



# SALES LEADERSHIP

COMPETENCY FRAMEWORK

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# SALES LEADERSHIP COMPETENCY PROFILE

## WHAT IS A COMPETENCY?

A grouping of related knowledge, skills, and abilities that enable a professional to perform effectively in a certain aspect of their job, is called a competency. An important aspect of competence is the idea of performance; the observable actions taken by a competent professional which require some combination of knowledge, skill, or understanding to do so effectively. In the sales leadership competency framework, performance indicators are documented within each of the sub-skill areas and are organized to present a thorough and comprehensive summary of the skills required to be a proficient sales leader through the completion of requisite education programs and 2 years of on-the-job experience in team management or leadership.

These indicators are denoted as numbered statements that begin with a “**P**” for “**Performance**” and outline the body of skills pertinent to proficient practice.

The necessary knowledge that a competent sales leaders would processes in order to perform certain aspects of their job are denoted as numbered statements that begin with a “**K**” for “**Knowledge**” in each competency area.

## WHAT ARE COMPETENCY FRAMEWORKS USED FOR?

The Competency framework describes the competencies for the CPSA Institute graduated certification program. Competency frameworks:

- › Provide guidance to post-secondary educators and other training providers who wish to design programs that produce graduates with the skill sets that employers demand;
- › Guide professional designation candidates to understand what is expected of them when enrolled in a CPSA Institute accredited education program;
- › Guide the development of job descriptions and interview tools; and,
- › Are the basis for professional designation examinations.

30 questions. 30 minutes.

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# SALES PLANNING

## 1.1 ENGAGE IN STRATEGIC PLANNING

### **A competent practitioner must be able to:**

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- P1. Communicate organization vision, values, goal and measures to sales team
- P2. Leverage strategic planning models to guide sales planning
- P3. Analyze current and future state of the industry environment, including:
  - future direction of your competitors and potential threats or opportunities
- P4. Research basic sales organization pitfalls and challenges
- P5. Leverage creative thinking to identify new solutions
- P6. Communicate upward and throughout the organization to inform organizational planning
- P7. Adapt to new information and create change
- P8. Develop implementation and communication plan to educate team members about selling strategy
- P9. Ensure alignment of selling strategy to company or product roadmap
- P10. Engage in process of market segmentation aligning service and product offerings to market segment
- P11. Build organizational buy in and supports for selling success to ensure that all other departments are behind the selling vision and priorities

### **A competent sales leader must know:**

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- K1. Corporate business plans
- K2. Customer growth and retention versus new customer acquisition
- K3. Strategic Analysis models (e.g. SWOT – Analysis of Strengths, Weaknesses, Opportunities, and Threats)

## 1.2 PLANNING ACCOUNTS, TERRITORIES, AND TARGETS

### A competent sales leader must be able to:

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- P1. Conduct internal analysis and performance history by product line, territory, sales person, and account as required
- P2. Analyze customer buying behavior to inform sales planning
- P3. Know the total potential for your accounts
- P4. Develop and implement process to identify top customers
- P5. Develop and implement a strategic account planning process to map out customer-specific sales plans
- P6. Developing a predictive model to indicate pipeline health, including:
  - › win rates;
  - › average deal size;
  - › average sales cycle length; or
  - › others variables for your business, if required.
- P7. Set and negotiate realistic, achievable targets
- P8. Provide opportunity for bottom-up goal setting within the sales team

### A competent practitioner must know:

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- K1. SMART Goals: Specific, Measurable, Assignable, Realistic, and Time-bound goal statements
- K2. Sales process models, stages, and definitions

## 1.3 EXECUTE WITH EXCELLENCE

### A competent sales leader must be able to:

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- P1. Collaborate with sales team and cross-functional team members to set leading and lagging indicators for sales performance
- P2. Identify sources for lead generation and work with marketing teams to align
- P3. Lead sales team in the development of target customer list, priority market segments, regions and accounts
- P4. Delegate actions to team members with aligned skill sets, experience, and capabilities
- P5. Identify potential bottlenecks to success and work to eliminate them
- P6. Engage and collaborate with marketing activities for planning go-to-market strategies
- P7. Assess errors in planning and implementation, learn from mistakes, and adapt plans throughout the year
- P8. Establish ongoing communication and collaboration cadence with marketing to support sales success throughout execution of the plan
- P9. Communicate openly and transparently about how the sales organization is performing in good times and bad times

### A competent sales leader must know:

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- K1. Key performance indicators and business objectives
- K2. Organization structure and cross functional teams
- K3. Leading and lagging performance indicators
- K4. Organizational strategy, strategic sales plans implementation plans and tactics

