

Marketing and Sales for non-specialists

National Occupational Standards

November 2007

Skills CFA
6 Graphite Square, Vauxhall Walk,
London SE11 5EE
T: 0207 0919620
F: 0207 0917340
Info@skillscfa.org www.skillscfa.org

Contents

No.	NOS Title	Page No.
CFAS1	Identify opportunities to maintain and increase revenue	1
CFAS2	Research customer needs	8
CFAS3	Prioritise your target customer	15
CFAS4	Focus your resources upon those marketing activities offering the best return	22
CFAS5	Plan your selling activities	29
CFAS6	Manage marketing and sales budgets	36
CFAS7	Target and promote your products/services effectively	42
CFAS8	Make sure that your customers can access your products and services	48
CFAS9	Plan and monitor the work of sales teams	55
CFAS10	Plan the promotion of your products and services	62
CFAS11	Determine opportunities for international sales	69
CFAS12	Use customer information effectively	76
CFAS13	Manage the buying in of marketing services	83
CFAS14	Work with suppliers of marketing/sales services	90
CFAS15	Prepare sales proposals and deliver sales presentations	97
CFAS16	Sell products and services to customers	104
CFAS17	Negotiate sales of products and services	111
CFAS18	Manage sales relationships with customers	118
CFAS19	Provide after sales support	125
CFAS20	Evaluate the effectiveness of marketing and sales activities	132
CFAS21	Manage your marketing and sales team	139

CFAS1

Identify opportunities to maintain and increase revenue



Overview

This unit is about identifying both opportunities to increase revenue through sales, and also to protect it from any threats to your organisation's future sales success. The factors considered include the competition and their activities, trends amongst potential customers, economic conditions, political and technological developments. The information required can be obtained from relevant research and as a result of feedback from customers and suppliers. Key questions to address include what do your customers, or potential customers expect from your organisation, and also what are your competitors saying and doing? Your organisation's success will depend upon how well your products/services fulfil customers' needs, and how well the benefits of your products/services are communicated.

Who this unit is for

This unit is recommended for those with responsibility for identifying and assessing sales opportunities, as well as any threats to their organisation's future sales, but who may not necessarily be marketing or 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:

Marketing units

1. Map organisations within their current and future marketing environment
2. Obtain feedback from existing customers, suppliers and others
3. Identify and monitor competitors' marketing strategies and activities

Sales units

4. Obtain and analyse sales-related information
5. Analyse competitor information
6. Use information to make sales-related decisions

Details of these units can be accessed via <www.msssb.org>

CFAS1

Identify opportunities to maintain and increase revenue

Performance criteria

- You must be able to:*
- P1 obtain information regarding customers, competitors, relevant product/service distribution, the economy and relevant technologies from a variety of sources, checking that it is valid and reliable
 - P2 identify, monitor and evaluate relevant trends and developments, including those covering political, economic and social trends, as well as regulatory and technological developments
 - P3 determine existing and potential customers' profiles and developing needs, and evaluate these for opportunities relevant to your organisation's products/services
 - P4 undertake an objective assessment of the relative strengths and weaknesses of your organisation's competitors, including an assessment from your customers' viewpoint
 - P5 identify and prioritise the strengths and weaknesses of your organisation, and potential opportunities and threats in your organisation's external environment
 - P6 develop a range of options for marketing and sales activities which could form the basis of possible recommendations and assess the implications of each
 - P7 assess your organisation's current and future required resources appropriate to meeting the growth in forecasted sales
 - P8 assess likely reactions by competitors to marketing and sales initiatives by your organisation
 - P9 recommend actions in response to your analysis towards enhancing your organisation's ability to meet market requirements and sales opportunities
 - P10 provide all appropriate parties within your organisation with relevant information
 - P11 monitor and evaluate the usefulness of information regularly

CFAS1

Identify opportunities to maintain and increase revenue

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 different sources of information regarding customers, competitors, the economy and relevant technologies, and how to use them effectively
- K2 the types of information that might be provided by customers and suppliers, and its relevance in informing marketing and sales strategy
- K3 the importance of checking the validity of information and of differentiating between objective and subjective data
- K4 how to undertake a strengths, weaknesses, opportunities and threats analysis
- K5 how to undertake an analysis of the political, economic, social, technological, legal and environmental factors in the external environment
- K6 how to build future scenarios and assess their implications

You need to know and understand:

Industry/sector specific knowledge and understanding

- K7 current and emerging trends and developments in the sector relevant to your operations
- K8 legal, regulatory and ethical requirements in the sector

You need to know and understand:

Context specific knowledge and understanding

- K9 your organisation's actual and potential customer base
- K10 the needs and expectations of your organisation's actual and potential customers and other key parties who are important for the success of your business
- K11 the relative strengths and weaknesses of your organisation's principal competitors
- K12 your organisation's performance and the factors that influence this

CFAS1

Identify opportunities to maintain and increase revenue

Additional Information

Behaviours

1. You justify all recommendations with a well argued business case
2. You articulate the assumptions made and risks involved in understanding a situation
3. You present information clearly, concisely, accurately and in ways that promote understanding

CFAS1

Identify opportunities to maintain and increase revenue

Developed by	Skills CFA
Version number	1
Date approved	November 2007
Indicative review date	November 2009
Validity	Current
Status	Original
Originating organisation	MSSSB
Original URN	CFAS1
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;

CFAS1

Identify opportunities to maintain and increase revenue

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 Service; 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

CFAS1

Identify opportunities to maintain and increase revenue

Suite

Marketing and Sales Standards for non-specialists

Key words

identify opportunities to maintain and increase revenue

Overview

This unit is about obtaining and evaluating research information to develop your understanding of customer needs relevant to your organisation's products/services.

This is a key activity towards ensuring that your organisation's products/services meet your customers' needs. It includes being clear about the reasons for the research, briefing those undertaking the work and establishing justifiable conclusions.

Who this unit is for

This unit is recommended for those responsible for identifying customer needs, such as through commissioning or conducting research, and for subsequently evaluating and utilising the resulting information towards establishing the opportunities and/or demand for products/services. Such individuals may not necessarily be marketing or sales specialists. For example, they may 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:

Marketing units

1. Define the need for research
2. Design market research projects
3. Analyse market research data
4. Evaluate and interpret findings and identify connections in complex data
5. Establish requirements for products/services

Details of these units can be accessed via <www.msssb.org>

CFAS2

Research customer needs

Performance criteria

You must be able to:

- P1 analyse the problem to be addressed, defining the key areas to be researched, and identify and agree the information required
- P2 identify the timescale and budget available for the proposed research, confirming that these are realistic
- P3 brief relevant staff, or third party suppliers, fully and accurately
- P4 agree proposals with associated actions, timescales and budget for the work required
- P5 monitor progress and outcomes, identifying and addressing any delays or issues promptly
- P6 identify themes, trends and inter-relationships in the resulting information, relevant to addressing the problem being researched
- P7 establish justifiable conclusions, ensuring that these are in line with the agreed research objectives
- P8 identify clear, persuasive and reasoned recommendations for actions, setting out how customers requirements can be realised by developing existing and/or new products/ services, and how these opportunities are to be progressed

CFAS2

Research customer needs

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of defining carefully the problem that research is to address, and how this can be achieved
- K2 the importance of involving relevant people fully in defining the problem, and in agreeing the purpose of the research
- K3 the importance of briefing potential third party suppliers of the research services fully, and the implications of not doing this
- K4 the importance of ensuring that conclusions are supported by findings, and of setting out any assumptions that may be made

You need to know and understand:

Industry/sector specific knowledge and understanding

- K5 legal, regulatory and ethical requirements affecting the design and implementation of market research programmes within your industry/sector

You need to know and understand:

Context specific knowledge and understanding

- K6 the nature of the business problem to be addressed, including the factors impacting upon the problem
- K7 key people within your organisation involved in commissioning the research
- K8 organisational requirements affecting the design and implementation of market research programmes
- K9 your organisation's overall marketing strategy and objectives

CFAS2

Research customer needs

Additional Information

Behaviours

1. You identify and make the best use of existing sources of information to meet the research objectives
2. You use cost-effective and time-effective means to gather the information required
3. You articulate the assumptions made, and risks involved, in assessing the outcomes from research

CFAS2

Research customer needs

Developed by	Skills CFA
Version number	1
Date approved	November 2007
Indicative review date	November 2009
Validity	Current
Status	Original
Originating organisation	MSSSB
Original URN	S2
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;

CFAS2

Research customer needs

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

CFAS2

Research customer needs

Suite

Marketing and Sales Standards for non-specialists

Key words

research customer needs

Overview

This unit is about identifying and prioritising potential customer groups, and therefore informing how your products/services should be marketed and sold. It includes evaluating the potential of key customer groups, and identifying priority groups based upon a realistic review of their forecast financial return. This is an essential step in ensuring that your organisation really understands who its key customers are, what they need, and that appropriate resources are then used to make sure that the potential from these key customers is realised.

