CANADIAN PROFESSIONAL SALES ASSOCIATION

PRIOR LEARNING ASSESSMENT AND PORTFOLIO DEVELOPMENT

GUIDE BOOK

To Assist Individuals Seeking Accreditation as a Certified Sales Professional (CSP)

CONTENTS

INTRODUCTION TO CPSA PRIOR LEARNING ASSESSMENT AND RECOGNITION (PLAR) PROCESS

The Canadian Professional Sales Institute was established in 1994 by the Canadian Professional Sales Association (CPSA) to promote professional selling as a respected and recognized career choice. The mission of the Institute is to:

> *"Enhance the value and credibility of the sales profession through professional standards and certification."*

The Institute has established a comprehensive certification process for professional sales representatives across Canada through its Certified Professional Sales Program. Graduates of this program earn the professional designation of Certified Sales Professional (CSP). The Program is offered through accredited colleges and universities across Canada. It is also offered directly through the CPSA or as a self-study program.

To receive certification and the professional CSP designation, candidates must have

- a minimum of two years of sales experience,
- demonstrate competence in Consultative Selling*
- complete a written and oral examination administered by the CPSA Sales Institute.

* There are two options to demonstrate competence in Consultative Selling:

OPTION A: **Formal Training**. Competence will be demonstrated and confirmed throughout the examination process and by submitting a Certificate of Course Completion or Diploma along with Learning Outcomes or Course outline with your application.

The program, "Professional Selling – Skills For Sales Success", may be completed through one of CPSA's post secondary partner institutions, with the CPSA, or through self-study. Satisfactory completion of the Professional Selling Program enables qualified candidates to participate in the national examination process to achieve the CSP designation.

OPTION B: **Prior Learning Assessment and Recognition (PLAR)**. Prior learning assessment is an educational innovation that has been gaining attention world wide over the past decade as part of a global movement to reform education and training. *PLAR is a process that involves the identification, documentation assessment and recognition of learning acquired through formal and informal study. This may include work and life experiences, training, independent study, volunteering, travel, hobbies and family experiences.* The recognition of prior learning can be used toward the requirements of an academic or training program, occupational/professional certification or for employment/labour market entry purposes. PLAR is based on the assumption that significant learning can and does occur outside of the classroom and that such learning should be evaluated for credit by educational institutions, in the workplace for hiring and promotion and for professional accreditation and certification.

This Guide Book outlines a step-by-step process to help you organize your learning related to the competencies required for the CSP designation. The main method of preparing these materials as described in the Guide Book is the preparation of a professional portfolio. A portfolio is a record kept in a binder, a file or a folder of your prior learning achievements -- what you know and can do- related to the competencies of a Certified Sales Professional.

To achieve this Certification you must demonstrate your competence in the Consultative Selling Process, which constitute the skills and knowledge required by Canadian sales professionals as articulated by the CPSA Sales Institute.

Further to this, upon submission and review, a PLAR candidate will be examined by a certified CPSA examiner based on the evidence submitted. During the course of the oral assessment, the CSP candidate may be examined on other sales practice areas that may include:

1. Communication
2. Marketing
3. Relationship Building
4. Account Management
5. Knowledge Management
6. Customer Value Creation
7. Product and Technical Knowledge
8. Sales and Technology
9. Sales Administration
10. Strategic Sales Planning
11. Time and Territory Management
12. Self-Development
13. Business Acumen

THE PORTFOLIO

A portfolio is a record of your learning from work experience and personal development related to your employment as a sales professional that has been built up over a period of time. It is used to support your claim of competence. It is a file or folder, which contains:

- a 1-2 page narrative on your involvement in professional sales related to CSP competencies;
- an up-to-date resume;
- official transcripts for courses related to the Consultative Selling competency;
- program descriptions and course outlines of courses taken related to the Consultative Selling competency;
- letters of verification from supervisors, colleagues, employers, clients and others attesting to your skills and knowledge related to the Consultative Selling competency; and
- work samples, performance appraisals, products and documents produced by you related to the Consultative Selling competency.