# BUILD AND LEAD THE SALES TEAM

## 2.1 STAFF PLANNING

### **A competent sales leader must be able to:**

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- P1. Recommend size and structure of sales force required to achieve goals (e.g. Inbound, outbound, sales support, etc.)
- P2. Align salesforce planning to lifestyle and preferences of current and future workforce demographics
- P3. Plan across cultural and generational characteristics of sales team members
- P4. Plan for a multitude of motivators including compensation, competition, reward, recognition and altruistic motivators
- P5. Identify opportunities for team selling and foster cross functional relationships
- P6. Develop plan for sales force skill development

### **A competent sales leader must know:**

---

- K1. Sales force job descriptions
- K2. Cultural differences within the workplace
- K3. Demographic differences within the workplace

## 2.2 RECRUIT AND SELECT SALES TEAM MEMBERS

### **A competent sales leader must be able to:**

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- P1. Develop job description and specifications
- P2. Identify suitable candidates for team member selection committees
- P3. Establish job candidate selection criteria
- P4. Source and screen job candidates
- P5. Engage with human resources supports to prepare and present job offers
- P6. Engage in contract negotiation
- P7. Adhere to regulatory requirements in employee recruitment, selection, and orientation

### **A competent sales leader must know:**

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- K1. Interview questions and style guides
- K2. Job description templates

## 2.3 ONBOARD SALES TEAM MEMBERS

### **A competent sales leader must be able to:**

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- P1. Establish job performance expectations and employee development plans
- P2. Develop and implement the onboarding journey with sufficient resources and supports to ensure every new team members is set-up for success in their role
- P3. Clarify performance standards and expectation of team members
- P4. Support transition of client files and knowledge between sales professionals
- P5. Ensure sales foundation training occurs
- P6. Ensure client call feedback is incorporated during first period of onboarding
- P7. Review and update onboarding processes to ensure the time required to achieve proficiency of role is addressed and reflective of unique industry, corporate, or product line requirements
- P8. Establish processes that ensure sales people achieve proficiency in a defined period

### **A competent sales leader must know:**

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- K1. Organization onboarding resources

## 2.4 RECOGNIZE AND INCENT SALES PERFORMANCE

### **A competent sales leader must be able to:**

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- P1. Identify potential misalignment between sales team behavior, incentive programs, and organization goals and objectives
- P2. Select performance metrics that will be used for monitoring performance and understand how these influence behaviors and link to compensation
- P3. Implement reward and recognition programs
- P4. Understand changing team member priorities and incorporate into incentive planning
- P5. Demonstrate to team members how compensation plan aligns with goals and objectives
- P6. Identify short term and long-term incentive plans
- P7. Ensure sales people are aware behavioral and performance expectations, how they will be measured, observed, and recognized

### **A competent sales leader must know:**

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- K1. Short- and long-term incentive opportunities
- K2. Organization policy and procedure
- K3. Intrinsic human motivators



# COACH FOR SALES SUCCESS

## 3.1 SUPPORT SALES ENABLEMENT

### A competent sales leader must be able to:

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- P9. Identify the cadence for individual skills development most appropriate for your sales team members
- P10. Implement sales tools and processes to accelerate sales performance
- P11. Identify business challenges that can be addressed through short and long-term training versus process improvements
- P12. Engage team members in delivering sales enablement activities to leverage real world examples, storytelling and experience sharing as part of team learning
- P13. Implement ongoing training and skill development solutions to ensure culture of continuous learning and improves sales performance
- P14. Establish linkages and ongoing communication with marketing team members to leverage tools and resources for sales enablement

### A competent sales leader must know:

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- K1. Sales training and development resources
- K2. Process for documenting and sharing experiences
- K3. Training and development resources

## 3.2 COACH TO THE SALES PROCESS

### A competent practitioner must be able to:

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- P1. Provide specific feedback on areas to improve performance and keep team members engaged
- P2. Coach to the sales process and professional skill development separately
- P3. Establish performance expectations and metrics at every stage of the sales cycle
- P4. Schedule time for reviews of sales performance at various stages of the sales cycle
- P5. Ensure coaching time is allocated to individuals at all performance levels from poor performers to top performers
- P6. Assess individual team member capabilities at various stages of the sales process or product line knowledge
- P7. Create a safe and open environment for dialogue with every sales team member
- P8. Demonstrate accountability for delivering consequences for both + ve & - ve outcomes

