



## **Level 5 Certificate in Account Management (5C11)**

500/3663/4

Syllabus

## Programme Overview

The Level 5 Certificate in Account Management is a programme based on Account Management (AM) and is both a stand-alone Certificate and a contribution of credits towards the Diploma in Account Management and the Diploma in Account Management and 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.

This syllabus states the Learning Outcomes and Indicative Content for the Level 5 Certificate in Account Management Units, Unit 1 and Unit 3.

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**

Unit 1 is specific to Account Management, Unit 3 is a shared Unit for Account Managers and Sales Managers. Candidates completing Unit 1 and Unit 3 successfully will receive the Level 5 Certificate in Account Management. Candidates who go on to complete the shared Units 4 and 5 successfully will receive the Level 5 Diploma in Account Management qualification. Unit 2 is specific to Sales Management.

Candidates who have previously completed Unit 1 have banked the credits. Candidates completing the two Units successfully (Unit 1, and Unit 3) will receive the Level 5 Certificate in Account Management.

**Unit 1 Account Management Principles and Practice**  
**Unit 3 Account Management and Sales Management**

## **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 Certificate in Account Management**

The Level 5 Certificate in Account Management consists of two Units, Unit 1 and Unit 3. Where the Unit 1 Award has been successfully completed there is no requirement to resit the Unit 1 assessment i.e. the candidate 'banks' the credits and adds to them by completing Unit 3. The Level 5 Certificate in Account Management has 130 Guided Learning Hours and 260 Notional Learning Hours.

## ISMM Level 5 Certificate Overview

	Unit 1 60 GLH	Unit 2 60 GLH	Unit 3 70 GLH	Unit 4 70 GLH	Unit 5 IPSM 5 GLH
ISMM L5 Certificate in Account Management	✓		✓		

### Aims and Objectives

The Level 5 Certificate in Account Management qualification aims to give practising or potential Account Managers the foundation for their formal development in this role. The course has two primary objectives:

To assist entrants in gaining the knowledge required by Account Managers.

To develop management skills.

### Entry Requirements

Entrants will normally be either practising or aspiring Account 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 Diploma in Account Management and Sales 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

Total GLH for the Certificate in Account Management is 130 GLH. Assessment time and self study would be additional to these GLH.

The total Notional Learning Hours (NLH) for the Award in Account Management are 130 NLH. The Certificate in Account Management NLH are estimated to be 260 NLH.

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 a Certificate in Account Management, each candidate must complete to a national standard the assessments for Unit 1 and Unit 3. Candidates may choose to complete the Award, Certificate and Diploma as they wish; the credits gained will be banked by the ISMM. The two end of Unit assignments are specified by the ISMM (and will each make up 50% 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 1 Account Management Principles and Practice**

## **Introduction**

The Unit establishes strategies for key account managers and other account managers. This Unit must be completed successfully in order to achieve the ISMM Level 5 Award in Account Management. This Unit has 60 GLH.

## **Aims of the Unit**

To identify and understand account needs; to manage activities to meet customer and organisational requirements; to prepare proposals/tenders/bids for the supply of products and services and to develop strong relationships and increase business with the customer.

## **Assessment**

The Unit will be assessed by a negotiation role play which represents 50% of the overall assessment.

## **Rationale**

Candidates are encouraged to develop their learning throughout the duration of the Unit. Candidates must demonstrate that they can develop productive working relationships, provide information to support decision making, optimise opportunities for the sale of products and services to customers, and prepare tenders for the supply of products and goods. Candidates are expected to establish and demonstrate best practice in Account Management from both a developmental and practical point of view

# Unit 1 Account Management Principles and Practice

## *Learning outcomes*

## *Indicative content*

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

<b>1.1</b>	Plan and manage continuing professional development (CPD)	<b>1.1.1</b>	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
<b>1.2</b>	Define Account Management (AM) and the management of organisational objectives and requirements	<b>1.2.1</b>	AM is management of the future: business objectives; market opportunities; business resources
		<b>1.2.2</b>	AM is building relationships Pre-KAM; early-KAM; mid-KAM; partnership-KAM; synergistic-KAM
		<b>1.2.3</b>	AM – a long term series of investments The criteria for an account is: A profit centre Worth a high value per annum to the organisation A resource requirement A point of focus for whole organisation Worth extra effort for extra returns More demanding A vehicle to take your business where you want to go
		<b>1.2.4</b>	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

