



Level 5 Award in Sales Management (5A12)

500/3689/0

Syllabus

Programme Overview

The Level 5 Award in Sales Management is a programme based on Sales Management (SM) and is both a standalone Award and a contribution of credits towards the Certificate and Diploma in Sales Management.

Candidates can choose whether they wish to study for the Diploma immediately, or whether they would prefer to start with the Award, gain the credits, go on to the Certificate later, gain the credits and then study for the Diploma at a later date.

Achievement at Level 5 reflects the ability to identify and use relevant understanding, methods and skills to address problems that are well-defined but complex and non-routine. It includes taking responsibility for overall courses of action as well as exercising autonomy and judgement within broad parameters. It also reflects understanding of different perspectives or approaches within an area of study or work.

The syllabus states the Learning Outcomes and Indicative Content for the Level 5 Award in Sales Management Unit, Unit 2.

All five Units that make up the Diploma in Account Management/Diploma in Sales Management are mapped against the Marketing and Sales Standards Setting Body (MSSSB) standards, and the Qualifications and Curriculum Authority (QCA) Key Skills criteria:

- Communication (C)
- Application of number (N)
- Information technology (IT)
- Working with others (WO)
- Improving own learning and performance (LP)
- Problem solving (PS)

Structure

Candidates completing Unit 2 successfully will receive the Level 5 Award in Sales Management.

Unit 2 Sales Management and Leadership

Guided Learning Hours (GLH) and Notional Learning Hours (NLH)

Guided Learning Hours are those hours either in class or guided by the tutor/trainer e.g. through taught classroom sessions, or exercises to be completed in workbooks or perhaps a distance learning package with assessments; Guided Learning Hours do not include the formal assessments (end of Unit assessments or Investigative Project in Sales and Marketing). Notional Learning Hours include all of the above plus all formal assessments.

Level 5 Award in Sales Management

The Level 5 Award in Sales Management consists of one Unit, Unit 2, with one end of Unit assessment internally marked and externally moderated by the ISMM. The Level 5 Award in Sales Management has 60 Guided Learning Hours and 120 Notional Learning Hours.

ISMM L5 Award Overview

	Unit 1 60 GLH	Unit 2 60 GLH	Unit 3 70 GLH	Unit 4 70 GLH	Unit 5 IPSM 5 GLH
ISMM L5 Award in Sales Management		✓			

Aims and Objectives

The Level 5 Diploma in Sales Management qualifications aim to give practising or potential Sales Managers the foundation for their formal development in this role. The course has two primary objectives:

- 1 To assist entrants in gaining the knowledge required by Sales Managers.
- 2 To develop management skills.

Entry Requirements

Entrants will normally be either practising or aspiring Sales Managers. Whilst there are no formal educational requirements, entrants should have a background that will enable them to benefit from the course. The course is highly recommended for candidates holding the ISMM Level 4 qualification in Sales and Marketing. Where intending learners do not have the required level of literacy and numeracy, Centres may provide support before the start of the course. Sponsored and unsponsored learners are equally eligible.

Progression

Successful candidates who complete the full suite of qualifications at Level 5 may benefit from career enhancement or may progress to any of the further qualifications listed below, according to their circumstances:

- Level 5 Certificate and Diploma in Sales and Account Management
- Level 6 Executive Diploma in Strategic Sales and Account Management
- MA in Sales Management
- MSc in Sales Management
- any other qualification at a suitable level within or outside the National Qualifications Framework

Learning and Development

The total Guided Learning Hours (GLH) for the Award in Sales Management is 60 GLH. Assessment time and self study would be additional to these GLH. The total Notional Learning Hours (NLH) for the Award in Sales Management are 130 NLH; this includes assessment time and self study.

The qualification structure allows the use of flexible modes of delivery to suit the requirements of candidates, sponsors and centres. Course delivery may include elements of open, distance and/or online learning.

Assessment

To achieve an Award in Sales Management, each candidate must complete to a national standard the assessment for Unit 1 (AM). Candidates may choose to complete the Award, Certificate and Diploma as they wish; the credits gained will be banked by the ISMM. The internally marked, externally moderated end of Unit assignment is specified by the ISMM (and will make up 100% of the total assessment).

Any live work task that meets the criteria of the assessment would be acceptable and would not require the candidate to redo specifically for assessment. The tutor would be required to verify the authenticity of this evidence with the candidate before submitting the marks for it.

Candidates must note that registration lasts for two years, after that date re-registration will be necessary.

Equality of Opportunity

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

- ensure access and equality of opportunity wherever possible without affecting the integrity of the qualification;
- not create unnecessary barriers to achievement;
- guarantee fair assessment for all candidates, including those with particular assessment requirements.

Centres should refer to the latest copy of the ISMM Qualification Administration Handbook for guidance on arrangements for reasonable adjustments and special consideration.

