

Unit 47: **Prioritising Information for Sales Planning**

Unit reference number: D/502/8651

QCF level: 4

Credit value: 3

Guided learning hours: 20

Unit summary

In this unit, you will gain the knowledge, understanding and skills to be able to prioritise information essential for effective and accurate for sales planning.

This unit will enable you to provide a valuable service for any company which incorporates a sales function, irrespective of whether it targets customers directly or via a network of channel partners, distributors and wholesalers. You will learn which information will enable you to confidently advise your employers with their sales planning, and how this collated information has the potential to significantly drive increased sales, via intelligent targeting, based on customer preferences and market patterns.

Due to the vast amounts of information available on the Internet; the challenge is to incorporate only data that is relevant to your requirements.

This unit will enable you to gain an understanding of the sources of information most relevant to you, specifically the range of sources and types of information that supports sales, including customer behaviour, the nature of your organisation's competitor activities and an understanding of the internal information that is necessary to support sales.

You will be able to carry out audits of internal and external business environments, using a range of statistical information to support your sales planning function, by obtaining information about your organisation's customers and competitors. This will be achieved by assessing the strengths and weaknesses of your organisation, as well as its channel partner/distributor network, and prioritising these weaknesses in relation to the organisation's sales objectives. You will also monitor market trends and developments across all communication/feedback channels and review these to assess their implications for your organisation's sales plans.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria
1 Understand sources and types of information that support sales	1.1 Describe the information about customers' behaviour that is relevant to sales 1.2 Explain the nature of competitors' sales activities 1.3 Explain the relevance of information from the external business environment to sales 1.4 Describe sources of business information relevant to sales
2 Understand internal information that supports sales	2.1 Describe the customer base of the organisation 2.2 Explain organisational information storage procedures 2.3 Explain organisational procedures for communicating sales-based information to the sales team
3 Be able to carry out a business audit of the internal and external sales environment	3.1 Obtain information about customers and competitors from a variety of sources to enable a business audit to be conducted 3.2 Organise sales information to support effective sales planning 3.3 Prioritise the internal strengths and weaknesses, and external opportunities and threats the organisation faces in relation to sales objectives
4 Be able to use sales information to support the sales planning function	4.1 Monitor trends and developments that impact on business and sales activities against agreed criteria 4.2 Identify market developments and their implications for organisational sales plans 4.3 Ensure that sales information is communicated to those who need it in accordance with organisational procedures

Unit amplification

AC1.1: Describe the information about customers' behaviour that is relevant to sales

- *To include:* purchasing patterns linked with specific customer types; seasonal demands; emerging customer trends with regard to specific goods or services; quality and type of service demanded by customers; price ranges most favoured by customers; impact on customer buying as a result of discounts or special offers

AC1.2: Explain the nature of competitors' sales activities

- *Competitors will constantly review their policies on:* pricing structures; quality standards; market share; strength of brand/reputation; after sales service; new initiatives; products or services; seasonal demand

AC1.3: Explain the relevance of information from the external business environment to sales

- *To include:* analysis of qualitative and quantitative data allows companies to give short term and long term projections of sales; provides a clearer understanding of their proposition vs their closest competitors; refining pricing structures; clarifying which initiatives/offers impact sales; improve quality; service and delivery; gain competitive edge; enter new markets

AC1.4: Describe sources of business information relevant to sales

- *To include:* marketing department records; customer records; market research (commissioned and non-commissioned); surveys; trade organisation information; University research projects; case studies; social media data; channel partner sales data

AC2.1: Describe the customer base of the organisation

- *The knowledge to meet this AC depends on the particular organisational requirements and context. Learners need to apply the knowledge specific to their organisation to meet this AC.*

AC2.2: Explain organisational information storage procedures

- *The knowledge to meet this AC depends on the particular organisational requirements and context. Learners need to apply the knowledge specific to their organisation to meet this AC.*

AC2.3: Explain organisational procedures for communicating sales-based information to the sales team

- *The knowledge to meet this AC depends on the particular organisational requirements and context. Learners need to apply the knowledge specific to their organisation to meet this AC.*

Information for tutors

Suggested resources

Websites

www.bookboon.com – the bookboon website provides free eBooks and textbooks for download, includes books on the topic of sales planning

www.businessballs.com – the business balls website provides free career help, materials and tools, including resources around the topic of sales planning

Assessment

To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria and the requirements of the Assessment Strategy.

To ensure that the assessment tasks and activities enable learners to produce valid, sufficient, authentic and appropriate evidence that meets the assessment criteria, centres should apply the *Unit Assessment guidance* and the requirements of the Assessment Strategy below.

Wherever possible, centres should adopt a holistic approach to assessing the units in the qualification. This gives the assessment process greater rigour and minimises repetition, time and the burden of assessment on all parties involved in the process.

Unit assessment requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for 2010 Sales Standards, in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions; this includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

Unit assessment guidance

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements of the unit. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

Evidence to achieve this unit should come from the learner's work activities in prioritising information for sales planning.

Evidence to demonstrate achievement of learning outcomes 3 and 4 is likely to come from a combination of reviewing the learner's work products, witness testimony and professional discussion or reflective account. The learner's work products could include documents relating to the business audit, copies of information obtained from various sources contributing to the business audit and analysis documents detailing where the learner has monitored and identified trends and developments against agreed criteria, which impact on business and sales activities. The work products should be reviewed by the assessor and used to support the professional discussion to evidence the knowledge and understanding underpinning the learner's performance. Within the professional discussion, the learner could discuss the process they follow in order to prioritise the internal strengths and weaknesses, and external opportunities and threats the organisation faces in relation to sales objective (AC3.3), what the agreed criteria are within the organisation for monitoring trends and developments that impact on business and sales activities and how they do this (AC4.1) and how to ensure that sales information is communicated to those who need it and their organisation's procedures that this has to be carried out in accordance with (AC4.3). Alternatively, a reflective account could be used in a similar manner to assess the underpinning knowledge and understanding. Witness testimony from colleagues and the line manager should also be used to confirm that the learner has consistently met the requirements over a period of time, as well as met organisational requirements.

Evidence to achieve learning outcomes 1 and 2 would best come from a professional discussion. If a professional discussion is used for learning outcomes 3 and 4, then it would be best to integrate the assessment of these learning outcomes, therefore giving the learner the opportunity to link and apply their knowledge to workplace activities. For example, the learner could discuss the types of information about customers' behaviour that is relevant to sales within their organisation and how they use this in order to support sales (AC1.1), information from the external business environment, and how this is relevant to supporting sales within their organisation (AC1.3) and their organisational procedures for communicating sales-based information to the sales team and how they follow these (AC2.3). The professional discussion with the learner must be in sufficient depth and breadth to meet the level of demand within AC1.1 to AC2.3.

Evidence of Recognition of Prior Learning (RPL) can also be used within the unit to confirm competence. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.