Who this unit is for

This unit is recommended for those responsible for identifying and prioritising those customer groups/markets of greatest value to their organisation, but who may not necessarily be marketing or 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:

Marketing units

1. Define the customer experience towards informing marketing strategy
2. Establish and understand potential market segments
3. Establish target market segments for products/services and evaluate their potential

Details of these units can be accessed via <www.msssb.org>

CFAS3

Prioritise your target customer

Performance criteria

- You must be able to:*
- P1 gather available information regarding your organisation's target customers, relevant to establishing their buying patterns and requirements
 - P2 identify customers' motivations, attitudes and behaviours relevant to their purchasing decisions
 - P3 evaluate the available information and establish trends and patterns in the behaviours and patterns of target customers relevant to the purchasing of your organisation's products/services
 - P4 identify distinct customer groupings, or types, where relevant, according to similarities in their motivations/attitudes/behaviours
 - P5 profile identified customers, and/or types of customers, identifying their distinguishing characteristics and requirements
 - P6 identify those customers and/or types of customers that are measurable in terms of their size, buying power and profile, and evaluate their stability and potential profitability for your organisation
 - P7 evaluate and prioritise the opportunities and threats to your organisation's potential income and profitability arising from the trends and patterns identified, and subsequent customer/customer types profiled
 - P8 establish those customers/types of customers that can be accessed by your organisation's product/ service distribution system and customer service provision
 - P9 determine preferred customers/types of customers which appear to offer significant potential
 - P10 undertake risk assessments of potential threats, where the level of risk appears to be high
 - P11 justify prioritised customers/types of customers for targeting, with these being sufficiently substantial to achieve the required returns on investment for your organisation

CFAS3

Prioritise your target customer

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 different sources of information regarding customer buying patterns and how to use them effectively
- K2 methods of obtaining relevant information regarding potential and existing customers
- K3 characteristics that might be relevant to establishing customer experience, including lifestyle patterns, actual and perceived needs, age, gender, buying profiles and/or usage patterns
- K4 the importance of ensuring that research is sufficient to justify any conclusions drawn from its results
- K5 the importance of making a financial assessment of opportunities and threats identified and how to do this
- K6 the importance of ensuring that targeted customers/customer types are of a size sufficient to warrant your organisation's attention, and are also accessible to your organisation

Industry/sector specific knowledge and understanding

- K7 market developments relevant to the industry/sector within which your organisation operates
- K8 legal, regulatory and ethical requirements in your industry/sector
- K9 current and emerging trends and developments in your industry/sector
- K10 factors affecting customer decision-making within your industry

Context specific knowledge and understanding

- K11 your organisation's aims and objectives
- K12 your organisation's potential and existing customer base and profile, and the customers' decision making process
- K13 your organisation's relevant products/services
- K14 the needs and expectations of your organisation's actual and potential customers
- K15 your organisation's principal competitors, their products and the nature of their marketing and sales activities

CFAS3

Prioritise your target customer

Additional Information

Behaviours

1. You demonstrate a clear understanding of different customers and their real and perceived needs
2. You present information and arguments convincingly

CFAS3

Prioritise your target customer

Developed by	Skills CFA
Version number	1
Date approved	November 2007
Indicative review date	November 2009
Validity	Current
Status	Original
Originating organisation	MSSSB
Original URN	S3
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;

CFAS3

Prioritise your target customer

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

CFAS3

Prioritise your target customer

Suite

Marketing and Sales Standards for non-specialists

Key words

prioritise your target customer

CFAS4

Focus your resources upon those marketing activities offering the best return



Overview

This unit is about focusing your organisation's resources upon those activities effective in retaining and acquiring customers, and which maximise returns on the investment made. It includes setting out the implications for product/service development, and their distribution and also how to build awareness and use of these products/services amongst identified target customers. Such a plan identifies those opportunities offering the best return for your organisation, based upon an evaluation of those available. It therefore includes considering options, evaluating their relative benefits and assessing any associated risks. The resulting plan focuses resources upon appropriate customers, with clear objectives for products/services, addressing identified requirements.

Who this unit is for

This unit is recommended for those responsible for establishing the focus for your organisation in terms of its objectives and associated products/services to be developed and promoted to identified customers/customer groups. Such individuals may not necessarily be marketing specialists. For example, they may 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:

Marketing units

1. Develop an organisation's marketing strategy
2. Demonstrate the value of marketing to the organisation
3. Establish and maintain pricing policy for products/services
4. Ensure marketing operations comply with legal, regulatory, ethical, and social requirements

CFAS4

Focus your resources upon those marketing activities offering the best return

Performance criteria

- You must be able to:*
- P1 identify and prioritise marketing objectives which are consistent with your organisation's financial objectives and overall business strategy
 - P2 identify and justify a prioritisation of the customer groups that your organisation wishes to gain and keep
 - P3 assess strategic options towards achieving the marketing objectives, which take account of market trends and competitor activity
 - P4 identify and assess relevant market, competitor, stakeholder and business risks associated with the options considered, balancing the identified risks with the desired outcomes
 - P5 explore the opportunities for strategic partnerships and for mergers/acquisitions in achieving the marketing objectives
 - P6 identify the relevant legal, regulatory, ethical and social requirements and the effect they have on your area of responsibility
 - P7 agree a plan which builds upon the preferred option(s), and sets out specific and relevant objectives which are directed towards increasing the return upon investment, market share and, where relevant, sales
 - P8 determine a pricing plan which takes into account the organisation's full mix of products/services, and requirements to maximise the overall return on investment
 - P9 identify key performance measures, and methods for monitoring and evaluating the strategy
 - P10 identify the actions and resources required to implement the agreed strategy, with a timescale for undertaking the actions identified
 - P11 demonstrate the financial return to your organisation resulting from the effective targeting of the right customers

CFAS4

Focus your resources upon those marketing activities offering the best return

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of effective marketing towards achieving an organisation's aims
- K2 the topics to be addressed within a strategic plan
- K3 the importance of corporate social responsibility
- K4 internal and external factors to take into account when establishing pricing plans and policies for products/services, including marketing objectives and strategy, costs, nature of the market and demand, competition and other environmental factors (for example, economy, legal considerations, ethics)
- K5 the principal approaches to pricing products/services
- K6 the importance of identifying and monitoring the most appropriate means of distributing your products/services to your target customers
- K7 the importance of consulting with colleagues during the development of the plan and how to do this effectively
- K8 how to develop measures and methods for monitoring and evaluating performance against the marketing plan

You need to know and understand:

Industry/sector specific knowledge and understanding

- K9 legal, regulatory and ethical requirements in your organisation's sector
- K10 market developments in your organisation's sector

You need to know and understand:

Context specific knowledge and understanding

- K11 the needs and expectations of your organisation's actual and potential customers
- K12 your organisation's actual and potential competitors and partners, and the key features of their strategies and plans
- K13 new and available market opportunities
- K14 the relationship between price and demand for your organisation's products/services
- K15 returns upon investment required by your organisation for its products/services

CFAS4

Focus your resources upon those marketing activities offering the best return

Additional Information

Behaviours

1. You show a clear understanding of different customers and their needs
2. You communicate the plan clearly and accurately to relevant people
3. You give people opportunities to provide feedback and you respond appropriately

CFAS4

Focus your resources upon those marketing activities offering the best return

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSB

Original URN S4

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

CFAS4

Focus your resources upon those marketing activities offering the best return

and archaeological sciences; Philosophy; Theology and religious studies; 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

CFAS4

Focus your resources upon those marketing activities offering the best return

Suite

Marketing and Sales Standards for non-specialists

Key words

focus your resources upon those marketing activities offering the best return

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>

CFAS5

Plan your selling activities

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

CFAS5

Plan your selling activities

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

CFAS5

Plan your selling activities

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

CFAS5

Plan your selling activities

Developed by	Skills CFA
Version number	1
Date approved	November 2007
Indicative review date	November 2009
Validity	Current
Status	Original
Originating organisation	MSSSB
Original URN	S5
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;

CFAS5

Plan your selling activities

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

CFAS5

Plan your selling activities

Suite

Marketing and Sales Standards for non-specialists

Key words

plan your selling activities

Overview

This unit is about developing and managing a marketing and sales budget for the organisation. It includes evaluating the financial potential of key customers towards ensuring that sales activities are focused upon profitable accounts. It also includes monitoring sales against forecasts and making tactical responses where necessary.

Who this unit is for

This unit is recommended for those responsible for managing a marketing and sales budget, but who may not necessarily be marketing or 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:

Marketing unit

1. Manage a marketing budget

Sales units

2. Forecasting sales and setting sales targets
3. Set, manage and administer sales budgets
4. Evaluate the ongoing financial potential of key customer accounts

Details of these units can be accessed via <www.msssb.org>

CFAS6

Manage marketing and sales budgets

Performance criteria

- You must be able to:*
- P1 identify and evaluate relevant internal and external factors impacting upon sales for your organisation
 - P2 identify and evaluate sales trends, market conditions, and proposed marketing and selling activity to determine likely future sales for your organisation's products/services
 - P3 review estimated future sales with relevant people in your organisation and agree a sales forecast for your products/services
 - P4 prepare a realistic budget for marketing and sales activities, setting out the target sales and the anticipated costs associated with achieving these
 - P5 assess the anticipated costs against the likely benefits arising, ensuring that the costs agreed are within those which are affordable
 - P6 identify and prioritise key customer accounts, calculating the estimated sales and associated profitability for these
 - P7 assess the business and financial risks associated with each key account, and prepare contingency plans for areas of particular uncertainty
 - P8 monitor and control marketing and sales performance actively against the agreed budget
 - P9 measure the sales and profitability of key accounts
 - P10 identify the causes of any significant variances between what was budgeted, and what happens actually, and take prompt corrective action
 - P11 propose revisions to the budget, if necessary, in response to variances, or significant developments
 - P12 use information from implementing the budget to inform preparation of future forecasts and budgets

