



Australian Government

Department of Education, Employment and Workplace Relations

SIRXSL009A Manage sales teams

Revision Number: 1

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Modification History

Not applicable.

Unit Descriptor

Unit descriptor This unit describes the performance outcomes, skills and knowledge required to manage a number of teams to achieve business objectives and optimal customer satisfaction with service and sales coverage.

Application of the Unit

Application of the unit This unit requires senior sales personnel or team leaders to set, manage and review sales team targets, performance and territory management in accordance with business policy and relevant legislation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability skills The required outcomes described in this unit contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit is packaged will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency. Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Review sales team performance and procedures.	1.1 Obtain <i>reports</i> from <i>sales teams</i> in relevant detail, format and at agreed times. 1.2 Analyse and action sales team reports. 1.3 Review sales team visit procedures. 1.4 Determine sales team service procedures. 1.5 Analyse sales, costs and profits by <i>territory</i> , sales team and <i>customer group</i> . 1.6 Review performance using business procedures for assessing an individual's progress against performance indicators, career plans and development plans.
2 Manage sales team territory coverage.	2.1 Analyse current business position in territory and <i>communicate</i> to sales teams. 2.2 Ensure <i>territory coverage plan</i> delivers sales and service targets detailed for each territory.

ELEMENT	PERFORMANCE CRITERIA
	<p>2.3 Devise sales structures within and across territories.</p> <p>2.4 Determine staff and resource requirements for territory coverage.</p> <p>2.5 Set service levels for territories.</p> <p>2.6 Allocate sales representatives to meet market needs.</p> <p>2.7 Conduct regular reviews of territory coverage plans (including staff levels, targets and frequency of visits).</p> <p>2.8 Communicate amendments and changes to territory coverage plans to relevant personnel.</p>
<p>3 Organise sales staff according to legislative obligations.</p>	<p>3.1 Determine legislation and requirements affecting sales staff.</p> <p>3.2 Correctly describe provisions under industrial relations acts and legal requirements that affect day-to-day management of sales teams.</p> <p>3.3 Ensure management of sales teams complies with industrial relations requirements and business policy and procedures.</p> <p>3.4 Stimulate performance by using reward and compensation packages developed for sales teams.</p>
<p>4 Monitor product or service price and cost structures.</p>	<p>4.1 Collect information on competitors' pricing.</p> <p>4.2 Report pricing activity to relevant personnel.</p> <p>4.3 Communicate adjustments or changes required to current price or performance objectives and projections to relevant personnel (in-company, suppliers and customers).</p>
<p>5 Monitor and reset sales team objectives.</p>	<p>5.1 Set and review budgets and quotas for sales teams and individuals.</p> <p>5.2 Support and coordinate sales team meetings.</p> <p>5.3 Action outcomes from sales team meetings according to business policy and procedures.</p> <p>5.4 Conduct regular reviews to monitor implementation of</p>

ELEMENT**PERFORMANCE CRITERIA**

sales team meetings outcomes.

- 5.5 Report back to sales teams on actions completed.
- 5.6 Review sales and pricing strategies to support revised sales and service objectives.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

The following skills must be assessed as part of this unit:

- interpersonal communication skills to:
 - manage sales team territory coverage
 - communicate pricing activity and adjustment or changes to relevant personnel
 - support and coordinate meetings, including making presentations, through clear and direct communication
 - ask questions to identify and confirm requirements
 - share information
 - give instructions
 - use language and concepts appropriate to cultural differences
 - use and interpret non-verbal communication
- numeracy skills in regard to:
 - interpreting and maintaining data
 - reviewing budgets and quotas
 - calculating costs and pricing arrangements
- planning
- leadership skills, including ability to supervise and delegate tasks to sales teams.

The following knowledge must be assessed as part of this unit:

- principles and techniques in interpersonal communication
- principles and techniques in leadership
- group facilitation
- relevant performance indicators and requirements within:
 - sales plans
 - promotional plans
 - marketing plans
 - business plans
 - strategic plans
 - existing staff and associated sales team resources
 - industrial and employee relations
- principles and techniques in performance analysis and assessment
- principles and techniques in strategic and procedural development and implementation

REQUIRED SKILLS AND KNOWLEDGE

- OHS aspects of job
- relevant commercial law and legislation.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- prepares action plans for sales teams based on achievable sales targets
- manages sales team resources and requirements to budget
- demonstrates ability to work with team leaders, staff and managers to achieve priority tasks and strategic responsibilities affecting sales teams
- manages sales teams to achieve market, product or service, and territory targets in accordance with business policy and relevant legislation
- reviews and reports on sales team activity and feedback
- accurately and effectively communicates summary information from work outputs to senior and junior colleagues.

EVIDENCE GUIDE

Context of and specific resources for assessment

Assessment must ensure access to:

- a sales workplace environment
- relevant documentation, such as:
 - policy and procedures manuals
 - sales and service delivery targets and plans
 - records of sales and service
 - legislation and statutory requirements
 - industry codes of practice
 - OHS legislation and codes of practice
- sales teams.

Methods of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- observation of the candidate in the workplace
- third-party reports from a supervisor
- customer feedback
- written or verbal questioning to assess knowledge and understanding
- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Assessing employability skills

Employability skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts.

Employability skills embedded in this unit should be assessed holistically in the context of the job role and with other relevant units that make up the skill set or qualification.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below.

Sales team ***reports*** may contain information on:

- purchase requests and orders
- records of supplier performance
- competitor activities
- recalls
- product problems
- display disputes
- business customer requests
- end consumer complaints
- sales contact history.

Sales teams may include:

- full-time, part-time, casual or contract staff
- people from a range of social, cultural and ethnic backgrounds
- people with varying degrees of language and literacy levels.

Territory may be defined by:

- size, type and location of customers
- demographic parameters
- territory size, location and geographic spread
- account customers.

Customer groups may include:

- new or repeat contacts
- external and internal contacts
- customers with routine or special requests
- people from a range of social, cultural and ethnic backgrounds and with varying physical and mental abilities
- end consumers
- business customers.

RANGE STATEMENT

Communication may include:

- verbal
- individuals or groups
- formal or informal meetings
- written correspondence, memos
- email, fax, telephone.

Territory coverage plan may take into account:

- relevant business policy and procedures
- relevant legislation and statutory requirements
- types of products and services provided
- size, type and location of business
- business merchandise range
- characteristics of the specific products or services
- customer demographics
- customer confidence and expectations.

Resource requirements may include:

- people
- materials
- equipment and technology
- budget
- time
- training and development
- relevant information.

Relevant personnel may include:

- supervisor and manager
- team members.

RANGE STATEMENT

Legislation and requirements
affecting sales staff may include:

- equal employment opportunity (EEO)
- Australian apprenticeships
- disciplinary procedures
- awards and agreements
- wages and conditions
- Trade Practices and Fair Trading Acts
- environmental protection legislation
- OHS requirements
- transport, storage and handling of goods
- pricing procedures, including GST requirements
- privacy laws
- sale of second-hand goods.

Business policy and procedures
in relation to:

- employee relations and staff development
- sale of products and services
- strategic planning and evaluation
- pricing.

Reward and compensation packages
may include:

- positive feedback presentation to junior colleagues, peers and management
- prizes
- certificates
- financial bonuses
- sales commissions
- positive reinforcement through articles on performance in newsletters.

Review of budgets and quotas
for sales teams may be based on:

- feedback
- performance
- forecasts.

Unit Sector(s)

Sector

Cross-Sector

Competency field

Competency field Sales