The portfolio will enable you to give a comprehensive account of your skills and abilities in relation to the Consultative Selling competency. In order to do this it should:

- be structured in a clear and logical way;
- be supported by evidence from colleagues, clients and others e.g. managers;
- be easy to read and understand; and
- allow you some freedom of expression.

DEVELOPING YOUR PORTFOLIO

One of the most difficult tasks is deciding what to include in your portfolio. The art of building a portfolio is a learning process in itself and usually includes the following stages:

- familiarization with the Consultative Selling competency for which you are seeking credit;
- a review of your existing abilities and your learning related to the CSP designation;
- self-assessment using the CSP skills and knowledge self-assessment scale;
- identifying personal development needs;
- identifying other sources of help and guidance;
- identifying appropriate sources of evidence;
- identifying opportunities to maximize evidence generation;
- planning and organizing competencies to be assessed;
- compiling the evidence; and
- presenting your portfolio for assessment.

ORGANIZING YOUR PORTFOLIO

The way in which you organize your portfolio is crucial. The Assessor should find the portfolio easy to follow and should readily be able to identify the evidence that supports your claim of competence.

There should be a contents page which outlines each section of the portfolio. Each section of the portfolio should represent the Consultative Selling competency for which you are seeking credit toward the CSP designation. (See sample format on page 9)

Within each section you should place the evidence collected. This should be completed, signed, dated and appropriately cross-referenced to the contents page. (This can be done numerically or with colour codes.)

MAKING JUDGMENTS ABOUT YOUR PORTFOLIO

Establishing that the items of evidence collected are good enough to be taken into account when making an assessment decision requires that assessors check that the evidence is:

- valid and directly relates to the Consultative Selling competency;
- meeting each of the specifications outlined within the standards and
- authenticity i.e. is your own work.

AUTHENTICITY OF THE EVIDENCE IN YOUR PORTFOLIO

The assessor must be sure that all of the evidence is your own work. It may be necessary for the assessor to ask questions about the evidence, which you have provided, or for you to collect further evidence in order to confirm that the content of your portfolio is authentic.

For example, when looking at a computer printout, it can be difficult to tell if an item of evidence is entirely your own work or it may be difficult to differentiate your own work from that produced by others in your work team. In these cases a "**Letter of Verification**" (Page 6) could confirm the authenticity of your evidence.

IS THE EVIDENCE IN YOUR PORTFOLIO SUFFICIENT?

Sufficiency has been achieved if:

- all of the criteria within the Consultative Selling competency has been achieved;
- your evidence is considered to be current and up-to-date;
- your performance is consistent and can be demonstrated over a period of time; and

- you can demonstrate that you have the relevant knowledge and understanding and can apply it to the standards set by the CPSA Sales Institute.

Competence is about being able to perform to the standard required for the CSP designation. It would be inaccurate to infer that you meet all of the required outcomes solely on the basis of your knowledge and understanding. Your evidence must demonstrate that you can apply this knowledge and understanding to your work in the sales profession, which meets the requirements for the CSP designation.

The amount of evidence required will depend on a number of factors. An absolute minimum would be to have one item of evidence for each component within the competency, provided this met each of the criteria outlined within the CSP requirements. Generally, a single item of evidence is likely to demonstrate your competence. However, a number of items collected over a period of time may be submitted to demonstrate this.

IS THERE EVIDENCE OF KNOWLEDGE AND UNDERSTANDING?

Knowledge and understanding are critical to competent performance. You must be able to demonstrate that you have the appropriate supporting knowledge and understanding related to the CSP designated outcomes. The examiner will ask you questions relating directly to the evidence submitted as well as other competency areas. This will allow the examiner to determine your knowledge and understanding related to CSP designated outcomes.

IS THE EVIDENCE IN YOUR PORTFOLIO CURRENT?

It is important to recognize that even if your evidence meets the Consultative Selling competency, it may not demonstrate that you are currently competent if it was produced some years ago.

It is essential that your evidence show current competence. If the examiner is not 100 % sure of this, it may be necessary for you to submit other sources of evidence in the overall package. e.g. Letters of Verification, certificates, reports, products, etc. related to the Consultative Selling competency for which you are seeking credit.