CFAS6

Manage marketing and sales budgets

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the information required for sales forecasting, how to source this, and effective means of analysing it
- K2 internal and external factors that may affect sales trends
- K3 how trends can be identified from previous sales forecasts
- K4 the importance and purpose of marketing and sales budgets
- K5 how to set challenging and realistic sales objectives
- K6 the importance of spending time on, and consulting with others, in preparing a budget
- K7 the importance of undertaking a cost/benefit analysis, and how to do this
- K8 how to use budgets to monitor and control performance for a defined area or activity
- K9 the main causes of variances and how to identify such causes
- K10 different types of corrective action which can be taken to address identified variances
- K11 how to develop a profit statement for a key customer account

You need to know and understand:

Industry/sector specific knowledge and understanding

- K12 trends that are likely to affect sales and the setting of budgets in your industry/sector

You need to know and understand:

Context specific knowledge and understanding

- K13 the objectives and operational plans for your area of responsibility
- K14 your organisation's available sales information, such as volume and value of sales, market share and penetration
- K15 the budget periods used in your organisation
- K16 the information required in establishing a marketing and sales budget
- K17 the limits of your authority

CFAS6

Manage marketing and sales budgets

Additional Information

Behaviours

1. You present information clearly, concisely, accurately
2. You act within the limits of your authority
3. You show integrity, fairness and consistency in decision making

CFAS6

Manage marketing and sales budgets

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S6

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; Social sciences; Geography; Sociology and social policy; Politics; Economics;

CFAS6

Manage marketing and sales budgets

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

Suite

Marketing and Sales Standards for non-specialists

Key words

manage marketing and sales budgets

CFAS7

Target and promote your products/services effectively



Overview

This unit is about targeting and promoting your organisation's products/services effectively. It includes implementing a budgeted action plan, aimed at ensuring that appropriate products/services are promoted and sold to relevant and targeted customers, whilst achieving the desired return upon investment. It also includes assessing the impact of the plan upon the longer term value of your business.

Who this unit is for

This unit is recommended for those responsible for managing how an organisation's products/services are developed, promoted and made available to target customers/ customer groups, but who may not necessarily be marketing 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:

Marketing units

1. Develop new products/services
2. Develop and implant packaging requirements to fulfil marketing objectives
3. Put an organisation's marketing strategy into action
4. Implement marketing strategies and plans for products/services
5. Ensure marketing operations comply with legal, regulatory, ethical and social requirements
6. Fulfil the legal, regulatory and ethical requirements impacting upon your marketing activity

Details of these units can be accessed via <www.msssb.org>

CFAS7

Target and promote your products/services effectively

Performance criteria

- You must be able to:*
- P1 make sure that people involved understand and support your organisation's marketing plan and its objectives, and also their responsibilities related to its achievement
 - P2 implement the plan as agreed and within budget
 - P3 use agreed methods and measures to monitor the implementation and performance of the plan
 - P4 assess the market and profit potential of possible new products/services, based upon valid analysis of the marketing environment
 - P5 present a clear and persuasive business case for identified new products/services
 - P6 determine and prioritise the main functions for proposed packaging, where relevant, including assessing the need to protect the product, ensure product safety, communicate particular qualities and to enable effective merchandising, in line with the marketing strategy for the product
 - P7 identify promptly any variances, or problems associated with achieving the plan, the reasons for these and alert relevant individuals within your organisation who need to know
 - P8 evaluate any significant variances in performance, and recommend reasoned responses towards addressing the variances
 - P9 make tactical adjustments to the marketing plan, or the allocation of people and resources, in a way that is consistent with your organisation's overall objectives
 - P10 evaluate the implementation of the marketing plan, identify marketing good practice and areas for improvement, and communicate these to colleagues
 - P11 ensure marketing operations comply with legal, regulatory, ethical and social requirements

CFAS7

Target and promote your products/services effectively

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of long and medium-term planning to the success of particular products/services
- K2 how to assess and manage risk in relation to planning and implementing a marketing plan
- K3 how to monitor and review implementation of and performance against the marketing plan
- K4 the importance of identifying opportunities for promoting sales through linking associated products/services, and through cross-selling and up-selling
- K5 available communication channels towards making potential customers aware of your products/services, and their relative strengths and limitations
- K6 the principal pricing strategies appropriate for new products, and the issues to be considered when applying these to new products/services, including those that are part of an existing family of products
- K7 how to prepare a valid business case and the key factors to be considered when justifying the development and marketing of new products/services
- K8 the principals of customer testing to establish customer preferences
- K9 the importance of communicating the plan to people and ensuring understanding and how to do so effectively

You need to know and understand:

Industry/sector specific knowledge and understanding

- K10 legal, regulatory and ethical requirements affecting the marketing of products/services in your organisation's sector
- K11 market developments in your organisation's sector
- K12 particular current and emerging environmental and social concerns and expectations that are relevant to the sector, and their impact for your organisation's products/services

Context specific knowledge and understanding

- K13 your organisation's marketing plans relevant to the product/services under consideration and key individuals involved in its development and implementation
- K14 your organisation's actual and potential customer base for the products/services, and their needs and expectations relating to the products/services
- K15 your organisation's actual and potential competitors, and the key features of their approach to targeting and promoting their products/services

You need to know and understand:

CFAS7

Target and promote your products/services effectively

Additional Information

Behaviours

1. You demonstrate a clear understanding of different customers and their real and perceived needs
2. You anticipate likely future scenarios based upon a realistic analysis of marketing trends and development
3. You present information clearly, concisely and accurately
4. You present information and arguments convincingly and in ways which gain the commitment and support of others

CFAS7

Target and promote your products/services effectively

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S7

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; Social sciences; Geography; Sociology and social policy; Politics; Economics;

CFAS7

Target and promote your products/services effectively

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

Suite

Marketing and Sales Standards for non-specialists

Key words

target and promote your products/services effectively

CFAS8

Make sure that your customers can access your products and services



Overview

This unit is about making sure that your organisation's products/services are available to its target customers via the most appropriate and effective means. It includes identifying customer needs in terms of accessing the products/services, and any associated information requirements, establishing objectives and identifying the resources required, including the use of any third parties/intermediaries. Examples of appropriate and effective means, often termed 'distribution channels', include making the products/services available via a sales team, or via direct marketing (including ordering via the internet/telephone/mail order), retail outlets, and/or via a third party.

Who this unit is for

This unit is recommended for those responsible for identifying and developing the means by which customers access an organisation's products/services, but who may not necessarily be marketing or 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:

Marketing units

1. Develop a distribution strategy for products/services
2. Develop a marketing distribution plan
3. Implement a marketing distribution plan
4. Motivate distribution channel members

Details of these units can be accessed via <www.msssb.org>

CFAS8

Make sure that your customers can access your products and services

Performance criteria

- You must be able to:*
- P1 determine customers' needs relating to how they might access your products/services
 - P2 determine and prioritise your organisation's objectives relating to the distribution of its products/services, and any constraints impacting upon the choice of distribution channel
 - P3 identify the distribution options available to your organisation, in line with its overall objectives
 - P4 assess potential distribution channels, evaluating their relative strengths and weaknesses towards making your organisation's products/services available to its targeted end-user, taking into account the likely return on investment and the level of control required by your organisation
 - P5 identify the nature of any intermediaries that may be required, and their respective responsibilities in making your products/services available to customers
 - P6 select, where relevant, an intermediary(ies) fitting your organisation's requirements and prepare the terms to be contained within contracts with the selected intermediary(ies), ensuring that terms are in line with your organisation's requirements
 - P7 identify and assess any risks and potential areas of conflict associated with the proposed roles and goals of any intermediaries, and determine how these might be addressed
 - P8 agree customer service level targets for any intermediaries
 - P9 ensure that all involved in the distribution of your products/services are clear regarding their roles, goals and performance criteria
 - P10 where relevant, agree with those involved in the distribution, the levels of stocks of products that they will hold
 - P11 provide positive motivators, where relevant, to those involved in the distribution, designed to maximise your organisation's return on its investment in the distribution of products/services
 - P12 monitor the performance of those involved in the distribution against agreed criteria, addressing promptly any variations from agreed roles, goals and the achieving of agreed customer service levels, in line with your organisation's requirements

CFAS8

Make sure that your customers can access your products and services

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the role of distribution and its importance in fulfilling an organisation's overall objectives
- K2 the factors to be considered and areas to be addressed in agreeing the means of distribution
- K3 the principal types of distribution and their relative strengths and weaknesses
- K4 the types of intermediaries involved in distribution and their potential roles
- K5 criteria to be considered when determining potential intermediaries, for example, experience, expertise, reputation, range of products/services carried
- K6 the importance of motivating those involved in distributing your products/services, including any intermediaries, and methods of doing this
- K7 how to develop measures and targets for monitoring and evaluating the performance of distribution plan, and also those involved in distributing your products/services

You need to know and understand:

Industry/sector specific knowledge and understanding

- K8 the means of distribution available within your industry/sector, and future factors that might affect this availability
- K9 legal, regulatory and ethical requirements affecting the marketing and distribution of products/services within your organisation's sector

You need to know and understand:

Context specific knowledge and understanding

- K10 your organisation's objectives relevant to the product/services under consideration
- K11 your organisation's target markets, and trends likely to impact upon these
- K12 your organisation's actual and potential customer base for the products/services, and their requirements relating to distribution, including their service needs
- K13 potential distribution intermediaries available to your organisation and their relative needs, problems, strengths and weaknesses in relation to meeting your organisation's distribution objectives

CFAS8

Make sure that your customers can access your products and services

Additional Information

Behaviours

1. You show a clear understanding of your different customers and their needs
2. You identify clearly the value and benefits to people of a proposed course of action
3. You show sensitivity to the needs and interests of all parties involved

CFAS8

Make sure that your customers can access your products and services

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S8

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;

CFAS8

Make sure that your customers can access your products and services

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

CFAS8

Make sure that your customers can access your products and services

Suite

Marketing and Sales Standards for non-specialists

Key words

make sure that your customers can access your products and services

Overview

This unit is about planning and monitoring sales structures and/or territories and call plans for a team of sales people. It includes identifying the most appropriate sales structures/ territories, and preparing call plans according to identified customer needs and selling opportunities.