## Unit 1 Account Management Principles and Practice

<i>Learning outcomes</i>		<i>Indicative content</i>	
On completion of this Unit the candidate will be able to:			
<b>1.3</b>	Selecting customers to meet business objectives	<b>1.3.1</b>	The development of profiling strategies to meet business objectives Customer requirements: your rating; competitor's ratings; target performance; action required Which customers offer the most profitability by sales volume? Which customers offer the most potential for profitability by sales volume?
		<b>1.3.2</b>	Account identification and selection matrix (KAISM) Shell directional policy matrix GE matrix Customer attractiveness against relative strength
		<b>1.3.3</b>	Develop customer loyalty by: Identifying customer needs and matching products and services accordingly Acting on knowledge at all levels of the customer operation Willingness to share risks for a share in rewards
		<b>1.3.4</b>	Identify competitive advantage The lowest cost supplier The differentiated supplier
		<b>1.3.5</b>	Establish which 'drivers' reflect customer values and identify: operational excellence; best value; product leadership; customer intimacy; customer feedback
		<b>1.3.6</b>	Identify actions needed to help customers' enhance values
		<b>1.3.7</b>	Research and information necessary for market and customer understanding: market chain; value chain; business strategy; value drivers; profiling; positioning; customer satisfaction; decision making process (DMP) and decision making Unit (DMU) members

## Unit 1 Account Management Principles and Practice

### *Learning outcomes*

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

**1.4** Determine the role of the manager in Account Management and develop an understanding of all aspects of the account's business

### *Indicative content*

- 1.4.1** From the account's perspective
  - Be the organisational contact into your company
  - Understand the business, market needs and competitive environment
  - Help develop market opportunities and identify new business challenges
  - Act with integrity and maintain a professional manner
- 1.4.2** Maintain a professional manner
  - Acting with integrity: transparency; honesty; consistency; loyalty
  - The ethical approach: corporate social responsibility; managing moral and ethical dilemmas
- 1.4.3** From the organisational perspective
  - Proactively develop more business with the customer
  - Establish strong relationships with the decision makers in the customer organisation
  - Create a wide awareness of your organisations' capabilities throughout the account
  - Profit from a mutually beneficial partnership
  - Focus on long term planning and the scope of lifetime profitability
  - Set objectives and strategies that will help growth
  - Design account plans to help structure planning
  - Develop specific market segments
- 1.4.4** Supplier status: identify current position; identify planned position and timescale
- 1.4.5** Negotiation:
  - Customer decision making styles
  - Interrelationships in the decision making process
  - Support in the DMU
  - Positive Impact Analysis (PIA)
  - Stages in customer activity
  - Potential problems for customers
  - Actions with positive impact that add value

# Unit 1 Account Management Principles and Practice

## *Learning outcomes*

## *Indicative content*

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

			Potential actions with positive impact that add value
			Cross-selling
			Up-selling
		<b>1.4.6</b>	Reduce risks to meet purchasing requirements
			Risk against relative spend
			Risk significance against total value
			Risk significance against trust and confidence
			Markets against products
			Marketing risk against financial risk
		<b>1.4.7</b>	Ensure that the account plan objectives relate to: new and existing account activity; value; lifetime profitability; volume; the short term and the long term
<b>1.5</b>	Design and implement an account plan	<b>1.5.1</b>	Approaches to developing account plans
			A team effort
			Members of an account team
			Account opportunities and objectives
			Objectives
			Future market opportunities
			Current business resources
		<b>1.5.2</b>	Communicating and tracking objectives, timescales and cost effective sales methods in line with the account's strategy
		<b>1.5.3</b>	Research information sources used to develop account plans: publications; customers; colleagues; Internet; MkIS system
		<b>1.5.4</b>	Identify resources that may be required for implementing the account plan: human; technological; financial; marketing; operational