VERIFICATION LETTERS

Verification letters can provide an indirect, authenticated account of your performance in the world of professional sales especially as it relates to the outcomes of the specific Consultative Selling competency for which you are seeking credit. They may be collected from colleagues, supervisors, managers, customers, suppliers, etc. Verification letters should:

- be specific to the Consultative Selling competency;
- give a brief description of the circumstances and context of the observation;
- give a brief background to the observed activity; and
- identify aspects of the competence demonstrated and how it relates to the Consultative Selling process.

Letters of verification may be used in a variety of ways in attesting to your performance. Sometimes they may simply authenticate a piece of work as having been produced by you. In other cases, they may provide an account of your performance and comment on it in relation to the Consultative Selling competency. It is important that assessors are familiar with the competencies being assessed, and are able to comment authoritatively on your performance in those areas.

Before accepting evidence from letters of verification, the examiner will need to:

- judge their authenticity and validity;
- check that the testimonies are clear about the competencies being covered; and
- check that the verifier(s) can be contacted for authentication of their testimony, if necessary.

LETTER OF VERIFICATION - CSP Key Competencies

Applicant: ______________________________________ Student No.: ____________________________

1. Declaration:

I have read and understood the competencies for the CSP program and am able to state that the above applicant can meet the following competencies related to the competencies of the CSP designation:

2. Evidence to support the above statement:

I am able to state this because.........

3. Details of person writing the Letter of Verification:

Name: ____ Designation:______________________________

Qualifications:___________________________________ Telephone: _______________________________

Relationship of Verifier to Applicant: ____

Contact address and Telephone Number: ____

____

E-mail:____

Signature of Verifier: _____________________________ Date:_____________________________________

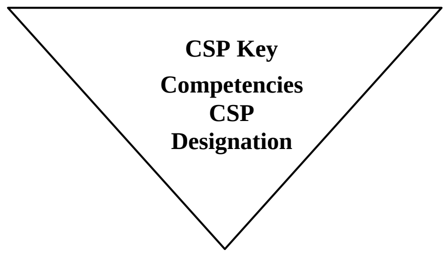
Applicant's Signature: ____________________________ Date:_____________________________________

Please Note: *You may be contacted by CPSA to confirm your comments.*

TRIANGULATION OF EVIDENCE

Best practice in the assessment of prior learning dictates that **diverse** sources of evidence be used to support one's claims of competence in relation to CSP competencies. For every CSP competency area or grouping of competencies it is important to provide at least three sources of evidence (documentation) to support your request for Prior Learning Assessment credits.

Knowledge Evidence
gathered from:
- oral questioning
- open written tests
- structured written tests
- projects or assignments



Performance Evidence
gathered from:
- observation in workplace
- workplace examples
- simulations
- skill tests

Evidence from Prior Learning
gathered from:
- reports, documents, products
- designs
- computer programs
- testimonials from employers, clients
- certificates, etc.
- transcripts, course outlines from courses taken related to professional sales

SUMMARY

The various methods which might be used to generate evidence toward the requirements needed to achieve the CSP designation have been described. These issues are now summarized in the form of a checklist that you can use to review the content of your portfolio.

1. Is the evidence relevant to the key competencies for the CSP designation?
2. Does the evidence cover all of the criteria?
3. Do you have the necessary supporting knowledge and understanding?
4. Is your evidence up to date?
5. Can you show that the evidence is real and not made up?
6. Is the evidence the product of your own work?
7. Have you maintained the confidentiality of any sensitive information?
8. Have you laid out your evidence in a clear and consistent way?
9. Will the examiner be able to follow the evidence you present in your portfolio?

Now please list the evidence you have, using the Evidence Grid below.

You should aim to provide at least three different sources of evidence (triangulation of evidence) for each key competency so the examiner can build a 360 degree view (a total picture) of your skills and abilities.

