ISP Level 5 Certificate & Diploma in Advanced Sales Professionalism

15.4 Sales & Marketing

[603/5902/X](603/5902/X)

[603/5903/1](603/5903/1)

Qualification Specification

Level 5

Contents

Change Control

Summary of changes to this specification since last publication date

Version	Publication date	Summary of change
2.0	Feb-22	Full refresh and rebrand from original APS Qual Spec

Introduction

This qualification specification outlines all you need to know to deliver this qualification as an Approved Training Provider of the Institute for Sales Professionals (ISP) and should be read in conjunction with ISP Approved Training Provider Guide.

You should always ensure you are using the most recent version of this specification, please check ISP website or speak to a member of the ISP Education Team if you are unsure.

The qualification has been developed and is awarded by ISP and sits on the Regulated Qualifications Framework (RQF). The RQF is a qualification framework regulated by Ofqual.

Institute of Sales Professionals

The Institute of Sales Professionals (ISP) is an internationally recognised professional sales body, which advances and promotes excellence in the sales profession. It is a community of sales professionals building standards of excellence, diversity and education ensuring the best knowledge, understanding, skills and practice in the sales profession.

ISP want their learners and members to develop sales professional knowledge and skills through a carefully structured approach, consequently our activities include:

- Professional Registration
- Sales Code of Conduct
- Continuing Professional Development programme
- Sales Professional Framework
- Professional Sales Qualifications and Certified Sales Professional status.

The ISP has members from all areas of the sales force and being registered on an ISP qualification ensures attainment of the best knowledge, skills, behaviours, and practices in professional sales. Further information can be found on the ISP website www.the-isp.org

Sales Qualifications

ISP is an Ofqual regulated awarding body of vocationally related qualifications (VRQ's), committed to the professionalism of all members of the sales force, both in the UK and Internationally. It supports all those who work at every level of the sales function and ensures they have access to relevant career progression opportunities through learning, development, and certification.

Not only is the ISP a nationally recognised professional sales qualifications body, but it also bases its qualifications on the Sales National Occupational Standards and Employer-led B2B Sales Trailblazer standards, thus ensuring that every salesperson certificated by the ISP and every apprentice certificated by the ESFA, has achieved a nationally recognised sales qualification and/or apprenticeship standard.

Qualifications Structure

In focussing its vision, the ISP has brought together, the Sales National Occupational Standards, the ISP Sales Professionalism Framework, the ISP professional sales membership journey, and industry roles and requirements. By using all these elements of the sales journey, the ISP has developed an inclusive, relevant, robust, and worthwhile set of professional sales qualifications that satisfy both national standards and industry roles and requirements.

The ISP has developed the qualifications available at Certificate and/or Diploma level:

1) Sales Professionalism (Level 3)

2) Executive Sales Professionalism (Level 4)
3) Advanced Sales Professionalism (Level 5)
4) Sales Coaching & Assessment (Level 5)
5) Chartered Sales Professionalism (Level 6)

About this Qualification

Key Facts

Qualification Accreditation Number (QAN)	603/5904/3 (Certificate) 603/5903/1 (Diploma)
Total Qualification Time	410
Guided Learning Hours	306
Credit value	41
Level	5
Assessment method	

Description & Target Audience

The ISP Level 5 Certificate & Diploma in Advanced Sales Professionalism (VRQ) are qualifications aimed at individuals who intend to develop and gain formal recognition of their knowledge, understanding and competence of working as a sales manager or in an advanced sales professional role. The qualifications are suitable for individuals working in, or hoping to work in, a variety of sales manager or advanced sales professional roles, either managing a sales team or managing key and/or important accounts.

By achieving the qualification learners will cover the required essentials of sales and/or key account management, with respect to sales organisation and sales operations at this level. The core units cover the extremely important areas of sales leadership, setting targets, financial performance and sales performance management. The core units are then followed by a range of optional units that allows learners the scope to choose those areas most relevant to them, as follows; sales enablement, sales information analysis, sales technology systems, motivation and compensation, coaching and professional development. The units are vocationally related units and include the relevant knowledge, application and practical elements of sales and/or key account management, with respect to sales organisation and sales operations at this level.

Learners who achieve the Certificate qualification can progress onto the ISP Level 5 Diploma in Advanced Sales Professionalism (VRQ) and can use unit credits already achieved as there is unit overlap with the Diploma qualification. They can also progress using their CPD programme or onto other relevant qualifications eg Graduate Degree Apprenticeship (Level 6).

Learners who achieve the Diploma qualification can progress onto the ISP Level 6 Certificate in Chartered Sales Professionalism (VRQ). They can also progress using their CPD programme or onto other relevant qualifications eg Graduate Degree Apprenticeship (Level 6).

Delivering this qualification

Qualification Structure

To achieve the Certificate qualification learners must complete all 4 mandatory units*
To achieve the Diploma qualification learners must complete all 4 mandatory units, plus 5 optional units*

Mandatory units

Ref	Unit Title	Level	GLH	TQT	Credit
ISP501	**Sales Strategy & Leadership:** Setting targets and forecasting for sales	5	38	50	5
ISP502	**Performance Management (Ind & Bus):** Managing sales team performance	5	48	60	6
ISP503	**Winning Business (Solutions Selling):** Review financial performance of customer accounts	5	38	50	5
ISP504	**Sales Talent Management & Compensation:** Motivate sales professionals	5	28	40	4

Optional units

Ref	Unit Title	Level	GLH	TQT	Credit
ISP401	**Keeping & Developing Business:** Build and retain effective sales relationships	4	38	50	5
ISP404	**Winning Business (Solutions Selling):** Develop sales proposals and quotations	4	28	40	4
ISP505	**Sales Enablement:** Manage sales technology systems	5	28	40	4
ISP506	**Coaching:** Use coaching in sales	5	22	30	3
ISP507	**Professional Development:** Manage ethical, legal and professional requirements and development.	5	38	50	5

Rules of Combination

Rules of combination is a description of the credit accumulation required for the achievement of a qualification. Certain qualifications will clearly identify where only specific optional units can be chosen to make up a larger qualification. Please contact eqa@the-isp.org if you are not sure or need further information on the rules of combination for this qualification.