## Unit 1 Account Management Principles and Practice

<i>Learning outcomes</i>		<i>Indicative content</i>	
On completion of this Unit the candidate will be able to:			
<b>1.6</b>	Identify and manage critical success factors for change	<b>1.6.1</b>	Critical success factors Identify internal obstacles to implementing account strategy Identify internal critical success factors Identify actions required and by whom to ensure critical success factors are met, to a timescale Use of a change equation in action planning: identify areas of dissatisfaction or obstacles; explore the shared vision; practical steps by people to a timescale
<b>1.7</b>	Explore benchmarking and standards as a management tool for Account Managers	<b>1.7.1</b>	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).
		<b>1.7.2</b>	Gaps: between perceptions, expectations, standards, measurements Key service dimensions
		<b>1.7.3</b>	Compare and contrast Kaizen (continuous or incremental change) and breakthrough change (business process re-engineering)

## Unit 1 Account Management Principles and Practice

<i>Learning outcomes</i>		<i>Indicative content</i>	
On completion of this Unit the candidate will be able to:			
<b>1.8</b>	Investigate HR planning for Account Management	<b>1.8.1</b>	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
		<b>1.8.2</b>	Recruitment, selection and retention: budgeting for costs and expenditure job description; personnel specification; job advertisement; CVs and application forms; interviews
		<b>1.8.3</b>	Induction training and measuring performance Performance appraisal Personal development plans
		<b>1.8.4</b>	Identify and analyse training needs Personal development plans Training, coaching and mentoring needs analysis Identification of skills and attributes Identification of critical activities
<b>1.9</b>	Examine coaching and mentoring for continuing personal development	<b>1.9.1</b>	Training, coaching and mentoring – ASK (attitude, skills, knowledge) Continuing personal development goals and plans Proactively research relationship opportunities Contracting for key deliverables between organisations Develop relationships with organisations' teams The GROW model

## Unit 1 Account Management Principles and Practice

### *Learning outcomes*

### *Indicative content*

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

			Evaluation and continuous improvement
<b>1.10</b>	Investigate effective leadership in Account Management	<b>1.10.1</b>	Establish desired and required ways of working through the provision of effective leadership in Account Management
		<b>1.10.2</b>	Develop appropriate culture, values, attitudes, and skills and expertise
		<b>1.10.3</b>	Compare organisational policies with those of others
<b>1.11</b>	Facilitate and control meetings	<b>1.11.1</b>	Communicating 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
<b>1.12</b>	Examine priority, urgency, the use of time and work/life balance	<b>1.12.1</b>	Organise, plan and use time to achieve optimum effectiveness and efficiency Time management: priority, urgency, work/life balance Tools of time management

## Unit 1 Assessment

Unit assessed by a sales negotiation role play internally assessed\* and externally moderated by video or .wmv file plus supporting evidence.

Represents 50% of overall assessment

## **Unit 3 Account Management and Sales Management**

### **Introduction**

The Unit examines regular sales activities. It examines the links between the salesperson and the customer and investigates the most profitable means of planning and organising sales activities and teams. It further investigates the operation of financial and statistical information in organisations. This Unit, in addition to Unit 1 for AM and Unit 2 for SM (the Award Units), must be completed in order to achieve the ISMM Level 5 Certificate in Account Management or the ISMM Level 5 Certificate in Sales Management. This Unit has 70 GLH.

### **Aims of the Unit**

To reflectively evaluate ethical issues and legislation in sales and marketing; manage change and resolve problems rapidly; consider the application of different sales models in developing a relationship selling approach; use information to make decisions and resolve problems; operate financial and statistical requirements and communicate effectively and analyse buyer behaviour.

### **Assessment**

The Unit will be assessed 100% by work-based report (WBR) and represents 50% of the overall assessment.

### **Rationale**

Candidates are encouraged to develop their learning throughout the duration of the Unit. Candidates must demonstrate that they can understand procurement practices of key customers, use information effectively, ensure legal and ethical requirements are met, organise teams and forecast and administer a sales budget.