Who this unit is for

This unit is recommended for those with responsibility for planning and monitoring the selling activities of an organisation's sales personnel, 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. Plan and resource the work of the sales team
2. Plan and manage sales territories
3. Develop, implement and monitor sales call plans
4. Devise sales strategies to suit procurement practices of key customers

Details of these units can be accessed via <www.msssb.org>

CFAS9

Plan and monitor the work of sales teams

Performance criteria

- You must be able to:*
- P1 identify factors affecting sales trends, measure the impact on the existing sales structure and resources available and consider the implications for existing and future sales structures
 - P2 evaluate the criteria which your key customers use to choose suppliers, and the impact of such criteria upon your customers' buying practices
 - P3 analyse sales resource requirements, based on information about the number, size and location of customers, and identify potential gaps that need to be fulfilled to achieve sales targets
 - P4 determine the approach appropriate for structuring your sales team activities, including whether these should be focused upon territories, particular customer types and/or industry sectors
 - P5 assign sales team members according to the approach selected, by matching their knowledge, abilities and skills to the requirements of customers within the relevant territories, customer types and/or sectors
 - P6 identify customers and prospects to contact by telephone, email, or in person
 - P7 determine the time available to deal with your prospective or existing customers in order to sell effectively
 - P8 set financial and sales activity targets for the sales team
 - P9 review the selling procedures of the sales team to ensure that they can meet sales targets, and legal and regulatory compliance requirements
 - P10 monitor the effectiveness of sales call plans, identifying promptly any significant variances from agreed targets
 - P11 make agreed tactical adjustments to call plans, where necessary, to achieve targets

CFAS9

Plan and monitor the work of sales teams

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 different ways of structuring sales forces, including territory management, customer type and industry sector management, and the reasons for preferring each
- K2 the reasons why an organisation might establish, maintain or change its sales management structure
- K3 how sales structures are established and the factors to be taken into account in establishing an appropriate structure
- K4 the concept of 'preferred supplier' status as used by customers when selecting suppliers of products/services
- K5 the variety of procurement practices used by a range of organisations
- K6 how to prioritise calls according to the potential value and probability of a sale
- K7 how to develop a call plan and record the outcome of each call effectively
- K8 how to evaluate and measure the success of sales calls
- K9 techniques for motivating a sales force, including the use of tactical sales incentives
- K10 sources of general and specialist advice on effective resourcing of the sales team

You need to know and understand:

Industry/sector specific knowledge and understanding

- K11 legal and regulatory issues impacting upon selling and related procurement practices in your industry/sector

You need to know and understand:

Context specific knowledge and understanding

- K12 your own organisation's sales strategies, plans and targets, including those in relation to relevant key accounts
- K13 employment contracts with members of the sales team
- K14 current working practices of the sales team
- K15 your organisation's products and services
- K16 the geographical spread of your organisation's potential and existing customers
- K17 the criteria used by your key customers to select their suppliers, and how they affect their procurement practice
- K18 your organisation's actual and potential competitors and partners and the key features of their selling strategies

CFAS9

Plan and monitor the work of sales teams

Additional Information

Behaviours

1. You communicate effectively with all sales team members and show respect at all times
2. You are honest, sincere and ethical in your sales approach

CFAS9

Plan and monitor the work of sales teams

Developed by	Skills CFA
Version number	1
Date approved	November 2007
Indicative review date	November 2009
Validity	Current
Status	Original
Originating organisation	MSSSB
Original URN	S9
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;

CFAS9

Plan and monitor the work of sales teams

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

CFAS9

Plan and monitor the work of sales teams

Suite

Marketing and Sales Standards for non-specialists

Key words

plan and monitor the work of sales teams

Overview

This is about planning the effective promotion and communication of your products/services. It includes confirming the target audience, and the objectives, message and means of communicating and/or promoting to that audience. Forms of communicating might include the use of advertising, direct marketing, field marketing and/or public relations, together with a variety of related product/service promotions, including price and/or sales promotions.

Who this unit is for

This unit is recommended for those with responsibility for ensuring that the target customers for an organisation's products/services are fully aware of the relevant key features and benefits of the products/services through the use of effective communications, but who may not necessarily be marketing or 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:

Marketing unit

1. Develop a marketing communications strategy and plans for products/services

Sales units

2. Pricing to promote products and services
3. Develop and implement sales promotions

Details of these units can be accessed via <www.msssb.org>

CFAS10

Plan the promotion of your products and services

Performance criteria

- You must be able to:*
- P1 identify and prioritise the objectives to be achieved by the proposed promotions, ensuring that these are in line with the plan for the relevant products/services
 - P2 identify and prioritise the customer groups and types at which the promotions are to be targeted
 - P3 monitor customer and competitor reactions to pricing strategies in order to identify opportunities for effective price-based promotions
 - P4 evaluate the promotional options, and identify, justify and agree the appropriate option for the products/services
 - P5 assess the affordability of any proposed price-based promotions and their likely effect towards achieving of sales volume and profitability targets
 - P6 identify risks in a price-based promotion and agree relevant contingencies
 - P7 seek specialist advice upon the appropriate options where necessary
 - P8 develop and agree a promotions plan and budget for the achievement of the objectives, setting out clear performance measures and timescales for their achievement
 - P9 identify the resources and capabilities required to deliver the agreed plan and establish whether these are available in-house or whether external services are required
 - P10 communicate the agreed plan, and gain commitment to its achievement from the organisation's relevant people

CFAS10

Plan the promotion of your products and services

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of effective communications and promotions, and their role in building awareness and use of your organisation's products/services
- K2 the importance of identifying the different parties with which an organisation has to communicate, including its consumers, intermediaries and other various publics
- K3 the principal forms of communication and their roles, including advertising, direct marketing, personal selling, public relations and sales promotion
- K4 the different types of price-based promotions that can be offered to your customers, and their relative advantages/disadvantages
- K5 how to assess the affordability of price-based promotions and also any associated risks
- K6 how to develop promotional objectives, actions and accountabilities, and associated budgets, and the components of an effective budget
- K7 how to identify potential risks in relation to achievement of the objectives
- K8 the importance of setting out clear performance measures for plans to communicate/promote your products/services which demonstrate a financial return for the organisation
- K9 the importance of consulting with colleagues and other relevant people during the development of the plan, and how to do this effectively

You need to know and understand:

Industry/sector specific knowledge and understanding

- K10 legal and regulatory and ethical requirements affecting communications and promotions in your organisation's sector, including their impact for social/corporate responsibility
- K11 market and sales developments in your organisation's sector

You need to know and understand:

Context specific knowledge and understanding

- K12 the market in which your organisation works
- K13 your organisation's promotional objectives, arising from the overall strategy
- K14 the needs and expectations of your organisation's actual and potential customers, and your organisation's desired response from its communications/promotions
- K15 your organisation's actual and potential competitors and partners, and the key features of their communications/promotional plans
- K16 your organisation's capabilities, resources and capacity to support a communications/promotional plan

CFAS10

Plan the promotion of your products and services

Additional Information

Behaviours

1. You anticipate likely future scenarios based upon a realistic analysis of trends and development
2. You present ideas and arguments clearly, concisely and convincingly
3. You articulate the assumptions made and risks involved in understanding a situation

CFAS10

Plan the promotion of your products and services

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S10

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;

CFAS10

Plan the promotion of your products and services

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

CFAS10

Plan the promotion of your products and services

Suite

Marketing and Sales Standards for non-specialists

Key words

plan the promotion of your products and services

Overview

This is about identifying and assessing opportunities for developing your organisation's products/services within international markets. It includes establishing the business case and an associated plan for the marketing, distribution and selling of your organisation's products/services to those markets judged to have the necessary potential.