Total Qualification Time (TQT)

- Total qualification time (TQT) for the Certificate is 200 hours - (Guided Learning (GLH) is 152 hours)
- Total qualification time (TQT) for the Diploma is 410 hours – (Guided Learning (GLH) is 306 hours)

TQT & GLH Definitions:

TQT is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required for a Learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

Total Qualification Time is comprised of the following two elements:

- the number of hours which ISP has assigned to a qualification for Guided Learning; and
- an estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study, or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the Immediate Guidance or Supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

GLH is the sum of guided learning plus examination assessment time. It is the responsibility of training providers/centres to decide the appropriate course duration, based on their learners' ability and level of existing knowledge. It is possible therefore, that the number of hours could vary from one training organisation/centre to another depending on the learners' needs.

Learner entry requirements

There are no formal entry requirements. However, learners should be able to work at level 6 or above and be proficient in the use of English Language.

Recognising Prior Learning (RPL)

Ofqual definition of RPL is the:

(a) identification by awarding body of any learning undertaken, and/or attainment, by a Learner.
   a. prior to that Learner taking a qualification which, the awarding body makes available or proposes to make available, and
   b. which is relevant to the knowledge, skills and understanding which will be assessed as part of that qualification, and

(b) recognition by an awarding body of that learning and/or attainment through amendment to the requirements which a Learner must have satisfied before the Learner will be assessed or that qualification will be awarded.

Therefore, prior to the commencement of a qualification, a Training Provider may apply the use recognition of prior learning or prior achievement to reduce the amount required to prepare a learner for assessment.

For further information on how Training Providers can apply to use RPL as described above, please refer to the Recognition of Achievement and Prior Learning Policy available in the ISP Provider Portal.

Qualification Assessment

The qualification is a combined knowledge and competence qualification. It is assessed through the completion of a portfolio of evidence, which must be internally assessed, and quality assured by the Training Provider. A portfolio of evidence gives Provider's flexibility in how individual assessment criteria are assessed.

Learners must achieve all the pass criteria across all units, to be awarded a Pass. Examples of evidence for the portfolio could include:

Knowledge criteria:

- worksheets
- record of oral and written questioning
- assignments/projects/reports
- candidate and peer reports
- record of professional discussion

Skills and behaviour criteria:

- assessor observation - completed observational checklists
- witness testimony
- record of professional discussion
- candidate and peer reports

Assessors can use other methods of assessment providing they are valid and reliable. Providers must take all reasonable steps to avoid any part of the assessment of a learner (including any internal quality assurance and invigilation) being undertaken by any person who has a personal interest in the result of the assessment.

Where each Unit has it, Providers should use the suggested assessment method. Where a Training provider wishes to used other centre-devised assessment methods these should be agreed with ISP Quality Manager before delivery commences.

All assessment evidence for this qualification should be contained within a Learner portfolio of evidence which should be internally assess and quality assured by the Approved Training Provider and externally quality assured by the ISP prior to certification (subject to ISP's Direct Claim Status policy).

All Learning Outcomes within each Unit must be met to achieve the qualification. Learner evidence within their Portfolio must be clearly mapped against the earning outcomes and assessment criteria and the location of learner evidence must be indicated in the portfolio of evidence. Achievement Logs for these qualifications, which include mapping to each Unit are available on request.

Assessors should assess only against the assessment criteria provided in this specification. Any additional assessment criteria grading will not be included in any external quality assurance activity undertaken by the ISP without prior agreement.

This qualification is only graded at Pass, with successful learners achieving a Pass.

Simulation & Realistic Working Environments

Simulation

Where simulation is used for permitted units, it should only form a small part of the evidence for the qualification. Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies. Simulation must be undertaken in a ‘realistic working environment’ (RWE). An RWE is “an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures, and requirements for cost-effective working. Guidelines for using RWE can be found below.

Realistic Work Environment

It is essential that organisations wishing to operate an RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in an RWE the following guidelines must be met:

1. The RWE is managed as a real work situation.
2. Assessment must be carried out under realistic business pressures.
3. All services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations.
4. Learners must be expected to achieve a volume of work comparable to normal business practices.
5. The range of services, products, tools, materials, and equipment that the candidates use must be up to date and available.
6. Account must be taken of any legislation or regulations in relation to the type of work that is being carried out
7. Learners must be given workplace responsibilities to enable them to meet the requirements of the units
8. Customer perceptions of the RWE is similar to that found in the work situation being represented
9. Learners must show that their productivity reflects those found in the work situation being represented.

Assessor requirements

ISP Qualifications require nominated assessors for this qualification to meet the following:

- Demonstrable occupational competence in Sales equivalent to at least one level above the level of this qualification. This can be in the form of qualification achievement and/or work experience in a similar sales role.
- Where sales leadership competence is required, we would expect the assessor to be able to demonstrate occupational expertise and experience in a sales leadership role.

ISP also recommends that the Assessor hold, or be working towards one of the following qualifications:

- Level 3 Award in Assessing Competence in the Work Environment
- Level 3 Certificate in Assessing Vocational Achievement
- A1 Assess Learner Performance Using a Range of Methods
- D32 Assess Learner Performance and D33 Assess Learner Using Different Sources of Evidence

ISP requires Assessors to complete a minimum of 24 hours of sales related CPD activity per year.

Internal Quality Assurance requirements

ISP Qualifications require nominated IQA’s for this qualification to meet the following:

- Demonstrable occupational competence in Sales equivalent to at least one level above the level of this qualification. This can be in the form of qualification achievement and/or work experience in a similar sales role
- Where sales leadership competence is required, we would expect the assessor to be able to demonstrate occupational expertise and experience in a sales leadership role.

ISP also recommends that the IQA hold, or be working towards one of the following qualifications:

- Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice
- Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice
- D34 or V1 verifier awards

ISP also recommends that the IQA to complete a minimum of 24 hours of sales related CPD activity per year.

Appendix 1 – Qualification Content

This section provides details of the structure and content of this qualification.

