



Level 5 Certificate in Sales Management (5C12)

500/3665/8

Syllabus

Programme Overview

The Level 5 Certificate in Sales Management is a programme based on Sales Management (AM) and is both a standalone Certificate and a contribution of credits towards the Diploma in Sales 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 Sales Management Units, Unit 2 and Unit 3.

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

Candidates who have previously completed Unit 2 have banked the credits. Candidates completing the two Units successfully (Unit 2, and Unit 3) will receive the Level 5 Certificate in Sales Management.

Unit 2 Sales Management and Leadership

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 Sales Management

The Level 5 Certificate in Sales Management consists of two Units, Unit 2 and Unit 3. Where the Unit 2 Award has been successfully completed there is no requirement to resit the Unit 2 assessment i.e. the candidate 'banks' the credits and adds to them by completing Unit 3. The Level 5 Certificate in Sales Management has 130 Guided Learning Hours and 260 Notional Learning Hours

ISMM L5 Certificate Overview

	Unit 1 60 GLH	Unit 2 60 GLH	Unit 3 70 GLH	Unit 4 70 GLH	Unit 5 IP 5 GLH
ISMM L5 Certificate in Sales Management		✓	✓		

Aims and Objectives

The Level 5 Certificate in Sales Management qualification aims 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 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 Certificate in Sales Management is 130 GLH.

The Certificate in Sales 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 Sales Management, each candidate must complete to a national standard the assessments for Unit 2 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 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 100% by a work-based presentation (WBP) and represents 50% 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 will 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 will 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

Learning outcomes

Indicative content

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

		2.3.7	Business levels/service levels establishing and monitoring Product application vs. product knowledge Essential for profitability Meets customers' needs
		2.3.8	Balance of new business Identification of new/existing account structure
2.4	Investigate HR planning for Sales Managers	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
		2.4.2	Recruitment, selection and retention: budgeting for costs and expenditure job description; personnel specification; job advertisement; CVs and application forms; interviews
		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
		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

Unit 2 Sales Management and Leadership

Learning outcomes

Indicative content

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

		<ul style="list-style-type: none"> 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
		<ul style="list-style-type: none"> 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
		<ul style="list-style-type: none"> 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
2.5	Examine the role of motivation techniques and skills and the links to	<ul style="list-style-type: none"> 2.5.1 Building powerful rapport; harmony; recognition; support; body language; gesture; facial expression – links between rapport, perception and communication

Unit 2 Sales Management and Leadership

Learning outcomes

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

Indicative content

- 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 will 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

Learning outcomes

Indicative content

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

2.10	Facilitate and control meetings	<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>
2.11	Organise, plan and use time to achieve optimum effectiveness and efficiency	<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> <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 through a work-based presentation (WBP) internally assessed and externally moderated.

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

<i>Learning outcomes</i>		<i>Indicative content</i>	
On completion of this Unit the candidate should be able to:			
3.1	Research ethical and legal issues that affect the individual, the salesforce and the organisation	3.1.1	Business, marketing, sales and management dilemmas
		3.1.3	Codes, practices and policies that influence the salesforce and marketing managers
		3.1.3	Standards of conduct, moral judgement, moral philosophy – right and wrong in salesforce management: bribery; deception; the hard sell; reciprocal buying
		3.1.4	The nature and extent of ethical problems facing business decision makers and corporate social responsibility (CSR)
		3.1.5	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
		3.1.6	Employment rights from parental leave to flexible working arrangements Contracts of employment Terms and conditions
3.2	Discuss change management and implementation	3.2.1	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
		3.2.2	Planning change Resistance to change: Organisational Team Individual

Unit 3 Account Management and Sales Management

Learning outcomes

Indicative content

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

			Human and social factors in change and its management The change process Kübler-Ross change curve
3.3	Work with other business functions	3.3.1	The business functions and stakeholders and their interest in the organisation's aims and objectives
		3.3.2	The roles, responsibilities, interests and concerns of other business functions
		3.3.3	All functions to consider the organisation's consumers as central to organisational activities
		3.3.4	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
3.4	Develop a technical, creative and professional approach to complex and difficult problems	3.4.1	Problem identification Problem solving loop; brainstorming; force field analysis; fishbone analysis; causation web; decision making models
		3.4.2	The structure of formal and informal approaches to problem solving
		3.4.3	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
3.5	Prioritise information for sales planning and use information to make sales-related decisions	3.5.1	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

Unit 3 Account Management and Sales Management

Learning outcomes

Indicative content

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

		organisation
		3.5.2 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
3.6	Investigate relevant statistics to set, manage and administer sales budgets and evaluate the financial potential of customer accounts	3.6.1 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
		3.6.2 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 The sales volume required to achieve target profitability The value of each account using all available financial and qualitative evidence Stakeholder access to appropriate financial performance data

Unit 3 Account Management and Sales Management

<i>Learning outcomes</i>		<i>Indicative content</i>	
On completion of this Unit the candidate should be able to:			
3.7	Identify credit control and debt collection as part of the business process and part of customer relationships	3.7.1	Credit control
		3.7.2	Debt collection; debtors and agencies
		3.7.3	Negotiation and the sales forecast and budget
3.8	Compare and contrast excellence and quality for the organisation and the customer	3.8.1	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
		3.8.2	The SERVQUAL model – measuring service quality The makeup of SERVQUAL Gaps: between perceptions, expectations, standards, measurements The five key service dimensions
3.9	Practice advanced and influential questioning and listening techniques in communication skills and build rapport	3.9.1	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) Implication questions (emotional) Solution questions (emotional)
		3.9.2	Communicating with the customer, the team and other groups with impact and influence Precision language Communication styles: aggressive; assertive; non-assertive

Unit 3 Account Management and Sales Management

<i>Learning outcomes</i>		<i>Indicative content</i>	
On completion of this Unit the candidate should be able to:			
3.10	Assess the application of different sales models in developing a relationship selling approach	3.10.1	Formal communication within reporting structures Informal communication Sales meetings Contributing to sales meetings Conducting a management interview Sales cycles and models: 10-stage sales cycle Pre-sales, sales, post-sales Relationship selling Consultative selling Solution selling SPIN selling Neuro Linguistic Programming in selling: VAK (visual, auditory, kinæsthetic) Pre-suppositions
3.11	Investigate the stages in the buying process in a Account Management/Sales Management context to manage activities to meet customer and organisational requirements	3.11.1	Identify stages in the buying process: Unawareness Awareness Comprehension Conviction Purchase
		3.11.2	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
		3.11.3	Differences in marketing practices from a sales, business-to-consumer (B3C) and business-to-business (B3B) perspective

Unit 3 Account Management and Sales Management

Learning outcomes

Indicative content

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

3.12	Close and win the sale and prepare a proposal, tender or bid	<p>3.11.4 Negotiation:</p> <ul style="list-style-type: none"> 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 <p>3.12.1 The close: objections as opportunities; summary of needs; persuasion skills, agreement and outcomes; ask for the order</p> <ul style="list-style-type: none"> Save the best concession until last Confirm win/win Highlight USPs Realistic competitive position Confirm action plan 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
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Unit 3 Assessment

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

Represents 50% of overall assessment