Who this unit is for

This unit is recommended for those with responsibility for exploring opportunities for an organisation's products/services within international markets, but who may not necessarily be marketing or 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:

Marketing units

1. Assess marketing opportunities within international and/or diverse markets
2. Establish the business case and marketing plan for distributing products/services to international and/or diverse markets

Sales unit

3. Sell products or services in international markets

Details of these units can be accessed via <www.msssb.org>

CFAS11

Determine opportunities for international sales

Performance criteria

You must be able to:

- P1 define and agree your objectives from international markets
- P2 assess the markets available to the organisation and the size of the opportunity within each
- P3 identify the trading systems in the market(s) being considered , establishing the potential impact for your organisation of any tariffs, quotas, exchange controls or other possible related barriers to trade
- P4 identify the economic environment of the market(s) being considered and assess product/ service needs and associated opportunities for your organisation's products/services
- P5 determine how potential customers in the market(s) being considered perceive and use the types of products/services being offered by your organisation
- P6 assess how culture and customers' general behaviours might impact upon the marketing of your organisation's products/services in the markets being considered
- P7 identify potential competitors in the market(s) being considered and assess their marketing strategies for the products/services which would compete with those of your organisation
- P8 evaluate the sales potential for your organisation within identified markets, the resources and investment required to achieve the potential and the risks to your organisation associated with entering the markets
- P9 examine and agree the strategy for entering the identified markets, assessing the relative costs and benefits of possible options, including contingency plans for addressing particular areas of uncertainty
- P10 assess and agree the customers/customer types to be targeted, matching their buying characteristics and needs to your organisation's products/services, based upon a realistic assessment of their purchasing potential
- P11 determine the extent to which your organisation's marketing and sales activities need to be adapted to meet the requirements of the target market(s)
- P12 present and agree the business case and plan for distributing to the selected markets, including the forecast return on investment

CFAS11

Determine opportunities for international sales

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of understanding trade systems operating in the markets being considered, including any tariffs levied, quotas, exchange controls and non-tariff trade barriers, and how to do this
- K2 the factors to consider when understanding the economy of the market(s) being considered, including the industry structure and income distribution of the potential customers
- K3 the factors to be considered when assessing the political-legal environment of the market(s) being considered, including attitudes towards buying relevant products/services from overseas
- K4 how the culture and people's behaviour within particular markets can affect customer's actions in the market place
- K5 the indicators of market potential to be considered, including demographics, geographic characteristics, economic, technological and socio-cultural factors
- K6 different ways of entering markets, and their implications for an organisation upon commitment and risk, as well as the potential for control and profitability, including exporting, joint ventures and direct investment
- K7 ways to establish international sales leads including the use of agents, partnerships, trade fairs, exhibitions, conferences and published business opportunities
- K8 the marketing components to be considered, including the products/services, their pricing, promotion, packaging and distribution, and the factors to consider when deciding these for different markets

You need to know and understand:

Industry/sector specific knowledge and understanding

- K9 sources of information regarding trends and developments within different markets for your industry/sector
- K10 legal, regulatory and ethical requirements affecting the marketing of products/services to the target markets, and their impact for your organisation's social/corporate responsibility

You need to know and understand:

Context specific knowledge and understanding

- K11 the target market's economic environment, trade systems and political-legal environment relevant to the products/services to be marketed
- K12 the cultural characteristics of the customers within the target market
- K13 your organisation's relevant products/services
- K14 your organisation's culture and capacity to develop international markets

CFAS11

Determine opportunities for international sales

Additional Information

Behaviours

1. You articulate the assumptions made, and any risks involved, in understanding your analysis
2. You present information clearly, concisely and accurately

CFAS11

Determine opportunities for international sales

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S11

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;

CFAS11

Determine opportunities for international sales

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

CFAS11

Determine opportunities for international sales

Suite

Marketing and Sales Standards for non-specialists

Key words

determine opportunities for international sales

Overview

This unit is about developing and keeping up-to-date marketing and sales information and an associated database. It includes establishing what information is required regarding individual existing and potential customers, and how it is to be managed. It also includes evaluating the effectiveness of the database and taking relevant steps to enhance its usefulness.

Who this unit is for

This unit is recommended for those with responsibility for managing customer information and for organising it in a way that promotes the effective promotion and selling of an organisation's products/services, but who may not necessarily be marketing or 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:

Marketing units

1. Develop a customer information strategy
2. Implement a customer information strategy
3. Develop and maintain a marketing database

Sales units

4. Use databases to support sales activities
5. Input and access data in your organisation's information systems

Details of these units can be accessed via <www.msssb.org>

CFAS12

Use customer information effectively

Performance criteria

You must be able to:

- P1 determine and prioritise your organisation's information and database requirements regarding its existing and potential customers
- P2 identify the information held already, and also potential sources for accessing any further information required
- P3 review user requirements from the database, identifying correctly any shortfalls in the existing information provision and database functionality
- P4 liaise with systems specialists to address shortfalls in the information provision, where solutions can be developed cost effectively
- P5 assess the options for collecting the information required, determining their relative costs and benefits
- P6 analyse and structure information to develop knowledge that can be shared with relevant people, and in a format that is fit for purpose and is understood by those using it
- P7 maintain the information stored in the database, ensuring that it is accurate and up to date
- P8 identify and delete redundant records
- P9 liaise with users to assess their satisfaction with the database
- P10 evaluate the effectiveness of the database, and report and address the outcomes promptly and correctly
- P11 monitor implementation to check that all legal, industry, organisational and ethical guidelines are met, addressing any variances promptly and correctly

CFAS12

Use customer information effectively

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of information in understanding the buying patterns of customers, including how this can inform the marketing of products/services, including their development and how products/services are made available to target customers
- K2 the importance of databases to the sales function, especially in relation to identifying customers to target for specific sales campaigns
- K3 the factors to assess when determining customer information requirements, and the importance of differentiating between those requirements that are 'must haves' versus those that are 'nice to know'
- K4 the importance of maintaining an effective database, its potential applications, and how
- K5 database differs from a mailing list
- K6 the data components that might be included within a customer/prospect database, including geographic, demographic, psychographic and buying pattern data
- K7 the importance of ensuring that a database is up to date, and the implications of keeping data that is out of date
- K8 legal and ethical requirements regarding the collection, storage and use of information

You need to know and understand:

Industry/sector specific knowledge and understanding

- K9 industry/sector codes of practice and ethical guidelines relating to the use of databases and associated information
- K10 marketing/selling developments in your organisation's sector, relevant to the uses of a database

You need to know and understand:

Context specific knowledge and understanding

- K11 your organisation's user requirements from the database
- K12 the financial implications of database design and maintenance and the organisational resources available to support the work
- K13 your own levels of competence and authority in developing and maintaining the database, and to whom to refer if these are exceeded

CFAS12

Use customer information effectively

Additional Information

Behaviours

1. You check the quality, validity and reliability of information
2. You present information clearly, concisely and accurately
3. You comply with legal and ethical requirements regarding the collection, storage and use of information

CFAS12

Use customer information effectively

Developed by	Skills CFA
Version number	1
Date approved	November 2007
Indicative review date	November 2009
Validity	Current
Status	Original
Originating organisation	MSSSB
Original URN	S12
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;

CFAS12

Use customer information effectively

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 Service; 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

CFAS12

Use customer information effectively

Suite

Marketing and Sales Standards for non-specialists

Key words

use customer information effectively

Overview

This unit is about deciding whether to buy in marketing services. It includes assessing and specifying the services required, and then identifying and selecting appropriate suppliers. It therefore includes assessing tenders against agreed criteria, and selecting the most appropriate proposal.

Who this unit is for

This unit is recommended for those considering whether to buy in marketing services, such as those provided by marketing consultants, or agencies providing, for example, advertising, market research, direct marketing, sales, sales promotion, or public relations services. Such individuals responsible for buying-in services may not necessarily be marketing or 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:

Marketing units

1. Decide whether to buy in marketing/marketing communications services from external suppliers
2. Identify third party suppliers of marketing/marketing communications services

Details of these units can be accessed via <www.msssb.org>

CFAS13

Manage the buying in of marketing services

Performance criteria

- You must be able to:*
- P1 identify the range of marketing/sales skills and specialist resources required to achieve the relevant marketing/sales plans and its objectives
 - P2 determine whether your organisation possesses the skills and specialist resources necessary to deliver the services required, and according to the schedule agreed for implementing the marketing/sales plan
 - P3 gather information about possible suppliers of the services required and the costs of commissioning the range of services required
 - P4 explore, where possible, the experiences of others of buying in related services, where their views are relevant, objective and valued by you
 - P5 analyse the costs and benefits to your organisation of buying in all and/or part of the services required, identifying those requirements to be bought in
 - P6 prepare invitations to tender, setting out clearly the relevant background information, aims and objectives, required deliverables, the approximate anticipated budget available and the timescales for the proposed marketing/sales requirements
 - P7 issue invitations to tender to suppliers fulfilling the required characteristics, including your relevant contact details and a deadline for responses
 - P8 assess tenders received against agreed criteria and in line with your organisation's requirements
 - P9 select and appoint the preferred supplier(s) in line with your organisation's procedures

CFAS13

Manage the buying in of marketing services

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 sources of information regarding third party suppliers, including professional/trade bodies, recommendations and databases
- K2 the topics to be covered within invitations to tender and the importance of each
- K3 the importance of ensuring integrity and transparency in selecting third party suppliers
- K4 the importance of agreeing legal contracts and of establishing relevant copyright ownership, and how to do this
- K5 the importance of consulting with colleagues when deciding whether to buy in services, and how to do this effectively

You need to know and understand:

Industry/sector specific knowledge and understanding

- K6 industry/sector specific legislation and guidelines affecting the procedures for selecting third party suppliers of marketing services
- K7 typical costs and charging mechanisms associated with buying in marketing/marketing communications services from third party suppliers within your organisation's sector

You need to know and understand:

Context specific knowledge and understanding

- K8 your organisation's marketing/sales objectives, and the overall marketing/sales plan
- K9 your organisation's aims and objectives required of the services sought from third party suppliers
- K10 evaluation criteria for use in selecting the preferred third-party suppliers
- K11 your organisation's requirements regarding the selection of third-party suppliers
- K12 your organisation's procedures for drawing up and agreeing contracts
- K13 the limits of your responsibility and authority, and to whom to refer where these are exceeded

CFAS13

Manage the buying in of marketing services

Additional Information

Behaviours

1. You show integrity, fairness and consistency in decision making

CFAS13

Manage the buying in of marketing services

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S13

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;

CFAS13

Manage the buying in of marketing services

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

CFAS13

Manage the buying in of marketing services

Suite

Marketing and Sales Standards for non-specialists

Key words

manage the buying in of marketing services

Overview

This unit is about managing your organisation's business relationship with third-party suppliers of marketing and sales services, and monitoring their value to your organisation. It includes agreeing performance criteria and a schedule for the delivery of services, and monitoring the supplier's performance against these.