Each unit overview includes:

- Unit title
- Unit reference
- Unit summary
- Level
- TQT
- GLH
- Credit value
- An indication of whether a unit is mandatory or optional.

Following the unit summary there's detailed information for each unit containing:

- Learning outcomes (what the learner will learn in this unit)
- Assessment criteria (what the learner will be able to demonstrate as a result of achieving the learning outcome
- Assessment method (ISP's recommended assessment method)
- Indicative content (a guide for tutors/coaches delivering the learning as to what should be included to achieve the learning outcomes and meet the assessment criteria.
    - This content is not prescriptive but is intended to provide helpful guidance to tutors, coaches, and learners

Title	Unit 1: Setting targets and forecasting sales	
Reference	ISP/501	
Summary	This unit is about understanding sales strategies and plans in relation to organisation strategy, the requirements of developing sales strategies and plans, the implementation of sales strategies and plans and the potential for change in sales strategies and plans.	
Level	5	
TQT	50	
GLH	38	
Credit value	5	
Mandatory or optional?	**Mandatory** ☒	**Optional** ☐

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand the requirements of sales forecasting	1.1	Assess appropriate metrics for sales forecasts		**Metrics:** Organisations mission and strategy; type of sales forecast required; elements of sales forecast; data/trend requirements; use of qualitative and/or quantitative tools; access to historical data; CRM; accountancy software; trend analysis required; relevant questions; required adjustments, setting realistic objectives and targets, etc.
	1.2	Establish authenticity of information sources required for sales forecasting		**Information sources:** Authentic; trustworthy; valid, current, sufficient; usable; history, etc.
2. Be able to use relevant data and trends in sales forecasting	2.1	Evaluate sales trends and market conditions		**Purchasing preferences:** Different customer purchasing preferences; determining appropriate distribution strategies; the options for distribution channels (traditional, modern, technological); features of procurement that affect distribution channel decision making, etc.
	2.2	Evaluate the impact of internal and external factors		**Structure of sales team:** Evaluate sales team structure; determine sales team structure requirements; different

				types of sales team structure (geographic, product based, customer based, brand based, etc.); evaluate sales team ability to achieve sales, etc.
	2.3	Use historical sales data to inform forecasts		**Sales Procedures:** Investigate sales procedures; evaluate in relation to organization strategies; sales procedures and cost effectiveness; sales procedures and legal, regulatory, ethical, social requirements; sales procedures and compliance; recommend improvements where appropriate.
	2.4	Develop time plans for sales forecasts		**Sales resource:** Establish sales resource requirements; human resources, physical resources; financial resources; sales process requirements; effective deployment of all required sale resources; recommend changes where appropriate, etc.
3.. Be able to forecast sales for target setting	3.1	Evaluate relevant sales forecasting techniques		**Techniques:** Review different techniques/methods; qualitative and quantitative techniques; select most appropriate method(s); organisational guidelines on development and recording of sales forecasts; CRM; accountancy software; trend analysis techniques, etc.
	3.2	Use appropriate software and forecasting methods		**Software:** Forecasting software programmes; forecasting models; qualitative and quantitative techniques; prediction of future sales trends; level of interaction between sales team and their internal technology to understand accuracy; looking at the value of this technology when used effectively, etc.
	3.3	Assess the impact of potential issues		**Potential issues:** Bonus and commission structures – impact on forecast sales; impact of problems outside own control eg Internal and external business environment; micro and macro environment; Porter's theories of business environment; reality of such factors and effect on forecasting, etc

	3.4	Consult colleagues about the implications of sales forecasts		**Colleagues:** Consult about sales forecasts; implications for organisation; develop process/procedure for sharing and questioning forecasting information i.e. who the key stakeholders are, what their likely interests will be; any problems, constraints, etc.
4. Be able to set sales targets	4.1	Set sales objectives and targets from sales forecasts		**Objectives and targets:** Setting challenging and realistic objectives/targets; making reliable forecasts of future trends; using information gathered to agree targets with sales resource; look to SMART objectives; ensure targets are agreed against goals of the business; look at individual and team forecasts; sharing and agreeing with teams; ensuring these are contributing to the strategy of the business, etc
	4.2	Use appropriate measurement activities for objectives and targets		**Measurement:** Monitor actual performance against forecast; measurement and control mechanisms for reporting variances; revise sales forecasts when appropriate; use qualitative and quantitative measuring techniques to devise an ongoing picture of actuals against forecast; make quarterly adjustments according to trends; pressure on forecasting eg managerial pressure, commission pressures, how they affect accurate forecasting; account plans and data to rationalise forecasts, etc.

Title	Unit 2: Managing sales team performance	
Reference	ISP/502	
Summary	This unit is about understanding major customer strategic relationships, planning and developing major customer strategic relationships, and evaluating major customer strategic relationships.	
Level	5	
TQT	60	
GLH	48	
Credit value	6	
Mandatory or optional?	**Mandatory** ☒	**Optional** ☐

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand how to achieve positive relations with sales teams	1.1	Evaluate management and leadership styles in relation to different situations and people		**Styles:** From autocratic to laissez-faire; what management style/type is required; in different circumstances; in different situations; and with different people e.g. change, growth, recession, etc.
	1.2	Make decisions taking on board all stakeholders		**Stakeholders**: Use models such as Mendelow's power and interest matrix; review organisational stakeholders and what type of communications are required to build trust, partnership and belief, etc.
	1.3	Assess the importance of demonstrating fair and principled behaviour		**Importance**: The need for concise and consistent communication; appropriate management style(s); the importance of leading by example; the value of actions over words, etc.
	1.4	Develop a collaborative sales team approach		**Collaborative**: Collaboration within the sales team; between the sales team and other teams within organisation; use models such as the Block Matrix; understand the emotions, concerns, motivations and