## Unit 3 Account Management and Sales Management

### *Learning outcomes*

### *Indicative content*

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

<b>3.1</b>	Research ethical and legal issues that affect the individual, the salesforce and the organisation	<b>3.1.1</b>	Business, marketing, sales and management dilemmas
		<b>3.1.3</b>	Codes, practices and policies that influence the salesforce and marketing managers
		<b>3.1.3</b>	Standards of conduct, moral judgement, moral philosophy – right and wrong in salesforce management: bribery; deception; the hard sell; reciprocal buying
		<b>3.1.4</b>	The nature and extent of ethical problems facing business decision makers and corporate social responsibility (CSR)
		<b>3.1.5</b>	Consumer Protection Act 1987 Data Protection Act 1998 Supply of Goods and Services Act 1983 Health and Safety at Work Act 1974 plus other relevant legal requirements
		<b>3.1.6</b>	Employment rights from parental leave to flexible working arrangements Contracts of employment Terms and conditions
<b>3.2</b>	Discuss change management and implementation	<b>3.2.1</b>	The forces of change: Porter’s five forces Political issues Uncertain economic conditions Technological developments Flexibility in work location and management patterns Increased demand for quality
		<b>3.2.2</b>	Planning change Resistance to change: Organisational Team

## Unit 3 Account Management and Sales Management

### *Learning outcomes*

### *Indicative content*

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

			Individual Human and social factors in change and its management The change process Kübler-Ross change curve
<b>3.3</b>	Work with other business functions	<b>3.3.1</b>	The business functions and stakeholders and their interest in the organisation's aims and objectives
		<b>3.3.2</b>	The roles, responsibilities, interests and concerns of other business functions
		<b>3.3.3</b>	All functions to consider the organisation's consumers as central to organisational activities
		<b>3.3.4</b>	Procurement practices: Procedures and guidelines used in the tendering process in both public and private sectors and how such knowledge can be applied in the sales organisation
<b>3.4</b>	Develop a technical, creative and professional approach to complex and difficult problems	<b>3.4.1</b>	Problem identification Problem solving loop; brainstorming; force field analysis; fishbone analysis; causation web; decision making models
		<b>3.4.2</b>	The structure of formal and informal approaches to problem solving
		<b>3.4.3</b>	Coaching and mentoring Enabling the team to reach their potential Questioning techniques The GROW model Feedback Commitment to action and self-development Learning and development for improved performance

## Unit 3 Account Management and Sales Management

### *Learning outcomes*

### *Indicative content*

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

<b>3.5</b>	Prioritise information for sales planning and use information to make sales-related decisions	<b>3.5.1</b>	Information about customers and competitors from a variety of sources Use of such information to support planning and decision making Key stakeholder views about market developments and the implications for your organisation
		<b>3.5.2</b>	Market information to analyse customers, market potential and competitors Initial recommendations based on relevant marketing and sales information Marketing products or services Recommendations for improvement and change
<b>3.6</b>	Investigate relevant statistics to set, manage and administer sales budgets and evaluate the financial potential of customer accounts	<b>3.6.1</b>	Reporting systems available to contemporary organisations to include where relevant: Daily schedules Daily/weekly sales Enquiries/Prospects Walk books or canvass guides Lost business reports Competitor analysis Monthly sales reports Recruitment and retention Campaigns Expenses Absences Self certification of illness Return to work interviews Exit interviews
		<b>3.6.2</b>	Financial tools to assess and prioritise new accounts in order to measure potential value The lifetime value cash flow that will be generated if the customer maintains an average loyalty level