### A competent sales leader must know:

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- K1. Sales Process, stages, definitions
- K2. Performance metrics

### 3.3 COACH FOR SALES PERFORMANCE

#### **A competent practitioner must be able to:**

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- P1. Identified individual team member needs
- P2. Establish coaching and performance feedback cadence
- P3. Establish opportunities for peer mentoring and reverse mentoring
- P4. Participate on sales calls and provide feedback for improved performance
- P5. Collect feedback about sales team members' performance from others within the organization
- P6. Conduct formal performance appraisals
- P7. Discuss career goals with every team member to inform analysis of goal criteria and development planning
- P8. Assess sales team member readiness for sales performance coaching
- P9. Determine best model for sales performance coaching based on individual team member needs
- P10. Ask specific, situational, and open-ended questions to guide development discussion
- P11. Share your own experiences and lessons learned with team members
- P12. Engage in personality assessments for yourself and the team

#### **A competent sales leader must know:**

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- K1. Emotional Intelligences
- K2. Performance development models
- K3. Processes for coaching in the field
- K4. Personality assessments

# SUPPORT THE CYCLE OF SELLING

## 4.1 ESTABLISH SALES PROCESS

### **A competent sales leader must be able to:**

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- P1. Assess customer journey through the sales funnel
- P2. Develop and execute sales process to align with goals, objectives and priorities set in planning
- P3. Assess, update, or implement mechanisms in the sales cycle which put client needs at the forefront of sales team conversation and process mapping
- P4. Evaluate various sales models and implement the best fit for your business
- P5. Adapt sales cycle and metrics to align with organizational objectives and unique characteristics of your product, service, or industry
- P6. Lead the sales cycle within your organization with attention to economic drivers, purchase influencers, and key personas within client relationships.
- P7. Empower sales team to own the entire sales cycle and customer journey

### **A competent sales leader must know:**

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- K1. Sales methodologies and models
- K2. Stages of the sales cycle, naming and definitions
- K3. Establish methodology for sales team to document client organization structure and decision-making authorities

## 4.2 SUPPORT STRATEGIC CLIENT RELATIONSHIPS

### **A competent sales leader must be able to:**

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- P1. Work with team members to ensure that top clients have specific measurable plans for maintenance and growth
- P2. Participate in client meetings to support team members with top clients or potential clients as required
- P3. Establish methodology for sales team to document client organization structure and decision-making authorities

### **A competent sales leader must know:**

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- K1. Client relationship management system or database
- K2. Client's social style, e.g. analytical, driver, expressive, amiable
- K3. Cultural differences
- K4. Demographic differences
- K5. Importance of customer experience to build loyalty

## 4.3 ENGAGE IN SALES COMMUNICATION

### **A competent sales leader must be able to:**

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- P1. Ask clarifying an open-ended question
- P2. Repeat what you've heard to clarify understanding
- P3. Assess and adapt communication to personality types
- P4. Deliver candid, open, and honest responses in all conversations
- P5. Write reports, business cases, memos, policies, and procedures
- P6. Adapt communication style and technique to a variety of communication channels including technology enabled verbal, written, or face to face communication.
- P7. Deliver presentations which include appropriate presentation materials, storytelling, hand-outs, or whiteboarding as appropriate for the audience and setting
- P8. Facilitate meeting room management for desired outcome

### **A competent sales leader must know:**

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- K1. Presentation styles
- K2. Verbal and non-verbal communication techniques
- K3. Written communication format requirements, e.g. letter, proposal
- K4. Elements of report writing
- K5. Communication tools available, e.g. email, webcast, conference call
- K6. Emotional Intelligence

## 4.4 SUPPORT NEGOTIATIONS

### **A competent sales leader must be able to:**

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- P1. Support complex sales with multiple buyers and approval processes
- P2. Support sales teams through deal negotiation and help to overcome potential challenges
- P3. Achieve consensus on sticking points throughout the sales process
- P4. Handle conflicts and differences toward resolution
- P5. Establish feedback loop to ensure customer feedback informs continuous improvement for your entire sales team and organization

### **A competent sales leader must know:**

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- K1. Negotiation principles
- K2. Concession strategies
- K3. Risk management principles
- K4. Principals and methods of conflict resolution

# BUSINESS ACUMEN

## 5.1 UNDERSTAND YOUR COMPANY

### A competent sales leader must be able to:

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- P1. Develop organization core values, goals and objectives to empower salesforce to position solutions to clients, for example:
  - › Understand the competitive position of your own organization
  - › Understand unique value proposition
- P2. Ensure that team members follow industry or corporate standards and best practices
- P3. Participate in the development of industry standards and best-practices while developing your professional network within the industry segment
- P4. Comply with corporate policies