Institute of Sales Professionals

				behaviours of team members; based on these – communicate appropriately, ettc
2. . Be able to communicate sales vision with sales teams	2.1	Present sales vision to sales teams ensuring goal achievement contexts are set and understood		**Present vision**: The importance of creating visions of success; where this sits within the company's wider strategy; where the team fits in and contributes; the importance of this presentation and getting 'buy-in' from the team; articulates underlying values; sets the context for goal achievement, etc.
	2.2	Create two-way communications with sales teams ensuring sales team involvement		**Two way comms**: Effective team briefings; setting processes and format for team briefings; the need to have personal and team briefings to encourage participation; enabling asking questions; ability to interpret the vision appropriately; the sales team role in achieving the vision; ensure appropriate environments and communications technology are used for different types of conversation or briefing, etc.
3. Be able to provide a platform for sales teams to achieve their tasks and objectives	3.1	Select the required key tasks to achieve objectives		**Required tasks**: The importance of delegation and prioritizing; looking at models such as important/urgent; when to delegate; show and do (ABC), etc.
	3.2	Allocate objectives and tasks to team members		**Task allocation**: Communicating objectives; allocating tasks; the importance of delegation; importance of supervision; allocating appropriate tools; being available for feedback or questions, etc.
	3.3	Demonstrate encouragement and support of sales team members		**Encouragement**: To achieve tasks and objectives; the motivations of the team; how best to praise - formally or informally, private or public; ensure that praise is worthy and proportionate; understand the effects of praise on other team members, etc.
	3.4	Steer the team through difficulties and challenges		**Challenges**: Covering development phase of team (forming, storming, norming or performing); look for 360˚ feedback; how prepared the team are to undertake

				challenges; possible or actual conflicts; understand what tools or resources will be needed to move forward, etc.
	3.5	Monitor sales team progress and quality of work		**Progress monitors**: Progress and monitoring can only come from objective setting (SMART); provide constructive feedback; feedback should be formed against the initially set objectives; look at different communication methods and tools; understand when and how each should be used; look to address issues and re-enforce good behaviours and outcomes, etc.
	3.6	Recognise sales team appropriately when objectives are achieved		**Recognition**: Use of formal approaches; look at the motivations and character of personnel; understand the best way to deliver recognition -private/public, formal/informal, written/verbal, through actions/reward, etc.
4. Be able to structure accountability within sales teams	4.1	Demonstrate sales manager accountability for achieving tasks		**Manager accountability**: Look at personal development plans; own objectives inside/outside the workplace; understand the importance of having personal and team goals; how to communicate the responsibility of the individual in self-development; set accountability markers, etc.
	4.2	Create accountability in sales team members		**Member accountability**: Look at the objectives set previously; where they contribute to the team; ensure team members understand their role within the team; the impact from not contributing to team efforts, etc
5. Be able to align sales management actions with sales team and organization	5.1	Maintain alignment of organisation resources with the vision and goals		**Alignment**: Process for maintaining alignment with sales and organisational strategy; benchmarking; continual monitoring; looking at ways to correct and adjust to maintain alignment, etc.
	5.2	Demonstrate consistency of sales operations within the strategy		**Consistency**: consistency of operation; consistency of structure; consistency of resource allocation; look at benchmarking; present results back to team; delivery of

				individual/team appraisals; visibility of performance against business goals, etc.
	5.3	Demonstrate sales management actions are in-line vision and strategy		**Actions**: Congruent with set vision; congruent with strategy; are seen at an interpersonal level; gather feedback; importance of 360˚ feedback; ensure a culture of openness; actions to help improve own performance; lead by example in creating culture of feedback; performance review, etc.

Title	Unit 3: Review financial performance of customer accounts
Reference	ISP/503
Summary	This unit is about understanding customer procurement practices, understanding customer supplier information needs and supplier organisation's unique business value, as well as preparing and developing sales strategies for customer procurement practices.
Level	5
TQT	50
GLH	38
Credit value	5
Mandatory or optional?	**Mandatory** ☒ | **Optional** ☐

Learning Outcome – the learner will:	Assessment Criteria – the learner can:		Assessment Method	Indicative contents:
1. Be able to use financial tools to evaluate customer performance	1.1	Estimate customer lifetime value cash flow		**Lifetime value:** Value generated if customer maintains average loyalty levels; how effects organisational objectives; effect on margins/profitability; evaluation of customer potential, legislation/regulations for financial accounting/reporting eg data protection, financial services, etc.
	1.2	Calculate sales volumes required to achieve target profitability		**Sales volume**: Use historical data/fluctuations in ordering - to understand potential customer profitability; key revenue achievement throughout customer lifecycle; use discounted cash flow techniques; customer retention and profitability; organization reporting formats; etc.
	1.3	Monitor the impact of variable costs on customer profitability		**Variable costs**: Look at variable costs; cost of sales, additional human resources required to fulfill objectives; additional materials required to fulfill objectives; internal/external market and stakeholder causes of variable costs; cash flow forecasts, etc.

2. Be able to use management accounting procedures in evaluating customer performance	2.1	Analyse costs of fixed overheads and administrative support		**Analyse costs**: The overheads or fixed costs allocated to the sales department; costs allocated to customer account; difference between fixed and variable costs; impact on customer profitability; organisation's management accounting procedures; familiarisation of management accounts to understand the full profitability of the department, etc..
	2.2	Use customer profit statements for ongoing measurement of customer performance		**Ongoing measurement:** Establish the costs against key customers; develop a reporting mechanism for ongoing reporting of customer performance; develop customer profit statements; use and update for ongoing measurement of customer performance, etc..
	2.3	Use financial ratios to analyse customer accounts		**Financial ratios**: Ensure customer is financially secure; external checks for customer creditworthiness; types of external credit checks; appropriate financial ratios to interpret financial health of customer; determine appropriate credit limits; manage customer credit activities, etc. .
3. Be able to judge the value of each customer	3.1	Assess customer business and financial risks		**Risk profiling**: Draw up risk profile for customer accounts; risk criteria and risk assessment; risk management assessment tools; business environmental factors; both micro and macro i.e. ability to pay, when payment should arrive; cash flow management of allocated resource; potential threats to the economic environment for the customer, etc.
	3.2	Estimate the value of each customer		**Customer value**: Measure/identify the differences between order history and performance; use available financial and qualitative evidence; anecdotal opinions of other business partners; mapping out potential performance with customers, etc.
	3.3	Review customer financial performance and other features		**Customer performance**: Use appropriate financial data; financial reporting; use other customer performance