Where work is externally marked, any special circumstances should be notified to the ISMM using the Special Consideration form. The advice of the ISMM should be sought as early as possible in the course.

Unit 2 Sales Management and Leadership

Introduction

The Unit covers sales management and leadership for Sales Managers. This Unit must be completed successfully in order to achieve the ISMM Level 5 Award in Sales Management. This Unit has 60 GLH.

Aims of the Unit

To define leadership styles in management and build quality teams; to measure performance, motivate and develop the team; to increase confidence in successful selling; to investigate best practice in selection, recruitment and retention; to measure performance and coach for improvement and to prepare and present proposals and quotations to customers for the supply of products and services

Assessment

The Unit will be assessed by a work-based presentation (WBP) which represents 100% of the overall assessment

Rationale

Candidates are encouraged to develop their learning throughout the duration of the Unit. Candidates must demonstrate their understanding of best practice in team and territory management, evaluate the key performance indicators of the sales team, and establish, maintain and enhance excellent communication in relationships with customers.

Unit 2 Sales Management and Leadership

<i>Learning outcomes</i>		<i>Indicative content</i>	
On completion of this Unit the candidate should be able to:			
2.1	Plan and manage continuing professional development (CPD)	2.1.1	Learning needs; continuous personal development (CPD) and improvement; life-long learning; self-assessment; study skills Prepare a personal development plan and/or an individual learning plan and manage as a project throughout each Unit studied
2.2	Manage organisational objectives and requirements	2.2.1	Organisational objectives and requirements Managing growth and market share: analyse current position and climate; forecasting sales turnover in relation to growth objectives; planning physical and human resources; competitive strategy and positioning Managing profitability: efficient and effective application of resources; short term profitability in relation to long term objectives Managing service levels: quality and customer care objectives; setting standards and monitoring performance
		2.2.2	Setting salesforce objectives Revenues: profit contribution; market share; customer satisfaction; customer service; expenses Determine sales strategy Set performance standards: company; regions; products; salespeople; accounts Measure results and compare with standard Action to improve performance
2.3	Compare and contrast leadership and management styles in sales and marketing	2.3.1	Leadership styles: coercive; authoritative; affiliative; democratic; pacesetting; coaching
		2.3.2	Empowerment through leadership The key steps: share organisational information; learn to use vision and values to support a new culture of empowerment; teams to replace hierarchy as decision makers; developing objectives; individual accountability versus leadership responsibility; delegating authority vs. retaining control

Unit 2 Sales Management and Leadership

Learning outcomes

On completion of this Unit the candidate should be able to:

Indicative content

- 2.3.3** Setting standards and monitoring performance
 - Saliency – what is important to customers
 - Relative performance
 - Direction of travel – the trend in performance whether positive or negative
- 2.3.4** Management plans that link to organisational strategy:
 - Organisational and management structure and sales team organisation
 - Reporting structures
 - Numbers in sales teams
 - Management teams
 - Internal support
 - Marketing support
- 2.3.5** Territory planning
 - Geographical area
 - Territory analysis
 - Product type
 - Portfolio analysis
 - Customer type
 - Account size
 - Market Centred
 - New/existing account
 - Functional specialisation
 - Mixed organisation
 - Account management
- 2.3.6** Selection of the best method of territory planning for the organisation: the needs of customers; the needs of the organisation; balancing profitability with service standards; the combined approach

Unit 2 Sales Management and Leadership

<i>Learning outcomes</i>		<i>Indicative content</i>
On completion of this Unit the candidate should be able to:		
		<p>2.3.7 Business levels/service levels establishing and monitoring Product application vs. product knowledge Essential for profitability Meets customers' needs</p> <p>2.3.8 Balance of new business Identification of new/existing account structure</p>
2.4	Investigate HR planning for Sales Managers	<p>2.4.1 HR planning: Recruitment, selection and retention Induction and training Measure performance Appraisal Training, coaching and mentoring Establish desired and required ways of working Capacity to set effective and understandable procedures Ongoing and proactive training structure</p> <p>2.4.2 Recruitment, selection and retention: budgeting for costs and expenditure job description; personnel specification; job advertisement; CVs and application forms; interviews</p> <p>2.4.3 Induction training and measuring performance Performance appraisal Personal development plans Sales contests; meetings between managers and teams/individuals; sales quotas or targets</p> <p>2.4.4 Identify and analyse ongoing training needs Training, coaching and mentoring in sales – ASK (attitude, skills, knowledge) Measures of performance in the team: qualitative; quantitative Performance review and appraisal Personal development plans Training needs analysis</p>

Unit 2 Sales Management and Leadership

Learning outcomes

On completion of this Unit the candidate should be able to:

Indicative content

- Product and process training
- Competency based training
- Group training sessions
- Individual coaching
- Evaluating training and reassessing priorities
- Identification of skills and attributes
- Identification of critical activities
- 2.4.5** Achieving training objectives
- Distinguish between similar products and services
- Group products to form a business solution
- The educated buying population
- Mastering the art of consultative selling
- Managing a team selling approach
- Knowing the customer's business
- Personal development planning
- 2.4.6** Grievance and disciplinary procedures
- Timescales for meetings
- Details of who will discuss matters with employees
- Details of who will investigate claims
- Different procedures according to seriousness of breach
- Appropriate action depending on case
- Length of time notes remain on file
- Procedures for gross misconduct, suspension and dismissal
- Procedures for appeal by employee

Unit 2 Sales Management and Leadership

<i>Learning outcomes</i>		<i>Indicative content</i>	
On completion of this Unit the candidate should be able to:			
2.5	Examine the role of motivation techniques and skills and the links to training and development	2.5.1	Building powerful rapport; harmony; recognition; support; body language; gesture; facial expression – links between rapport, perception and communication
		2.5.2	Motivating individuals: Maslow; Herzberg; McGregor; Goleman; Vroom; Likert Identification of personal goals Identification of motivational syntax Linking incentives to personal goals and motivational syntax
		2.5.3	Motivating teams Methods of conducting sales meetings Group method Monopolist Motivation>Effort>Performance>Rewards>Satisfaction Rewards, incentives and remuneration – the compensation strategy
		2.5.4	The key motivators: job satisfaction; performance against peers: achieving goals/targets; support; money; status; fear of dismissal; merit-based promotion; participation in setting targets; customer satisfaction
		2.5.5	Motivating teams Methods of conducting sales meetings Group method Monopolist Motivation>Effort>Performance>Rewards>Satisfaction
		2.5.6	Rewards, incentives and remuneration – the compensation strategy The reward package: financial incentives; non-financial incentives Basic salary Commission Bonuses Travel and sundry expenditure Fringe benefits

Unit 2 Sales Management and Leadership

<i>Learning outcomes</i>		<i>Indicative content</i>	
On completion of this Unit the candidate should be able to:			
2.6	Develop quality teams and individuals to enhance performance	2.6.1	Identify the development needs of teams and individuals Belbin questionnaire Myers-Briggs Type Indicator
		2.6.2	Plan the development of teams and individuals Adair's Task/Team/Individual model Complimentary strengths and weaknesses Provide a vision Agree team objectives
2.7	Organise teams to sell products and services at trade fairs, exhibitions and conferences	2.7.1	Sales demonstrations; point of sale; business cards Planning and preparation of promotion, equipment, self and team Health and Safety Liability Insurance
2.8	Develop, audit and renew networks of existing and prospective customers	2.8.1	Development and business retention Network development Numbers of new customers contacted Records of existing networks used to gain customer contact
		2.8.2	Customer satisfaction/complaint monitoring and handling
		2.8.3	Identifying and meeting customer needs Needs analysis approach Manage customer service levels
2.9	Demonstrate an understanding of products and services that measure and achieve quality objectives	2.9.1	Gaps: between perceptions, expectations, standards, measurements Key service dimensions
		2.9.2	Compare and contrast Kaizen (continuous or incremental change) and breakthrough change (business process re-engineering)

Unit 2 Sales Management and Leadership

<i>Learning outcomes</i>		<i>Indicative content</i>
On completion of this Unit the candidate should be able to:		
		<p>2.9.3 Benchmarking and standards as a management tool in sales and marketing Internal benchmarking: analysis of internal processes; selecting performance indicators; identifying best companies to benchmark Competitor's benchmarking: gathering data; analysing gaps; performance mapping Benchmarking and knowledge management Quality systems: International Standardisation Organisation (ISO); British Standards Institution (BSI); European Foundation for Quality Management (EFQM); Total Quality Management (TQM).</p> <p>2.9.4 Decision making; decision tree; generating solutions; monitor and evaluate</p> <p>2.9.5 Complex decision making Problem solving in dynamic, complex and semi opaque situations</p>
2.10	Facilitate and control meetings	<p>2.10.1 Communicate with the customer, the team, with groups Objectives and agendas Impact and influence Controlling digressions Giving sufficient information to allow others to contribute effectively Summarising and follow-ups Plans of action</p>
2.11	Organise, plan and use time to achieve optimum effectiveness and efficiency	<p>2.11.1 Time Management: priority, urgency, work/life balance Tools of time management</p> <p>2.11.2 Route Planning: territories, alternative routes Tools of route planning: digital systems; geographical/post code systems</p>

Unit 2 Assessment

The Unit will be assessed by a work-based presentation (WBP); internally marked and externally moderated.

Represents 100% of overall assessment