Who this unit is for

This unit is recommended for those involved in commissioning and/or managing the buying in of marketing and/or sales services from third parties, but who may not necessarily be marketing or 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 unit

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

1. Brief and work with third party suppliers of marketing/marketing communications services

Details of this unit can be accessed via <www.msssb.org>

CFAS14

Work with suppliers of marketing/sales services

Performance criteria

You must be able to:

- P1 brief third party suppliers fully and accurately, providing all necessary information
- P2 review draft proposals from the supplier(s), assessing them against the agreed aims and objectives for the marketing/sales requirements
- P3 confirm that the proposals will address the agreed requirements
- P4 accept only those proposals which fulfil the agreed aims and objectives, are justified as offering value for money, and which are in line with the overall marketing/sales aims of your organisation
- P5 identify where proposals do not fulfil the brief, and provide feedback accordingly
- P6 agree performance criteria and a scheduled action plan for the delivery of those marketing/sales services which the agency is contracted to supply
- P7 agree evaluation criteria against which the effectiveness of the selected third party supplier's proposed programme is to be assessed
- P8 monitor the supplier's deliverables and the performance of the programme against the agreed criteria, identifying any deviations promptly
- P9 address any deviations, making agreed tactical changes to the programme promptly
- P10 evaluate objectively the supplier's performance, and the effectiveness of its programme, and use this to inform future activities

CFAS14

Work with suppliers of marketing/sales services

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of briefing potential third party suppliers fully, and the implications of not doing this
- K2 the importance of clarifying the work required
- K3 the topics to be covered within proposals addressing marketing/sales requirements
- K4 how to assess objectively the merits of proposals, including the factors to be considered
- K5 the importance of establishing and maintaining agreed lines of communication with the third-party supplier
- K6 why it is important to monitor the business relationship with third-party suppliers for conflict, and how to identify the cause(s) of conflict if it occurs, and how to deal with it promptly and effectively

Industry/sector specific knowledge and understanding

- K7 industry/sector specific legislation, regulation, guidelines and codes of practice relating to the marketing/sales services being provided
- K8 market developments and trends affecting the products/services being addressed

Context specific knowledge and understanding

- K9 the levels of skills and competence, and the relative areas of strength and weakness of the third-party supplier
- K10 agreements/contracts relating to the third-party supplier, and associated service levels agreed
- K11 the aims and objectives sought from the third-party supplier

CFAS14

Work with suppliers of marketing/sales services

Additional Information

Behaviours

1. You present information clearly, concisely and accurately and in ways which promote understanding
2. you work to develop an atmosphere of professionalism and mutual support
3. you show respect for the views and actions of others
4. you recognise imaginative and innovative solutions

CFAS14

Work with suppliers of marketing/sales services

Developed by	Skills CFA
Version number	1
Date approved	November 2007
Indicative review date	November 2009
Validity	Current
Status	Original
Originating organisation	MSSSB
Original URN	S14
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;

CFAS14

Work with suppliers of marketing/sales services

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

CFAS14

Work with suppliers of marketing/sales services

Suite

Marketing and Sales Standards for non-specialists

Key words

work with suppliers of marketing/sales services

CFAS15

Prepare sales proposals and deliver sales presentations



Overview

This unit is about preparing for sales opportunities, and includes developing proposals and sales quotations, and also the preparation of both formal and informal sales presentations. It includes identifying customer requirements, matching these with your organisation's objectives and the features and benefits of your product/services, and presenting a planned sales pitch.

Who this unit is for

This unit is recommended for those involved in preparing proposals and in preparing and delivering sales presentations, but who are not necessarily 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 marketing units:

Sales units

1. Develop sales proposals and quotations
2. Develop and deliver a professional sales presentation
3. Undertake sales demonstrations

Details of these units can be accessed via <www.msssb.org>

CFAS15

Prepare sales proposals and deliver sales presentations

Performance criteria

- You must be able to:*
- P1 assess your customer's needs and their interest in your organisation's products/services
 - P2 ensure that your potential customer's requirements are understood fully and that all issues requiring clarification are resolved before the proposal is finalised
 - P3 establish and develop the content of the proposal in your house-style, including essential information about the products/services offered, including the price, terms and conditions of sale
 - P4 provide the required level of detail, as briefed by your prospect or customer, and supply the proposal within the agreed time-scales, and follow it up with an appropriate offer of further clarification and information if that is needed
 - P5 agree with you customer the length and the content of the subsequent presentation and who will be present
 - P6 identify and evaluate the most suitable audio-visual aids for effective and innovative delivery of a presentation, and the promotional material that will most complement and enhance your presentation
 - P7 ensure that your presentation includes the benefits of your products/services, relating these to your customer's needs, and follows a format designed to attract your customer's attention
 - P8 structure your presentation in a way that maximises the impact of the information and ideas within it
 - P9 ensure that any demonstration of products/services accompanying the sales presentation are prepared prior to the meeting
 - P10 anticipate problems, constraints or objections that could be raised in response to the presentation and prepare possible responses to them
 - P11 invite your audience to ask questions and to seek clarification, listening carefully to their questions, and responding positively and effectively
 - P12 aim to gain commitment to progress and, if possible, close the sale

CFAS15

Prepare sales proposals and deliver sales presentations

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the content and structure of effective proposals, and the points which these need to address
- K2 how to keep the proposal customer-focused
- K3 the range of resources and visual aids that can be used to assist in the presentation
- K4 the potential barriers that can exist in a presentation and how to overcome them
- K5 how to use verbal and non-verbal communications effectively in presentations
- K6 how to show customers that you are listening to them and understand their needs and wants
- K7 how to read buyer signals, including verbal and non-verbal cues
- K8 the variety of questioning techniques that can be used to encourage and engage customers in the presentation

You need to know and understand:

Industry/sector specific knowledge and understanding

- K9 typical procurement practices in your industry

You need to know and understand:

Context specific knowledge and understanding

- K10 details of the products/services being offered by your organisation
- K11 your customer's requirements and how these relate to your products/services
- K12 your organisation's procedures for proposal development and submission
- K13 the information underpinning the submission of the proposal including factors relating to pricing strategies and payment arrangements
- K14 sales literature and promotional offers that are complementary to the presentation and will assist in securing the sale
- K15 testimonials from satisfied customers that can be used in your presentation

CFAS15

Prepare sales proposals and deliver sales presentations

Additional Information

Behaviours

1. You are alert to verbal and non-verbal communication signals and respond to them appropriately
2. You present ideas and arguments clearly, concisely and convincingly
3. You demonstrate a thorough knowledge and understanding of your organisation's products/services

CFAS15

Prepare sales proposals and deliver sales presentations

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S15

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;

CFAS15

Prepare sales proposals and deliver sales presentations

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

CFAS15

Prepare sales proposals and deliver sales presentations

Suite

Marketing and Sales Standards for non-specialists

Key words

prepare sales proposals and deliver sales presentations

Overview

This unit is about the activities involved within the sales cycle in matching products/services to customers' needs. It focuses upon face to face selling activity, and also applies to telephone contact. It includes generating sales leads, identifying customers' buying needs, promoting the features and benefits of relevant products/services, addressing queries/ objections and closing sales with mutually beneficial terms and conditions.

Who this unit is for

This unit is recommended for those involved in the selling of their organisation's products/services, but are not necessarily 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. Generate and follow up sales leads
2. Sell products and services face-to-face
3. Manage and facilitate case negotiations
4. Handle objections and close sales
5. Demonstrate compliance with legal, regulatory and ethical requirements

Details of these units can be accessed via <www.msssb.org>

CFAS16

Sell products and services to customers

Performance criteria

- You must be able to:*
- P1 contact customers identified as sales leads, accessing those who can make buying decisions
 - P2 identify customer requirements through careful questioning, checking for understanding and summarising their buying needs and interests
 - P3 identify the key features and associated benefits of your relevant products/services, relating these to the needs identified
 - P4 discuss and assess with the customer those of your products/services which are suitable for their needs
 - P5 evaluate potential trade-offs, whereby particular aspects of the product/services' package might be enhanced whilst others of lesser importance might be reduced, that will be beneficial both to the customer and to your organisation
 - P6 provide accurate information and make proposals regarding products/services and pricing, where relevant, that meet the customer's requirements
 - P7 explore any queries or objections raised by the customer and identify any reasons holding the customer back from agreeing the sale identify and
 - P8 prioritise any concerns, and provide evidence to the customer of the strengths of your organisation and its products/services relevant to addressing the concerns
 - P9 check that the customer agrees how any concerns can be overcome
 - P10 interpret verbal and non-verbal buying signals given by the customer and act upon them accordingly in progressing towards closing the sale
 - P11 close the sale by gaining the commitment of the customer
 - P12 agree future contact arrangements, including post-sales calls to confirm customer satisfaction where relevant
 - P13 record all required details accurately and clearly
 - P14 fulfil all relevant legal, regulatory and ethical requirements

CFAS16

Sell products and services to customers

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the difference between influencers and decision makers and their relative roles in the decision making process
- K2 the key stages in the sales-cycle, and how to use this effectively in structuring the sales approach
- K3 the importance of listening effectively, and of confirming understanding
- K4 the importance of effective questioning techniques and how to use these
- K5 the difference between features and benefits, and how to use these effectively in selling
- K6 the typical range of behaviours displayed by customers, including body language, and how to respond to these constructively in a sales situation
- K7 typical objections that can arise in a selling situation, including the difference between sincere and insincere objections, and how to manage these effectively
- K8 effective methods for closing sales

You need to know and understand:

Industry/sector specific knowledge and understanding

- K9 legal, regulatory and ethical requirements impacting upon selling in your sector

You need to know and understand:

Context specific knowledge and understanding

- K10 your organisation's sales plans and objectives, including its target market, key customers and their requirements from your products/services
- K11 your organisation's products/services, and their features and benefits
- K12 your organisation's structure and lines of decision-making
- K13 competitor sales activities, and key features of their products/services
- K14 your own sales targets and plans for achieving these
- K15 your organisation's sales process and procedures, including recording requirements
- K16 available literature and materials to support the selling process

CFAS16

Sell products and services to customers

Additional Information

Behaviours

1. You present information clearly, concisely, accurately and in ways which promote understanding
2. You show respect for the views and actions of others
3. You work towards 'win-win' solutions
4. You keep promises and honour commitments
5. You work to develop an atmosphere of professionalism and mutual trust

CFAS16

Sell products and services to customers

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S16

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 Allies; 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;

CFAS16

Sell products and services to customers

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

CFAS16

Sell products and services to customers

Suite

Marketing and Sales Standards for non-specialists

Key words

sell products and services to customers

Overview

This unit is about effective sales negotiation. It includes planning and preparing for negotiations, assessing the position of both your own organisation and that of your customer, covering possible solutions and desired outcomes. It also includes handling the negotiation and arriving at agreements which are mutually acceptable.