				features; CRM; Management accounts; understand the performance of accounts; identify key trends; identify key variances eg ordering and payment, etc.
4. Be able to estimate future customer performance	4.1	Make decisions about customer relationship future direction		**Customer decisions**: Make business decisions on future relationship; base on financial performance; look at strategic objectives of the business; map business objectives to customer objectives; understand how customers can influence and help the direction of the business; what the financial implications look like, etc.
	4.2	Prepare contingency plans in relation to financial performance of customers		**Contingency plans**: When problems arise in customer financial performance; appreciation of business environment for both customer and own organization; how they exist together; what key threats could affect the business; develop contingency plans for likely threats, etc.
	4.3	Consult with stakeholders ensuring access to financial performance data		**Stakeholders**: Who the major stakeholders are; include the customer in this matrix; what data required for stakeholders; what information is needed from each stakeholder; most appropriate ways to communicate information to them; appropriate access, etc.

Title	Unit 4: Motivate sales professionals	
Reference	ISP/504	
Summary	This unit is about understanding strategic leadership in sales, understanding strategic management in sales, being able to contribute to the strategic direction of the organisation and being able to review own strategic leadership and management requirements.	
Level	5	
TQT	40	
GLH	28	
Credit value	4	
	Mandatory ☒	**Optional** ☐

Learning Outcome – the learner will:	Assessment Criteria – the learner can:		Assessment Method	Indicative contents:
1. Understand strategic leadership in sales	1.1	Explain legislation and regulation requirements of motivation		**Requirements**: Relevant legislation eg employment, health and safety; legal and ethical aspects of motivation; ISP sales code of conduct; ISP recognition/membership; incentives and rewards; gifts; bribes; conflicts of interest, etc.
	1.2	Evaluate the key links between sales performance and motivation		**Key links**: What really motivates people; the complexities of motivation; how to motivate people; goals; objectives; fulfilment; achievement; worklife; not just financial reward; compensation and motivation; sales success; problems of not motivating, etc.
	1.3	Analyse required motivational behaviours and factors		**Behaviours and factors**: Positive and negative behaviours; sales team motivational factors; impact of behaviours and factors on sales; feelings and views of the sales team; their role in sales team success; sales team and organisation environment; motivational theories eg Maslow, Herzberg, Vroom etc; look to evaluate and apply

				back to the business; team building techniques that support motivation, etc
	1.4	Evaluate the range of motivational tools available		**Motivational tools**: Evaluate the different types of financial and nonfinancial incentives; consider bonus and commission; types of commission structures (Accelerator's etc.); evaluate non-financial rewards - holiday, experience, team building; additional responsibility, benchmarking against other sales teams; continuous evaluation and update to ensure incentives are appropriate, etc.
2. Be able to establish required systems for sales team motivation	2.1	Evaluate organisational barriers that conflict with motivation		**Barriers**: Organisation systems and procedures; monitoring and measuring of motivation/achievements; management style; lack of recognition and/or reward; possible conflict with motivational aspects, causing detrimental effects on sales; explore ways to overcome such barriers; etc
	2.2	Provide clear measures of sales success		**Measures**: Transparent benchmarks against which sales team members can measure their success; look at non-financial methods such as Net Promoter Score; pipeline fulfilment; those for the individual (Targets, KPI's, etc.); those for team performance (business performance, activity, etc.); financial rewards, etc.
	2.3	Establish monitoring and control procedures for measuring success		**Monitoring and control**: Key control indicators required to ensure validity and consistency; ensure appropriate indicators are considered; those for the individual (Targets, KPI's, etc.); those for team performance (business performance, activity, etc.); informal/formal control methods such as catch ups; performance reviews; 360 evaluations, understand external effects on team monitoring such as territory, business environment; customer perception such as Net Promoter Score; regular monitoring; regular reviews; fail safes, etc.

4. Be able to motivate sales professionals	3.1	Provide opportunities for personalised motivational sales plans		**Sales plans**: Agree Personal Development Plans; use PDPs to encourage motivation and achievement; agree KPI's and performance measures; allocate appropriate incentives; record/document ensuring measurement and review; carry out appraisals/performance assessments to judge the levels of personal motivation, etc.
	3.2	Recognise achievement of sales professionals		**Recognise**: Different methods of recognition; use public praise; appropriate media; bonus or commission; share Herzberg's hygiene factors; impact of fulfilling work; sales achievement; work life against life goals, etc.
	3.3	Evaluate scope for improving motivation and enhancing sales		**Scope**: The effect of incentives in terms of improving performance; how this effects costs and profitability of the business; evaluating technology that may assist in moulding incentives to change behaviours; developing internal communications to aid motivation, etc.

Title	Unit 5: : Build and Retain Effective Sales Relationships
Reference	ISP/401
Summary	This unit is about using commercial acumen in organising the salesforce, understanding the psychology of factors affecting the salesforce, as well as using commercial acumen and psychology in planning and reviewing salesforce organisation and resources.
Level	4
TQT	50
GLH	38
Credit value	5
Mandatory or optional?	**Mandatory** ☐ **Optional** ☒

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Be able to establish relationships with customers	1.1	Evaluate customers in order to build sales relationships		**Evaluate customers**: Research customers/clients - exhibitions, events, journals; customer/organisation relevance and fit; social channels for personal and business understanding of clients; prioritise and approach; legal and ethical requirements; corporate social responsibility; quality / compliance issues; nature and scope of relationship; long term value, etc.
	1.2	Establish existing and potential customer needs and expectations		**Existing and Potential**: Account information; what product mix customers buy; whether buying other products from competition; relationship opportunities; reduce burden - use different technologies/suppliers to reduce costs within customer account; improve service – use existing SLA (Service Level Agreements); update against