## Unit 3 Account Management and Sales Management

### Learning outcomes

### Indicative content

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

			<ul style="list-style-type: none"> <li>The sales volume required to achieve target profitability</li> <li>The value of each account using all available financial and qualitative evidence</li> <li>Stakeholder access to appropriate financial performance data</li> </ul>
<b>3.7</b>	Identify credit control and debt collection as part of the business process and part of customer relationships	<b>3.7.1</b> Credit control <b>3.7.2</b> Debt collection; debtors and agencies <b>3.7.3</b> Negotiation and the sales forecast and budget	
<b>3.8</b>	Compare and contrast excellence and quality for the organisation and the customer	<b>3.8.1</b> TQM and customer care TQM in formalising process and the importance of customer care Customer care plan to underpin the sales function Customer care and the selling process in terms of facilitating customer enquiries, customer support, general sales enquiries The links between customer care programmes and sales success <b>3.8.2</b> The SERVQUAL model – measuring service quality The makeup of SERVQUAL Gaps: between perceptions, expectations, standards, measurements The five key service dimensions	
<b>3.9</b>	Practice advanced and influential questioning and listening techniques in communication skills and build rapport	<b>3.9.1</b> Questions Escalate the value of questions to establish credibility Strategic questioning Managing and broadening scope and asking the right question at the right time The strategic questioning process, emotional vs. analytical questions: Status questions (analytical) Issue questions (analytical)	

## Unit 3 Account Management and Sales Management

### *Learning outcomes*

### *Indicative content*

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

			<ul style="list-style-type: none"> <li>Implication questions (emotional)</li> <li>Solution questions (emotional)</li> </ul>
		<b>3.9.2</b>	<ul style="list-style-type: none"> <li>Communicating with the customer, the team and other groups with impact and influence</li> <li>Precision language</li> <li>Communication styles: aggressive; assertive; non-assertive</li> <li>Formal communication within reporting structures</li> <li>Informal communication</li> <li>Sales meetings</li> <li>Contributing to sales meetings</li> <li>Conducting a management interview</li> </ul>
<b>3.10</b>	Assess the application of different sales models in developing a relationship selling approach	<b>3.10.1</b>	<ul style="list-style-type: none"> <li>Sales cycles and models:</li> <li>10-stage sales cycle</li> <li>Pre-sales, sales, post-sales</li> <li>Relationship selling</li> <li>Consultative selling</li> <li>Solution selling</li> <li>SPIN selling</li> <li>Neuro Linguistic Programming in selling:</li> <li>VAK (visual, auditory, kinæsthetic)</li> <li>Pre-suppositions</li> </ul>
<b>3.11</b>	Investigate the stages in the buying process in a Account Management/Sales Management context to manage activities to meet customer and organisational requirements	<b>3.11.1</b>	<ul style="list-style-type: none"> <li>Identify stages in the buying process:</li> <li>Unawareness</li> <li>Awareness</li> <li>Comprehension</li> <li>Conviction</li> </ul>

## Unit 3 Account Management and Sales Management

### *Learning outcomes*

### *Indicative content*

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

<b>3.11.2</b>		<b>3.11.2</b>	Purchase Buyer behaviour:the impact of the Internet; goods and services linking buyer and seller. Complex; dissonance; habitual; variety seeking; post-purchase behaviour; influencing factors; trust vs. price
<b>3.11.3</b>		<b>3.11.3</b>	Differences in marketing practices from the following perspectives: sales; business-to-consumer (B2C); business-to-business (B2B).
<b>3.11.4</b>		<b>3.11.4</b>	Negotiation: Options available to each party Quantity and quality of information held Identification and satisfaction of needs Identification of pressures on each party Objectives: must/intend/like Concession analysis Preparing a proposal or quotation Closing Confirming win/win Completing contractual formalities
<b>3.12</b>	Close and win the sale and prepare a proposal, tender or bid	<b>3.12.1</b>	The close: objections as opportunities; summary of needs; persuasion skills, agreement and outcomes; ask for the order Save the best concession until last Confirm win/win Highlight USPs Realistic competitive position Confirm action plan

## Unit 3 Account Management and Sales Management

### *Learning outcomes*

### *Indicative content*

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

Complete contractual formalities  
Proposals, tenders or bids to meet customer requirements  
The presentation of proposals, tenders or bids  
The offer: features; benefits; solutions; total business experience  
Total business experience focal point

### **Unit 3 Assessment**

Unit assessed by a 3000-word work-based report (WBR); internally marked and externally moderated.

Represents 50% of overall assessment