EVIDENCE GRID

Check Evidence Available:
(see key below)

CSP Program Competencies	**1**	**2**	**3**	**4**	**5**

Evidence Key

1. Certificates/Transcripts
2. Learning Records
3. Workplace products
4. Letter(s) of Verification
5. Evidence Logs

Comments (e.g. other forms of evidence not covered by evidence key):

Applicant's Signature: ____________________________ Date:_________________________

Examiner's Signature:_____________________________ Date:_________________________

SAMPLE OF POSSIBLE PORTFOLIO FRAMEWORK

Page 1 ***Title Page***

Portfolio of Prior Learning Related to Key
Competencies of the Certified Sales
Professional (CSP) designation

Presented by:

Submitted to:

Competencies for which PLAR Credits are requested:

- **the Consultative Selling competency**

Date:

Page 2 ***Table of Contents***

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Page 3 ***Narrative on Involvement in Professional Sales related to CSP Competencies***

The narrative should provide the context for your request for PLAR credits in Consultative Selling. It should briefly summarize your experience related to your career in sales, highlighting your skills and knowledge in comparison to the Consultative Selling process.

Page 4 ***Resume***

Page 5 ***Competency Area for which PLAR Credits are requested***

Title of Competency e.g. Consultative Selling

- Evidence to Demonstrate Competence

PRIOR LEARNING ASSESSMENT AND RECOGNITION (PLAR) SELF-ASSESSMENT SCALE

This self-assessment tool was developed to help you determine as accurately as possible whether to seek Prior Learning Assessment and Recognition credits for the in the CPSA Sales Institute's Certified Sales Professional program. Upon completion of the self-assessment scale (rating 0-5) and after consultation with CPSA staff, those individuals who decide to pursue a PLA credit should be able to then put together their portfolio for submission.

The scale provides a comprehensive profile of the major skill and knowledge categories for the Consultative Selling competency identified by the CPSA Sales Institute, needed for effective work in the sales profession. There are several other advantages to both you and the CPSA in conducting this self-assessment. The self-assessment process:

- assists you to assess your skills and knowledge related to the sales profession and to identify existing skills and gaps;
- creates a milieu in which the CPSA can discuss with you concrete PLAR options; and
- enables you to take responsibility for identifying and documenting your skills and knowledge in professional sales and to receive credit for them.

This scale is intended to serve only as a guide to assist experienced sales professionals with support from CPSA staff, to make informed choices about whether the PLAR process is a realistic activity for them. Upon completion of this scale it is expected that you will share the results with CPSA staff and make a final decision whether to pursue the PLAR process for the CSP designation. It is important for those who undertake this self-assessment activity to realize that high ratings do not guarantee that they will receive a credit for any competency. High ratings may indicate those competencies for which to prepare a portfolio. Consistently scoring at the upper levels on any of the Consultative Selling tasks (e.g. 4's, 5's) is an indication that these areas might be the most appropriate to pursue as a credit via the PLAR process.

CPSA assessors may request additional evidence (documentation) if you decide to develop a PLAR portfolio. This information is intended to help you validate your skills and knowledge related to the CSP competencies for which you are seeking PLAR credits.

CPSA SALES INSTITUTE

KEY COMPETENCIES FOR SALES PROFESSIONALS

SELF-ASSESSMENT SCALE

SCALE	0	1	2	3	4	5

RATING

0 - No experience
1 - Have observed or been oriented to
2 - Can participate in and assist
3 - Can do this with minimum assistance
4 - Can successfully do this without assistance
5 - Can successfully do this without assistance and lead others in doing it

CONSULTING SELLING PROCESS

Competency
Apply a variety of selling techniques, from planning the sales call, to presenting solutions and adding value for the client, demonstrate how to close the sale and how to build relationships through sales follow-up techniques.