				customer aims and objectives; review customer potential internally, etc.
	1.3	Explain product/service offer in terms of customer needs and expectations		**Product/service**: Features and benefits in relation to customer needs and expectations; honesty; working together; mutual benefits; long term relationship; helping each other; organisation criteria for establishing customer relationships, etc.
	1.4	Evaluate the importance of networks and communications in establishing relationships		**Establishing Relationships Networks**: Networking strategy; where customers/potential clients go; what events; what exhibitions; magazines; where will you see your clients, etc. Communications: Through personal networks; social media; facebook; twitter; linked in; newsletters; ensure content is applicable and relevant; customer relationship management, etc.
2. Be able to build relationships with customers	2.1	Build rapport with customers		**Build rapport**: use different channels to gain credibility; use referrals; use introductions; approach directly; approach via content delivery; developing product/service; interpersonal skills; communication to build trust - trust is beyond rapport; trust through actions; trust via demonstration, delivery, assisting customer strategic objectives, etc.
	2.2	Negotiate and operate mutually beneficial sales solutions		**Sales solutions**: Customer issues; potential issues; evaluating how own products/services would address such issues; placing a financial value on solving such issues; negotiation establishing mutually beneficial financial outcomes; customer agreement on operation and maintenance of

				relationship; developing a customer relationship plan, etc.
	2.3	Evaluate opportunities to develop relationships with customers		**Opportunities**: The strategic question; how relevant own organisation is to the customer; where the business has added value in similar circumstances; reviewing with a logical approach where you can help the customer achieve strategic aims; using expertise; CO-IMPACT sales techniques; who key stakeholders are; how own organisation adds value through input of expertise to customer accounts, etc.
	2.4	Evaluate the use of consultative selling in building relationships		**Consultative selling**: Use consultative selling to build rapport, trust and growth; customers likely to respond to consultative selling; best places to research for such customers - exhibitions, events, journals, etc; look at social channels for personal and business understanding of customers; product/service in relation to customer needs and expectations; working together; mutual benefits; joint ventures; long term relationship; helping each other, etc.
3. Be able to maintain relationships with customers	3.1	Use feedback to ensure the quality and consistency of product/service		**Feedback**: Formal and informal feedback; the importance of feedback; how to obtain relevant feedback from customer surveys; from focus groups; formal feedback discussions with external parties; regular distribution of feedback; appropriate distribution; feedback mechanisms to ensuring quality monitoring; enhancing customer relationship, etc.

	3.2	Explain how to maintain customer loyalty with own organisation		**Customer loyalty**: Understand the market environment, look at market research; understand business environment of customers; feeding back to internal stakeholders of potential new products/services; providing insights that will add value to the customer, etc.
	3.3	Follow up opportunities for further sales		**Further sales**: Concepts of further selling opportunities; opportunities for up-selling; opportunities for cross-selling; selling add-ons; when it is appropriate; viability, etc.
4. Be able to monitor and control relationships with customers	4.1	Deal with customer issues appropriately		**Customer issues**: Customer issues; customer complaints; problems; organization/customer conflicts; handling appropriately; providing suitable solutions; resource issues; evaluating how own products/services would address such issues; gather information/data (through different qualitative/quantitative measures) to address and solve any issues/problems; promote areas of strength, etc.
	4.2	Distribute regular feedback to colleagues		**Formal/Informal feedback**: The importance of feedback and how to obtain relevant feedback from customer surveys, focus groups or formal feedback discussions by external parties. **Regular feedback**: Formal and informal feedback; the importance of distributing feedback; formal/virtual feedback discussions; meetings; briefs; outcomes; appropriate feedback mechanisms; ensuring quality monitoring; enhancing customer relationship, etc

	4.3	Monitor and evaluate customer relationships		**Monitoring:** Customer retention rates, customer leave rates; success factors for growing customer relationships/accounts; what activities have led to reduction or growth in relationships/accounts; techniques of using data (when collated); theories and techniques for analysing data; feeding back into the strategic direction of the business, etc

Title	Unit 6: Develop Sales Proposals and Quotations	
Reference	ISP/404	
Summary	This unit is about understanding the key factors that impact on sales forecasting, understanding the techniques of sales forecasting, being able to monitor and review actual sales against forecast sales, and understanding budgeting methods and variances.	
Level	4	
TQT	404	
GLH	28	
Credit value	4	
Mandatory or optional?	**Mandatory** ☐	**Optional** ☒

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand the elements of sales proposals / quotations	1.1	Explain how to write proposals / quotations		**Writing proposals/quotations**: Methodology; structure; essentials/must haves; desired/would like; promotes organisational strengths; positively differs from competitor proposals; legal/ethical requirements; organisation procedures/style, etc.
	1.2	Explain customer procedures for submitting sales proposals		**Customer procedures**: customer set proposal structure; satisfying dates, times and required protocols; customer house style; legal/ethical requirements; understanding customer requirements, any stakeholders involved; etc
	1.3	Explain how to develop persuasive arguments		**Persuasive arguments**: Product/service features and benefits in relation to customer requirements; proposal solutions; highlighting strengths; minimising weaknesses; use quantitative and qualitative data; proof and evidence; organisation previous experience/successes; organisation case studies, etc.

2. Be able to prepare for sales proposals / quotations	2.1	Fully address all customer requirements in the proposal		**Customer requirements**: Customer requirements are fully understood; fully address customer brief/requirements; use persuasive arguments; use supportive proof and evidence; quantitative and qualitative data; etc.
	2.2	Resolve all issues requiring clarification before finalising the proposal		**Issues of clarification**: Customer issues; organizational issues; potential issues; evaluation and effect; highlighting strengths; minimising weaknesses; proposal team review; manager/objective review, etc.
	2.3	Evaluate organisation conditions and constraints		**Conditions and constraints**: Inclusion of organisation conditions / constraints; protection of organisation's interests; strategic aspects; stakeholder issues, etc.
3. Be able to produce sales proposals / quotations	3.1	Write sales proposals/quotations		**Write proposals/quotations** establish proposal structure; develop content of proposal; use appropriate house style; include essential information; supported by evidence/proof; based on sound understanding of market factors; features/benefits of product/service; price; terms and conditions; fully address customer/proposal brief; ensure appropriate level of detail, analyse proposal competitors; etc.
	3.2	Consult organisation colleagues		**Consult colleagues**: Consult relevant colleagues – marketing, finance, etc; establish a proposal team; ensure price/offer reflects good value; gain internal approval; proposal team sign off; manager sign off, etc.
	3.3	Submit sales proposals/quotations		**Submit proposal**: Submit to customer; on time; within date; within protocols; follow up appropriately; offers of further clarification, if required; offers of further information, if required, etc.
4. Be able to evaluate sales proposals / quotations	4.1	Analyse proposal feedback from the customer		**Proposal feedback**: Obtain customer feedback on the proposal; obtain feedback from colleagues; evaluate the

				outcome of the proposal; recommend improvements for future proposals; use information for qualifying proposals in the future; evaluate offer of proposal winner, etc.
	4.2	Store proposal information/data appropriately		**Store proposal**: Confidential information is stored correctly; conforms to organization requirements; stored safely and effectively; protected from misuse; satisfies quality and compliance requirements, etc.