Who this unit is for

This unit is recommended for those involved in significant sales negotiations, but who are not necessarily 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. Manage and facilitate case negotiations
2. Demonstrate compliance with legal, regulatory and ethical requirements

Details of these units can be accessed via <www.msssb.org>

CFAS17

Negotiate sales of products and services

Performance criteria

- You must be able to:*
- P1 identify what is important to the customer ahead of negotiations, prioritising their principal needs
 - P2 gain agreement in principle to do business before negotiating
 - P3 assess the bargaining power of the customer, and evaluate their overall negotiating position
 - P4 assess your organisation's relative strengths and weaknesses
 - P5 identify your objectives from the negotiations, and develop a negotiating strategy that builds upon your identified strengths and the customer's needs, and which addresses relative weaknesses
 - P6 identify the key variables for negotiation, including potential concessions and trade-offs, costing the associated parameters that might be negotiated, to identify the minimum prices and terms that might be offered
 - P7 identify and assess potential problems that might arise during negotiations, and develop solutions towards overcoming these
 - P8 ensure that all colleagues to be involved are briefed fully prior to the negotiations
 - P9 determine the customer's full requirements through careful questioning, checking for understanding and summarising to confirm
 - P10 determine, where possible, the customer's budget expectations relevant to the negotiations
 - P11 negotiate a 'win-win' situation, balancing the needs of your organisation with those of the customer
 - P12 maintain full and accurate records of the outcomes of the negotiations
 - P13 fulfil all relevant legal, regulatory and ethical requirements

CFAS17

Negotiate sales of products and services

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of effective planning for negotiations and how to do this
- K2 the components to consider in developing effective negotiation strategies and how to do this, including the information requirements regarding customers, and the sources of such information
- K3 factors to consider when assessing the negotiating power and position of customers
- K4 the importance of listening effectively, and of confirming understanding, and techniques for achieving this
- K5 questioning techniques and how to use these effectively
- K6 the difference between features and benefits, and how to use these effectively in negotiating
- K7 the typical range of behaviours displayed by customers, including body language, and how to respond to these constructively during negotiations
- K8 typical queries and objections that can arise during negotiations and how to manage these effectively
- K9 the concept of 'win-win' situations and how to create these in negotiations
- K10 key variables and trade-offs that might be considered during negotiations

You need to know and understand:

Industry/sector specific knowledge and understanding

- K11 legal, regulatory and ethical requirements impacting upon negotiating in your sector

You need to know and understand:

Context specific knowledge and understanding

- K12 your organisation's sales plans and objectives
- K13 your organisation's products/services, and their features and benefits
- K14 your organisation's structure and lines of decision-making
- K15 your organisation's target market, key customers and their requirements from your products/services
- K16 competitor sales activities, and key features of their products/services
- K17 your level of responsibility within the negotiation and the limits of your authority

CFAS17

Negotiate sales of products and services

Additional Information

Behaviours

1. You present information clearly, concisely, accurately
2. You identify clearly the value and benefits of a proposed course of action
3. You keep promises and honour commitments
4. You are firm, but fair
5. You work to develop an atmosphere of professionalism and mutual trust

CFAS17

Negotiate sales of products and services

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S17

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;

CFAS17

Negotiate sales of products and services

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

CFAS17

Negotiate sales of products and services

Suite

Marketing and Sales Standards for non-specialists

Key words

negotiate sales of products and services

CFAS18

Manage sales relationships with customers



Overview

This unit is about building and maintaining effective sales relationships with your organisation's customers. It includes understanding your customers' requirements from their suppliers, and managing all selling and related interfaces with your customers to ensure effective customer management.

Who this unit is for

This unit is recommended for those responsible for developing and managing relationships with an organisation's customers, but who may not necessarily be marketing or 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. Build and retain effective sales relationships
2. Devise sales strategies to suit procurement practices of key customers
3. Monitor and control relationship management activities

Details of these units can be accessed via <www.msssb.org>

CFAS18

Manage sales relationships with customers

Performance criteria

- You must be able to:*
- P1 identify and evaluate the criteria which your key customers use when selecting their suppliers, and the impact of such criteria upon your customer's procurement practices
 - P2 identify and prioritise customers with whom you want to build effective sales relationships
 - P3 establish existing and potential customer needs and expectations, and balance them with your organisation's sales strategy
 - P4 ensure that your organisation's products/services are matched clearly to customer needs and expectations
 - P5 identify opportunities to develop the relationship with your customer
 - P6 set up procedures and processes to support the monitoring and control of product/service support, in agreement with key customers
 - P7 seek and collect customer feedback about your organisation's provision of products/ services, to ensure that the required quality and consistency of service is being maintained
 - P8 identify key strengths and weaknesses of the relationship, and activities designed to build on the strengths and to address weaknesses
 - P9 deal with customer complaints or problems and provide suitable sales solutions
 - P10 monitor and evaluate relationships with customers on a regular basis
 - P11 maintain up to date details of your customers, including a record of contacts and transactions made

CFAS18

Manage sales relationships with customers

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 how to identify and prioritise effectively customers with whom your organisation should be building long-term and profitable relationships
- K2 how to communicate with key customers effectively in order to develop trust, commitment and co-operation
- K3 how to negotiate effectively with customers to establish a mutually beneficial financial outcome from the relationship
- K4 methods for monitoring and evaluating customer relationships
- K5 principal methods and processes for obtaining customer feedback
- K6 Ways of influencing others to respond to customer feedback and improve levels of service
- K7 the importance of maintaining up to date records of customer contact details, and of transactions made

You need to know and understand:

Industry/sector specific knowledge and understanding

- K8 legal, ethical and corporate social responsibility requirements for customer relationships in your sector

You need to know and understand:

Context specific knowledge and understanding

- K9 the focus of the sales plans, targets and sales objectives
- K10 the contribution that customer relationships make to the achievement of your organisation's aims
- K11 your organisation's practices relating to monitoring and controlling key customer activities
- K12 methods for managing sales support and customer service improvements
- K13 the limits of your authority in relation to managing a customer relationship

CFAS18

Manage sales relationships with customers

Additional Information

Behaviours

1. You seek to improve performance continuously
2. You accept criticism of your organisation and are proactive in providing solutions
3. You influence colleagues to improve customer service as a result of monitoring and control activities
4. You demonstrate integrity and ethical behaviour at all times

CFAS18

Manage sales relationships with customers

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S18

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; Social sciences; Geography; Sociology and social policy; Politics; Economics;

CFAS18

Manage sales relationships with customers

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

CFAS18

Manage sales relationships with customers

Suite

Marketing and Sales Standards for non-specialists

Key words

manage sales relationships with customers

Overview

This unit is about providing an effective after-sales service to your organisation's customers. As well as ensuring that customer after-sales management programmes fulfil requirements, it includes ensuring that products/services are delivered as agreed, and addressing any after-sales queries and problems effectively.