Tasks (Components to be Achieved Within the Competency)	**Sub-tasks**	**0**	**1**	**2**	**3**	**4**	**5**	**Possible Evidence**
▪ Prospect for potential customers	✓ List sources for developing prospect lists (existing customer lists, lost business, referrals, databases, trade associations, trade magazine, networking, etc.) ✓ Utilize electronic customer databases/contact management software ✓ Observe where competitors are calling and use this information for prospect lists ✓ Develop the prospect list ✓ Research general information about prospects to determine potential ✓ Prioritize the prospect list based on the research ✓ Update and revise the list regularly ✓ Liaise with call/contact centre							
▪ Plan for the initial contact	✓ Establish and maintain prospect files ✓ Obtain strategic information about the prospect's situation ✓ Qualify the prospects (need or want, type and size of business, financial condition, appropriateness of your product/service) ✓ Learn about the prospect ✓ Identify the potential opportunities ✓ Set contact objectives (primary goal, secondary goal, etc.) ✓ Review the industry trends, challenges, issues ✓ Plan daily prospect activities							

Tasks (Components to be Achieved Within the Competency)	**Sub-tasks**	**0**	**1**	**2**	**3**	**4**	**5**	**Possible Evidence**
▪ Contact the prospect	✓ Write a personal letter, e-mail ✓ Telephone the prospect ✓ Ask the person who provided the referral to set up an appointment or ask for and obtain the appointment ✓ Use the planned sales strategies and tactics ✓ Record details of the conversation							
▪ Plan the sales call	✓ Review and analyze prospect file ✓ Identify the potential opportunities ✓ Set the sales call agenda ✓ Set the sales call objectives (primary goal, secondary goal, etc.) ✓ Determine sales strategies/tactics to achieve your objective ✓ Rehearse your approach ✓ Reconfirm the appointment							
▪ Use of sales tools	✓ Collect all the sales support materials ✓ Analyze for prospect use ✓ Personalize the materials you leave with the prospect (add your name and phone number, highlight key information, etc.) ✓ Select and use the sales tools at the appropriate time during the process to emphasize key messages and solutions ✓ Have all sales tools accessible and be pro-active							

Tasks (Components to be Achieved Within the Competency)	**Sub-tasks**	**0**	**1**	**2**	**3**	**4**	**5**	**Possible Evidence**
▪ Open the sales call	✓ Greet the prospect ✓ Build rapport ✓ Communicate your sales call objective ✓ Listen to prospect's objectives ✓ Confirm agreement to objectives ✓ Confirm the potential							
▪ Identify needs	✓ Ask the questions you have planned ✓ Listen actively ✓ Encourage responses through body language (leaning forward) and verbal language ("tell me more about that") ✓ Focus the discussion on the interests and needs of the prospect ✓ Reconfirm needs frequently ✓ Use effective feedback skills (i.e. paraphrasing, summarizing) to check understanding ✓ Involve the prospect fully (i.e. ask the prospect to identify the benefits of your product/service) ✓ Uncover buyers' selection criteria ✓ Identify budgets							
▪ Present solutions/options of value/perceived value	✓ Match products and services to prospect needs and/or opportunities ✓ Meet with key decision makers ✓ Use a feature/benefit strategy							

Tasks (Components to be Achieved Within the Competency)	**Sub-tasks**	**0**	**1**	**2**	**3**	**4**	**5**	**Possible Evidence**
▪ Effectively address objections	✓ Anticipate possible objections and preplan your response ✓ Listen closely for the signals that indicate an objection ✓ Identify the different sources of objections (cost, skepticism, lack of understanding, etc.) ✓ Acknowledge the objection immediately ✓ Clarify the objection ✓ Detach yourself from the objection ✓ Specifically address the objection to satisfy concerns (provide more information, offer proof, restate features and benefits, etc.) ✓ Check for agreement that the objection has been dealt with ✓ Provide third-party or testimonial style examples ✓ Offer alternatives if appropriate ✓ Enhance the value of other products/services if appropriate ✓ Adjust presentation or change direction if required							
▪ Ask for the business	✓ Identify and match various decision-making styles ✓ Check for more questions, concerns ✓ Summarize the benefits ✓ Establish agreement ✓ Set the stage for additional business ✓ Reconfirm the buying decision							

Tasks (Components to be Achieved Within the Competency)	**Sub-tasks**	**0**	**1**	**2**	**3**	**4**	**5**	**Possible Evidence**
▪ Follow up the sale with customer service	✓ Reinforce the buying decision ✓ Analyze the sales call for your own development (what went well, what would you change) ✓ Fulfill every commitment ✓ Stay connected ✓ Ask for referrals							