



Australian Government

Department of Education, Employment and Workplace Relations

SIRXSLS009A Manage sales teams

Revision Number: 2

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Modification History

The version details of this endorsed unit are in the table below. The latest information is at the top.

Release	Comments
Second Release	Editorial updates

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

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

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Nil

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements and Performance Criteria

Element

Performance Criteria

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

1. Review sales team performance and procedures.
 - 1.1. Obtain **reports** from **sales teams** 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 **territory**, sales team and **customer group**.
 - 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 **communicate** to sales teams.
 - 2.2. Ensure **territory coverage plan** delivers sales and service targets detailed for each territory.
 - 2.3. Devise sales structures within and across territories.
 - 2.4. Determine staff and **resource requirements** for territory coverage.
 - 2.5. Set service levels for territories.
 - 2.6. Allocate sales representatives to meet market needs.
 - 2.7. Conduct regular reviews of territory coverage plans (including staff levels, targets and frequency of visits).
 - 2.8. Communicate amendments and changes to territory coverage plans to **relevant personnel**.
3. Organise sales staff according to legislative obligations.
 - 3.1. Determine **legislation and requirements** affecting sales staff.
 - 3.2. Correctly describe provisions under industrial relations acts and legal requirements that affect day to day management of sales teams.
 - 3.3. Ensure management of sales teams complies with industrial relations requirements and **business policy and procedures**.
 - 3.4. Stimulate performance by using **reward and compensation packages** developed for sales teams.
4. Monitor product or service price
 - 4.1. Collect information on competitors' pricing.

- and cost structures.
- 4.2. Report pricing activity to relevant personnel.
- 4.3. Communicate adjustments or changes required to current price or performance objectives and projections to relevant personnel (in company, suppliers and customers).
- 5. Monitor and reset sales team objectives.
 - 5.1. Set and **review budgets and quotas** for sales teams and individuals.
 - 5.2. Support and coordinate sales team meetings.
 - 5.3. Action outcomes from sales team meetings according to business policy and procedures.
 - 5.4. Conduct regular reviews to monitor implementation of 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

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

Required skills

- interpersonal 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 to:
 - interpret and maintain data
 - review budgets and quotas
 - calculate costs and pricing arrangements
- leadership skills to supervise and delegate tasks to sales teams

Required knowledge

- principles and techniques in:
 - interpersonal communication
 - leadership
 - group facilitation
 - performance analysis and assessment
 - strategic and procedural development and implementation
- 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
- Work Health and Safety (WHS) aspects of job
- relevant commercial law and legislation

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.

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
 - WHS 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.

**Guidance information for
assessment**

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

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.

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

Resource requirements may include:

- business merchandise range
- characteristics of the specific products or services
- customer demographics
- customer confidence and expectations.
- people
- materials
- equipment and technology
- budget
- time
- training and development
- relevant information.

Relevant personnel may include:

- supervisor and manager
- team members.

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
- WHS 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)

Cross-Sector

Competency field

Sales