Title	Unit 7: Manage Sales Technology Systems
Reference	ISP/505
Summary	This unit is about understanding the key elements and effects of sales related change, being able to use intelligence and insight in gaining support for sales related change and using intelligence and insight in managing sales related change and the change plan.
Level	5
TQT	40
GLH	28
Credit value	4
Mandatory or optional?	**Mandatory** ☐ **Optional** ☒

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Be able to assess sales technology systems	1.1	Analyse information required for sales activities		**Sales information**: organization sales technology strategy/objectives; legislation/regulations/codes of practice; information about customers; customer sales/buying/delivery habits; cross/up selling opportunities; targeting customers; sales and promotional activities; appropriate communication methods; use of OPIR (setting an Objective, developing a Plan, Implementing, analysing and Reporting), etc.
	1.2	Evaluate the functionality of sales technology systems		**Functionality**: existing systems; usefulness of information; compatibility with sales information needs; meeting current and future needs; identifying enhancements; data storage systems; CRM; data leads / prospecting; customer details; essential data; sales activity tracking; joined up systems; training requirements, etc.
2. Be able to manage sales technology system operations	2.1	Manage sales technology system operations		**Operations**: ensure appropriate use of system; maintenance and updating of system information; in line with relevant/required procedures; organisation protocols; standards for information management; sales

				technology systems processes and procedures; inputting, maintaining, updating and removing data; levels of data; access to data; administration rights; data reliability – trustworthy, sufficient, valid; benefits and risks of using data, etc.
	2.2	Provide support for those using sales technology systems		**Support**: Up to date guidance; types of guidance; skills development activities for users; recognize individual attitudes; sales technology system processes; how information is protected, stored and managed; the importance of data storage against data protection; legal, ethical and organisational considerations; legal and ethical issues around the use of sales activity information; establishing and managing Marketing Information Systems (MkIS), Marketing Decision Support Systems (MKDSS); benefits on organisation Sustainable Competitive Advantage (SCA), etc.
3. Be able to manage changes in sales technology systems	3.1	Implement plans to enhance sales technology systems		**Enhance**: Review sales information development requirements; develop plans for required changes to sales technology systems; review system requirements; review generated reports; ensure join up of changed system; engage colleagues in development process; engage stakeholders in development process, etc.
	3.2	Monitor the effectiveness of sales technology systems		**Monitor**: review processing skills; review operating ability; check objectives being met; review system requirements; review generated reports; organisation practices for monitoring and evaluating; feedback from colleagues; value of sales technology system against sales strategy; system performance; value/usefulness of information/data stored; coherent and useful sales intelligence; what should be gathered in future; importance of ongoing technological advances to assist/ improve the management of data e.g. social media

				communities; integration with other information systems, etc.

Title	Unit 8: Use Coaching in Sales
Reference	ISP/506
Summary	This unit is about understanding how customer insight contributes to organisation continuous improvement, the analysis of information for customer and organisation continuous improvement, and using customer and organisation insight to enhance continuous improvement.
Level	5
TQT	30
GLH	22
Credit value	3
Mandatory or optional?	**Mandatory** ☐ **Optional** ☒

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand the key aspects of coaching in sales	1.1	Assess the key aspects of coaching in sales		**Key aspects**: Key principles and elements; how and where performance can be improved; strengths endorsed; weaknesses addressed; different coaching methods; formal and informal ways; coaching and required communication skills - around questioning and listening; communicating goals; suggesting ideas without solving problems on behalf of the individual, etc.
	1.2	Explain how linking coaching with objectives benefits individuals, teams and organisations		**Effective linking**: Link coaching with long term career aspirations of the individual; understand how linking with individual development effects overall business performance; benefits of coaching; individual, team, organization; how the focus shifts between short/long term objectives, daily tasks, career development, etc.
	1.3	Assess the processes and boundaries of coaching in sales		**Processes and boundaries**: Processes - difference between setting achievement goals, to setting long term beliefs and aspirations; boundaries -where the business/manager/leader is responsible for development;

				where personal issues get too personal and cloud the scope of the coach.
	1.4	Explain how to conclude the coaching process		**Concluding the coaching process**: Use the synergy of creating objectives; objectives with timescales and outcomes – to ensure conclusion of the process; review success against agreed criteria; evaluate whether successes have been achieved; determine further actions, if required, etc.
2. Be able to plan and implement coaching in sales	2.1	Plan sales coaching programmes		**Programme**: Sales coaching programme - based on identified performance needs; look at different models; models such as GROW or Mentoring Meeting Model (Clutterbuck) to plan against the performance needs of the individual.
	2.2	Agree success criteria for sales coaching programmes		**Success criteria**: Look at individuals goals; apply timelines; agreed outcomes; determine what success will look like, etc.
	2.3	Deliver sales coaching sessions and maintain records		**Sessions**: The practical issues around location; creating the correct environment; timing; addressing desired outcomes/objectives per session; delivery - focus on the needs of individual; their career development; ensure accurate keeping of notes; ensure records/actions are agreed; maintain records securely, etc.
	2.4	Evaluate methods that help understand the customer		**Review**: Use goals that are set; review against criteria; agree achievement or not; agree any further actions; seek feedback from the organisation; seek feedback from stakeholders; ensure 360 degree progress is being achieved, etc.
3. Be able to evaluate coaching in sales	3.1	Gather feedback and evaluate own coaching practice		**Gather feedback**: Using 360 degree feedback; evaluate own performance; seek progress reports from coached sales individuals; seek progress reports from stakeholders; understand scope in which these areas have been

				achieved; the coached sales individuals should be encouraged to give feedback, etc..
	3.2	Evaluate the impact of coaching on the individual, the team and the organisation		Evaluation: How the performance improvement of the individual is contributing to the overall strategy of the business; improvements at team level; improvements throughout overall organization; look at potential hierarchy models; see the impact made on each part of the organisation's hierarchy, etc.