Who this unit is for

This unit is recommended for those responsible for providing after-sales service, but who may not necessarily be marketing or 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. Monitor the delivery of products
2. Meet your customer's after sales service needs
3. Build and deliver customer service and customer care support
4. Contribute to the development of sales support and customer management programmes

Details of these units can be accessed via <www.msssb.org>

CFAS19

Provide after sales support

Performance criteria

You must be able to:

- P1 develop customer care programmes, identifying your organisation's service provision, standards and nominated points of contact
- P2 establish and maintain communications with key customers regarding the ongoing customer service and care provided by your organisation
- P3 develop processes to monitor and evaluate customer and sales support which involve key customers, enabling the joint monitoring of your organisation's customer relationships
- P4 ensure that products/services are prepared and delivered to customers in accordance with agreed terms and conditions
- P5 check customer satisfaction with products/services delivered
- P6 address all customer queries and problems promptly, investigating and establishing the circumstances of such queries and problems, using your findings to inform measures designed to reduce the probability of any recurrence
- P7 address customer queries and problems to the satisfaction of all relevant parties wherever possible, balancing customer needs with those of your organisation
- P8 maintain accurate and complete records of products/services delivered, and of any queries or complaints and the actions taken

CFAS19

Provide after sales support

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of effective after-sales support programmes and how to establish these
- K2 how sales support, and customer care and service, can add value to customer relationships
- K3 internal and external pressures upon customer-buyer relationships, and their impact upon sales support and customer service
- K4 techniques for addressing customer queries and problems, including how to manage difficult individuals
- K5 how to obtain and analyse data from customers relevant to managing effective customer care
- K6 how to address customer problems sensitively and constructively

You need to know and understand:

Industry/sector specific knowledge and understanding

- K7 legal, regulatory and ethical requirements relating to the provision of after-sales service within your industry/sector

You need to know and understand:

Context specific knowledge and understanding

- K8 your organisation's terms and conditions of sale including contractual arrangements with key customers
- K9 your organisation's customer service procedures, including those for addressing customer queries and complaints
- K10 after-sales services provided by key competitors
- K11 typical queries and problems that might be raised regarding your organisation's products/services
- K12 options and solutions available to resolve typical queries and problems
- K13 service level agreements, and how these are monitored and evaluated
- K14 The limits of your own authority when dealing with after-sales queries and problems, and to whom to refer should these be exceeded

CFAS19

Provide after sales support

Additional Information

Behaviours

1. You present information clearly, concisely and accurately
2. You listen actively, and ask questions to clarify understanding
3. You keep promises and honour commitments
4. You work to develop an atmosphere of professionalism and mutual trust

CFAS19

Provide after sales support

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSSB

Original URN S19

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;

CFAS19

Provide after sales support

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

CFAS19

Provide after sales support

Suite

Marketing and Sales Standards for non-specialists

Key words

provide after sales support

CFAS20

Evaluate the effectiveness of marketing and sales activities



Overview

This unit is about establishing, applying and monitoring measures which can be used to evaluate the effectiveness of marketing and sales activities for your organisation and its products/services.

Who this unit is for

This unit is recommended for those involved in marketing and selling activities, but are not necessarily marketing or 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:

Marketing unit

1. Lead the monitoring and evaluation of marketing performance

Sales unit

2. Monitor and evaluate sales team performance

Details of these units can be accessed via <www.msssb.org>?

CFAS20

Evaluate the effectiveness of marketing and sales activities

Performance criteria

- You must be able to:*
- P1 agree marketing and sales targets, and indicators of performance which are specific, realistic, measurable and which relate to your organisation's priorities
 - P2 monitor and evaluate regularly the outcomes of marketing and sales activities, and the work of those involved, against the targets and indicators agreed
 - P3 support colleagues in identifying and addressing any obstacles to achieving marketing and sales targets
 - P4 identify any areas of underperformance, discuss and agree the causes with those involved, and establish those actions necessary to address these
 - P5 recognise successful completion of significant marketing and sales activities, and the achievement of targets, by individuals and teams
 - P6 demonstrate the contribution made to financial performance derived from key marketing and sales activities
 - P7 use the indicators and outcomes to inform and improve future marketing and sales activities

CFAS20

Evaluate the effectiveness of marketing and sales activities

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the importance of monitoring and evaluating the impact of marketing and sales activities upon an organisation's financial performance
- K2 measures of financial performance appropriate to monitoring marketing and sales activities, and the performance of those involved
- K3 the importance of consulting with relevant colleagues in developing targets and indicators of performance
- K4 performance management techniques appropriate for monitoring success in achieving marketing and sales targets by those involved in marketing and selling activities
- K5 effective practice in providing constructive feedback and gaining commitment to improvement in performance
- K6 the importance of promoting the success of marketing and sales activities

You need to know and understand:

Industry/sector specific knowledge and understanding

- K7 legal, regulatory and ethical requirements impacting upon marketing and sales activities in your organisation's sector, including the impact upon your organisation's social/corporate responsibility

You need to know and understand:

Context specific knowledge and understanding

- K8 the business aims of your organisation and how marketing and sales activities relate to this
- K9 your organisation's products/services, and related marketing and sales activities and targets
- K10 available resources for marketing and sales activities
- K11 key performance indicators used by your organisation, and their application when measuring the performance of marketing and sales activities, and those involved with them

CFAS20

Evaluate the effectiveness of marketing and sales activities

Additional Information

Behaviours

1. You identify and work in partnership with people who can provide support for your own
2. You agree what is expected of others and hold them to account
3. You make time available to support others
4. You present information clearly, concisely and accurately

CFAS20

Evaluate the effectiveness of marketing and sales activities

Developed by	Skills CFA
---------------------	------------

Version number	1
-----------------------	---

Date approved	November 2007
----------------------	---------------

Indicative review date	November 2009
-------------------------------	---------------

Validity	Current
-----------------	---------

Status	Original
---------------	----------

Originating organisation	MSSSB
---------------------------------	-------

Original URN	S20
---------------------	-----

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;
-----------------------------	---

CFAS20

Evaluate the effectiveness of marketing and sales activities

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

CFAS20

Evaluate the effectiveness of marketing and sales activities

Suite

Marketing and Sales Standards for non-specialists

Key words

evaluate the effectiveness of marketing and sales activities

Overview

This unit is about managing a small team of marketing/sales personnel, and includes providing leadership, direction as well as supporting, encouraging and motivating the team towards achievement of its objectives. It also includes planning and recruiting appropriate personnel.

Who this unit is for

This unit is recommended for those responsible for managing a small marketing/sales team, but who are not necessarily a marketing/sales specialist themselves. 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:

Marketing units

1. Lead marketing/marketing communications teams
2. Recruit, select, and keep marketing colleagues
3. Plan the marketing workforce

Sales units

4. Lead a sales team
5. Motivate sales professionals and sales partners
6. Recruit sales team members

Details of these units can be accessed via <www.msssb.org>

CFAS21

Manage your marketing and sales team

Performance criteria

- You must be able to:*
- P1 establish a direction and purpose for marketing/sales and communicate it clearly and enthusiastically, working with your team to agree the supporting strategy, objectives and plans
 - P2 ensure that people working within your team understand and can see how the direction, purpose and plans link to the overall objectives of your organisation
 - P3 involve team members in planning how the team will achieve its objectives
 - P4 ensure that each member of the team has personal work objectives and targets, taking into account individual strengths and weaknesses
 - P5 develop a range of leadership styles and select and apply them to appropriate situations and people
 - P6 identify the type of skills, knowledge, understanding and experience required to undertake current and planned marketing/sales activities
 - P7 make sure that your organisation has a marketing/sales workforce which provides a suitable mix of people to achieve its objectives
 - P8 identify and review the options for addressing any identified shortfalls in resource requirements and decide on the best option(s) to follow
 - P9 seek and make use of specialist expertise in relation to recruiting, selecting and keeping colleagues, where necessary
 - P10 talk with colleagues who are leaving your area of responsibility to identify and discuss their reasons for leaving
 - P11 encourage and recognise creativity and innovation by the team, motivate team members to present their own ideas and listen to what they say
 - P12 encourage, coach and support team members to achieve their personal work objectives and targets
 - P13 motivate and support people across your team to achieve their work and development objectives and provide recognition when they are successful
 - P14 empower people in your team to develop their own ways of working, and to take their own decisions within agreed boundaries
 - P15 encourage people to give a lead in their own areas of expertise and show willingness to follow this lead

CFAS21

Manage your marketing and sales team

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 a range of different leadership styles and how to select and apply these to different situations and people
- K2 types of difficulties and challenges that may arise, including conflict within the team, and ways of identifying and overcoming them
- K3 how to empower people effectively
- K4 the importance of recognising performance and how to select and apply successfully different methods for encouraging, motivating and supporting people and recognising achievement
- K5 the range of financial and non-financial incentives and motivational tools available to motivate members of the team
- K6 how to carry out appraisals and regular performance assessments in order to judge the levels of personal motivation in the team
- K7 team building techniques that support motivation and the building of team performance
- K8 the information required to undertake workforce planning
- K9 potential causes and effects of high and low staff turnover, and measures which can be undertaken to address staff turnover problems
- K10 recruitment and selection methods available, and their associated advantages and disadvantages
- K11 the importance of employment contracts, including clauses to protect against disclosure of company plans and related confidential information
- K12 sources of specialist expertise in relation to workforce planning, recruitment and selection, and how to make use of them

You need to know and understand:

Industry/sector specific knowledge and understanding

- K13 legal, regulatory and ethical requirements in your industry/sector impacting upon managing teams, including recruitment

You need to know and understand:

Context specific knowledge and understanding

- K14 how the marketing/sales team fits within your organisation, its current and desired range of influence and the reasons for any gap between the current and desired states
- K15 your own strengths and limitations in the leadership role
- K16 the strengths, limitations and potential of people that you lead
- K17 the objectives and operational plans for your area of responsibility
- K18 types of support and advice that people are likely to need and how to respond to these
- K19 local employment market conditions
- K20 employment policies and practices within your organisation, including recruitment, selection, induction, development, promotion, retention,

CFAS21

Manage your marketing and sales team

redundancy, dismissal, pay and other terms and conditions

CFAS21

Manage your marketing and sales team

Additional Information

Behaviours

1. You make time available to support others
2. You show integrity, fairness and consistency in decision-making
3. You are equitable when dealing with team members, show awareness of equal opportunities and recognise diversity within the team

CFAS21

Manage your marketing and sales team

Developed by Skills CFA

Version number 1

Date approved November 2007

Indicative review date November 2009

Validity Current

Status Original

Originating organisation MSSB

Original URN S21

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;

CFAS21

Manage your marketing and sales team

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

CFAS21

Manage your marketing and sales team

Suite

Marketing and Sales Standards for non-specialists

Key words

manage your marketing and sales team