



# CPSA Sales Institute Key Competencies in Sales

The following validated key competencies and tasks were developed by the Canadian Professional Sales Association in co-operation with Human Resources Development Canada. They form the foundation of the Professional Selling course and CPSA Sales Institute's designation exams. The designation process tests the knowledge and skills required to be a successful and professional-sales person, and leads to the designation CSP – Certified Sales Professional.

## **Account Management**

- Develop account plan
- Connect and navigate
- Build the "value case"
- Implement and operate

## **Business Acumen**

- Understand general business management
- Demonstrate fair competitive practices
- Demonstrate ethical behavior
- Understand and use contracts
- Understand government legislation and governing bodies
- Understand insurance and liability
- Comply with corporate policies
- Understand financials
- Think globally and act locally
- Follow industry standards

## **Communication**

- Listen effectively
- Probing questions
- Provide continuous feedback
- Communicate according to customer type
- Deliver sales presentations
- Written communication
- Write sales letters
- Write proposals
- Deliver training to customers
- Educate others
- Conduct telephone sales calls
- Identify communication vehicles
- Facilitation

## **Consultative Selling Process**

- Prospect for potential customers
- Plan for the initial contact
- Contact the prospect
- Plan the sales call
- Open the sales call
- Uncover needs
- Present solutions/options
- Address objections
- Use the sales tools
- Ask for the business
- Negotiate terms
- Follow up the sale

## **Knowledge Management**

- Know more about yourself and clients
- Increase efficiency, speed at which you work
- Facilitate the transfer of knowledge
- Distinguish the key difference between information and knowledge
- Know how to analyze information

## **Customer Value Creation**

- Manage your knowledge of the customer and market
- Create value for every sales opportunity
- Communicate the value proposition to customers
- Leverage your organization's customer value chain
- Create and manage a customer value plan
- Measure the value realized

## **Local Area/Regional Marketing**

- Create your local area/regional marketing plan
- Network locally/regionally
- Create and manage a direct mail program
- Create and manage educational and promotional events
- Organize trade shows
- Enhance corporate marketing programs (print media and broadcast)
- Coordinate merchandising campaigns
- Conduct informal market research
- Conduct multi-media marketing
- Create and manage telemarketing programs
- Plan promotions

## **Product and Technical Knowledge**

- Acquire up to date product/service knowledge
- Acquire up to date technical knowledge

## **Relationship Building**

- Create a customer care process
- Develop the account
- Collaborate with customers to create service standards, warranties and guarantees
- Educate customers
- Link customers with other service/product providers within your network
- Support customer initiatives
- Appreciate your customers

## **Sales and Technology**

- Understand how to use basic technology
- Leverage the internet as a valuable resource
- Understand your organization's security policies
- Understand the implications of technology on your customers
- Leverage technology in your role

## **Sales Administration**

- Generate sales administration/operations reports
- Provide feedback
- Analyze, read and interpret sales information
- Track orders
- Maintain support systems

## **Self-Development**

- Create a personal vision/mission
- Balance your life
- Manage your attitude
- Practice self-discipline
- Manage your time and activities
- Manage your professional development
- Manage your career
- Manage stress
- Focus on knowledge management

## **Strategic Sales Planning**

- Understand the corporate business plan/department objectives
- Analyze and segment the market
- Research the competition
- Analyze individual existing customers
- Analyze products/services
- Negotiate your sales target
- Create your sales strategies
- Set objectives to achieve your sales targets

## **Time and Territory Management**

- Priority time management
- Forecast sales results
- Analyze customer segments
- Manage sales funnel
- Manage territory/customer
- Manage your sales activities