Title	Unit 9: Manage Ethical, Legal and Professional Requirements and Development	
Reference	ISP/507	
Summary	This unit is about understanding the laws and regulations that effect the sales function, understanding compliance in relation to the sales function and how to deal with non-compliance, as well as assessing the qualities, skills and behaviours required for the sales role, and managing your professional development plan.	
Level	5	
TQT	50	
GLH	38	
Credit value	5	
Mandatory or optional?	**Mandatory** ☐	**Optional** ☒

Learning Outcome – the learner will:	**Assessment Criteria – the learner can:**		**Assessment Method**	**Indicative contents:**
1. Understand legal, regulatory, ethical and social requirements of the sales function	1.1	Assess the legal, regulatory, ethical and codes of practice requirements in relation to sales		**Legal and regulatory:** The legal environment operated in; areas such as Data Protection; OFT; industry specific departments such as the FCS or Energy commission; implications of compliance and non-compliance for individuals; implications of compliance and non-compliance for teams; implications of compliance and non-compliance for corporations, etc.
	1.2	Analyse the potential impact of social and ethical concerns in relation to the sales function		**Impact:** The current 'status' of sales; where this has come from and why; what the business can do to change this status; the implications of doing this, sales professionalism; codes of conduct, etc..
	1.3	Explain how the organisation's processes and policies meet ethical and social requirements		**Organisation processes and policies:** Understand processes of compliance; explain to colleagues/the team the processes of compliance; who the responsible officer is; social as well as legal processes; how these can be affected positively, etc.

	1.4	Explain the principles of contract law		**Contract law:** Where this sits in the business; the processes involved with ensuring compliance; implications of compliance and non-compliance for individuals, teams and corporations; the penalties for misrepresentation, etc.
2. Understand compliance in relation to the sales function	2.1	Ensure sales people clearly understand the organisation's legal, regulatory, ethical and social procedures (and the importance of putting them into practice).		**Clear understanding:** Explain organisation's legal, regulatory, ethical, social policies and procedures; appropriately communicated; appropriate communication channels; intranets; websites; handbooks; daily practices that ensure compliance; regular updates, etc.
	2.2	Monitor the way that legal, regulatory, ethical and social policies and procedures are put into practice		**Monitor:** Monitoring procedures in relation to organisation's legal, regulatory, ethical, social policies and procedures; the ongoing improvement process to ensure continued compliance; providing support; conducting open discussions; incorporating into sales meetings; feeding back on process and procedure, etc.
	2.3	Provide a climate of openness about meeting and not meeting requirements		**Openness:** Conducting open discussions; incorporating into sales meetings; feeding back on process and procedure, peer meetings, coaching support, creating an environment of question and review; ensuring continued compliance, etc.
3. Understand how to deal with noncompliance	3.1	Identify and correct any failures to meet legal, regulatory, ethical requirements		**Identify and correct:** Create an open environment; share issues and apply procedures correctly; reasons for not meeting requirements; adjusting policies and procedures to reduce possible future failures, appropriately operate compliance processes, evidence and communication, etc.
	3.2	Provide appropriate reports of any failures to meet requirements to relevant stakeholders		**Reports:** Internal procedure to highlight and address failures; how these should be reported; what actions should be taken; what corrections should be incorporated, etc.

4. Be able to assess the qualities, skills and behaviours required for sales role	4.1	Use appropriate tools and techniques to identify own strengths for sales role		**Own strengths:** Key skills / attributes possessed; required behaviours; how they can be leveraged to increase performance; evaluating with line manager and/or peers to evaluate these strengths; why they assist performance; identifying present and future skills and behaviours needed e.g. IT, driving, specific job skills, etc.
	4.2	Use appropriate tools and techniques to identify own needs for sales role		**Own needs:** What own role is; skills and behaviours needed to be successful; reviewing with peers and line management; SWOT analysis to ensure a realistic approach to competency; identifying qualities and behaviours needed e.g. attitude, ability to adapt to change, motivation, aptitudes; experience needed e.g. previous work, voluntary work, qualifications, travel; reflective practitioner approach; 360 degree feedback; SWOT analysis; selfanalysis; comparison with person specification for role, etc
	4.3	Explain qualities and behaviours required for sales role		**Qualities and behaviours:** With reference to job description / personal specification; understand how own role fits into achievement of organisation strategies; supports organisation as a whole; knowledge of the business; skills and behaviours required to effectively operate in the role, etc.
5. Be able to manage your professional development plan	5.1	Evaluate required professional needs		**Needs:** Look at Training Needs Analysis (TNA); Developmental Needs Analysis (DNA) against skills possessed and needed for role; understand how and where these can be achieved; organisational and personal values; career and wider personal aspirations; steps needed to develop own skills, behaviours and competences, etc.
	5.2	Evaluate opportunities available for professional development		**Opportunities:** Look at opportunities to improve skills and behaviours; where fit within the desired competencies of the role; own strengths/weaknesses; look at ideas to

				enhance/improve behaviours as well as skills; compromises to make in own attitude or behaviour to meet core values and behaviours expected by organization; own behaviour, attitudes and mind-sets that may have a positive or negative impact on own sales role; learning experiences that are mutually beneficial to self and organization; in-house and external training; learning zones in organisations eg induction, coaching, shadowing, self-study, mentoring, projects; ISP, qualifications, life-long learning, etc.
	5.3	Create and progress through your professional development plan		**Plan:** Use SMART objectives to map out a development plan; look at short, medium and long term goals; ensure they map to own personal and business objectives; ensure professional development objectives are appropriate to needs of self, job role and organisation; skills audits; ISP framework; targets and action plans, etc.