### A competent sales leader must know:

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- K1. Organization structures
- K2. Business basics
- K3. Competition offerings
- K4. Value proposition

## 5.2 UNDERSTAND YOUR CLIENTS BUSINESS

### A competent sales leader must be able to:

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- P1. Analyze impact of industry trends on customer business objectives or challenges
- P2. Research customer competitors
- P3. Participate in industry events important to your customer and the industry they work within
- P4. Navigate complex customer challenges or goals to assist in adapting service offering to better meet their needs

### A competent sales leader must know:

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- K1. Department objectives
- K2. Common marketplace needs and solutions

## 5.3 DEMONSTRATE FINANCIAL LITERACY

### A competent sales leader must be able to:

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- P1. Develop and manage sales department budgets
- P2. Monitor expenses (actual vs. planned)
- P3. Develop and use sales reports
- P4. Forecast sales for your areas of responsibility
- P5. Recognize all aspects of the costs related to a sale, e.g. cost of goods sold, wages (variable compensation), organizational and 3rd party expenses
- P6. Forecast deal profitability with complex variables, e.g. rebate, investment vs return
- P7. Recognize total and lifetime value of a client
- P8. Remain current on the financial trends influencing own industry and client's industry
- P9. Calculate profit margin of different product lines and sales deals

### A competent sales leader must know:

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- K1. Budgetary Expense categories
- K2. Probability, Risk, and Sales Projection formulas
- K3. Cost of goods and services
- K4. Contribution margin
- K5. Revenue
- K6. Profitability
- K7. Discounting

## 5.4 DEMONSTRATE LEGAL LITERACY

### A competent sales leader must be able to:

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- P1. Foster relationship with legal departments for support on client contract negotiation and implementation
- P2. Monitor and enforce regulatory and compliance requirements within specific industries or regions
- P3. Understand government legislation and governing bodies that impact industry sales, products, or services as required
- P4. Develop sales-related terms and conditions in collaboration with other departments
- P5. Leverage templates and contracts
- P6. Involve legal expertise when required

### A competent sales leader must know:

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- K1. Federal, provincial, or territorial legislation as required for organizational context
- K2. How different cultures view contracts and legal system
- K3. Own company's legal templates and documents
- K4. Terms and conditions
- K5. Payment terms
- K6. Purchase orders

# SALES TECHNOLOGY

## 6.1 ALIGN SALES TECHNOLOGY TO STRATEGY

### **A competent sales leader must be able to:**

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- P1. Assess new opportunities for technology in sales
- P2. Encourage team members to identify, assess, and share technologies that will support various stages of the sales cycle
- P3. Ensure technological change recommendations are aligned to strategy, vision, goals, and objectives of your organization
- P4. Act to learn about new technology and develop network of technological resources, for example:
  - › blogs or vlogs that are industry specific
- P5. Identify and prioritize recommendations for sales force automation (roles or processes) to maximize time spent on high value activities

### **A competent sales leader must know:**

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- K1. Variety of sales related technology
  - › Artificial intelligence
  - › Prospect management software
  - › Customer relationship software
  - › Presentation software
  - › Client intelligence software
  - › Software for sales process automation
- K2. Organization's security policies
- K3. Implications of technology on customers
- K4. Hardware and devices to support sales process
- K5. Technology Return on Investment calculation

## 6.2 LEVERAGE TECHNOLOGY FOR DATA AND DECISION MAKING

### A competent sales leader must be able to:

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- P1. Identify where new technology can be leveraged to generate insights:
  - › Generating insights to understand organizational sales performance
  - › Generating customer insights
- P2. Synthesize data, findings, and support team through elimination of irrelevant data (data pollution)
- P3. Integrate data analysis into sales planning and execution
- P4. Support data-driven decision making throughout the sales cycle
- P5. Harness, where appropriate, technologies for social selling, artificial intelligence or data analytics to improve sales process

### A competent sales leader must know:

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- K1. Client intelligence models and methodologies
- K2. Sources of quantitative and qualitative data
- K3. Methods of documenting client data

## 6.3 LEAD TECHNOLOGICAL CHANGE IN SALES

### A competent sales leader must be able to:

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- P1. Anticipate and adapt to an increasing rate of change in sales technology
- P2. Participate in sales technology implementation projects
- P3. Engage with cross functional team members required to ensure sales technology adoption within your organization
- P4. Develop meeting and communication cadence with IT or other operations teams to ensure technology implementation issues are discussed and addressed proactively
- P5. Monitor technology implementation and support changing processes to ensure intended outcomes are realized for improved sales performance

