technologies; Transportation operations and maintenance; Construction, planning and the built environment; Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Crafts, creative arts and design; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies;

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Social sciences; Geography; Sociology and social policy; Politics; Economics; Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forest; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Skilled Agricultural Trades; Metal Forming, Welding and Related Trade; Metal Machining, Fitting and Instrument ; Vehicle Trades; Electrical Trades; Construction Trades; Building Trades; Textile and Garment Trades; Printing Trades; Food Preparation Trades; Skilled Trades NEC; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales Related Occupations; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

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### Suite

Marketing and Sales Standards for non-specialists

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### Key words

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