### A competent sales leader must know:

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- K1. Project planning and millstones
- K2. Cross-functional team communication methods
- K3. Organization's policies and procedures



# PROFESSIONAL SALES CONDUCT

## 7.1 ACT WITH INTEGRITY

### **A competent sales leader must be able to:**

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- P1. Transparently balance customer and company needs
- P2. Develop an open and transparent sales team culture
- P3. Foster an environment where individuals are comfortable presenting their concerns
- P4. Act in the best interests of the company, the community and the environment
- P5. Interpret policies and procedures for the company
- P6. Comply with legislation and develop compliance best practices
- P7. Interpret new legislation and its impact on current processes and procedures
- P8. Exhibit fairness and transparency in all transactions and interactions, for example:
  - › represent capabilities and conditions accurately, without deception
  - › remain objective, e.g. set aside personal opinions and biases
- P9. Use ethical principles in decision making processes
- P10. Anticipate and address situations that may create ethical dilemmas
- P11. Participate in development of company code of ethics/conduct based on analysis of potential dilemmas within sales teams

### **A competent sales leader must know:**

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- K1. Code of ethics or professional conduct
- K2. Industry standards
- K3. Company brand standards
- K4. Organization's policies and procedures
- K5. Potential impact on business due to public perception of unethical behavior

## 7.2 DRIVE RESULTS

### **A competent sales leader must be able to:**

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- P1. Demonstrate ownership for client and organizational success
- P2. Hold teams and individuals accountable
- P3. Manage your time and attitudes
- P4. Establish principles and discipline to stay the course
- P5. Deploy influencing strategies to achieve business goals
- P6. Balance urgency and accuracy
- P7. Gain trust and respect for proactively driving results for assigned areas within the overall business
- P8. Determine the timeframe to meet deliverables and regularly meet commitments
- P9. Support team in meeting commitments in agreed upon timeframes

### **A competent sales leader must know:**

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- K1. Company expectations
- K2. Client's expectations
- K3. Methods and approaches to self-discipline
- K4. Approaches to stress management

## 7.3 WORK AS PART OF A TEAM (COLLABORATION)

### **A competent sales leader must be able to:**

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- P1. Evaluate effectiveness of collaboration
- P2. Manage upward communication, sharing of news throughout the company
- P3. Engage the right people (SME's – engineers, consultants)
- P4. Engage team members across the organization
- P5. Leverage diverse perspectives
- P6. Seek team members' ideas and opinions to implement in solution creation
- P7. Provide constructive feedback to team members

### **A competent sales leader must know:**

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- K1. Organization structures and charts
- K2. Cross-functional teams
- K3. Expertise of different business lined (eg. legal, engineering, marketing, finance)

## 7.4 ENGAGE IN CONTINUOUS LEARNING

### **A competent sales leader must be able to:**

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- P1. Manage your professional development
- P2. Assess your own management skills
- P3. Develop personal development plans aligned to new skill development priorities or organizational goals and objectives
- P4. Leverage tools, resources, and solicit feedback toward self-awareness
- P5. Share with others lessons learned about difficult or complex situations

### **A competent sales leader must know:**

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- K1. Skill Assessment Frameworks

## 7.5 DEVELOP PERSONAL BRAND

### **A competent sales leader must be able to:**

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- P1. Create a personal vision and mission statement
- P2. Participate as a thought leader within your own industry segment
- P3. Develop social media presence by developing and sharing content relevant to your organization, industry, or sales leadership
- P4. Develop and refine elevator pitch for your company
- P5. Refine personal brand to ensure alignment with own organization's brand

### **A competent sales leader must know:**

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- K1. Components of personal brand
- K2. Positive impact of being a thought leader

## ABOUT THE CPSA INSTITUTE:

The CPSA Institute enhances the value and credibility of the sales profession through standards, a code of ethics, and certification.

## ABOUT THE CPSA

### Your Partner in Sales Success

The Canadian Professional Sales Association (CPSA) is Canada's most trusted sales leader.

Our up-to-the-minute sales tools, training, and resources empower sales professionals from entry to executive to achieve and advance. Industry-leading certification programs recognize the best in the business and set the bar for excellence in sales at every career stage.

CPSA's 20,000+ members include industry leaders, executives, entrepreneurs, managers, sales representatives, and agents from coast to coast.

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