



SALES LEADERSHIP

COMPETENCY FRAMEWORK

ACKNOWLEDGMENTS

The CPSA Institute would like to acknowledge the following volunteer executive committee members in the development of the Sales Leadership Competency Profile.

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We would also like to thank the many sales experts who participated in our national focus group meetings.

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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 two 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 leader would process in order to perform certain aspects of their job are denoted as numbered statements that begin with a “**K**” for “**Knowledge**” in each sub-skill 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 AND FORECASTING

Sales planning involves analyzing one's clients¹, accounts, team members, organization, and industry to better understand strengths and weaknesses, anticipate challenges, establish realistic targets and sales forecasts, and develop solutions while supporting the larger organizational strategy. This includes open communication with the sales team and cross-functional team members (e.g. marketing) about the vision, values, goals, measures, and execution of the plan and its performance.

1.1 ENGAGE IN STRATEGIC PLANNING

A competent sales leader must be able to:

- P1. Communicate organization vision, values, goals 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 competitors and potential threats or opportunities
- P4. Analyze basic sales organization challenges
- P5. Leverage creative thinking processes to identify new solutions (e.g. looking at a problem from different perspectives)
- P6. Communicate strategic planning upward and throughout the organization to inform organizational planning
- P7. Demonstrate agility by adapting new information to implement required changes
- P8. Develop implementation and communication plan to educate team members about selling strategy
- P9. Ensure alignment of selling strategy to organization 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:

- K1. Corporate business plans
- K2. Client growth and retention versus new client acquisition
- K3. Strategic Analysis models (e.g. SWOT – Analysis of Strengths, Weaknesses, Opportunities, and Threats)
- K4. Value chain for each major client's industry

¹ Client is used throughout this document as a synonym for customer

1.2 PLAN ACCOUNTS, TERRITORIES, AND TARGETS

A competent sales leader must be able to:

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

A competent sales leader must know:

- K1. SMART Goals: Specific, Measurable, Assignable, Realistic, and Time-bound goal statements
- K2. Sales process models, stages, and definitions
- K3. Knowledge of conflict resolution principles

1.3 EXECUTE WITH EXCELLENCE

A competent sales leader must be able to:

- P1. Collaborate with sales team and cross-functional team members to set leading and lagging indicators for sales performance
- P2. Lead sales team in the development of target client list, priority market segments, regions and accounts
- P3. Identify sources for lead generation and work with marketing teams to align promotional activities
- P4. Delegate sales tasks to team members who possess the requisite experience and capabilities
- P5. Collaborate with marketing team members for planning go-to-market strategies
- P6. Identify potential bottlenecks to success and work to eliminate them
- P7. Establish ongoing communication and collaboration cadence with marketing to support sales success throughout execution of the plan
- P8. Communicate openly and transparently about how the sales organization is performing
- P9. Adapt plans based on problem areas identified during implementation

A competent sales leader must know:

- K1. Key performance indicators and business objectives
- K2. Foundational organizational structure, roles and responsibilities
- K3. Assembling and leading cross-functional teams
- K4. Leading and lagging performance indicators
- K5. Organizational strategy, strategic sales plans, implementation plans and tactics

BUILDING AND LEADING THE SALES TEAM

In order to build and maintain a strong sales team, sales leaders must source and retain competent team members. This requires determining current and future staffing needs and selecting candidates based on pre-established criteria. After hiring, sales leaders need to support new members' transition, communicate clear expectations, develop a reward system that recognizes team members' different motivators (e.g. compensation, recognition programs), and promote better performance.

2.1 ENGAGE IN STAFF PLANNING

A competent sales leader must be able to:

- P1. Recommend size and structure of sales force required to achieve goals (e.g. inbound, outbound, sales support, etc.)
- P2. Align salesforce planning to lifestyles 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. Foster cross-functional relationships by identifying opportunities for team selling
- P6. Develop plan for salesforce skill development based on identified learning areas within the sales team

A competent sales leader must know:

- K1. Salesforce job descriptions
- K2. Cultural differences within the workplace
- K3. Demographic differences within the workplace
- K4. Sales capacity concepts and models

2.2 RECRUIT AND SELECT SALES TEAM MEMBERS

A competent sales leader must be able to:

- P1. Develop job descriptions 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 with prospective hires
- P7. Adhere to regulatory requirements in employee recruitment, selection, and orientation

A competent sales leader must know:

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

2.3 ONBOARD SALES TEAM MEMBERS

A competent sales leader must be able to:

- 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 member is set-up for success in their role
- P3. Clarify performance standards and expectations for team members
- P4. Support transition of client files and transfer of knowledge between sales professionals
- P5. Ensure sales foundation training occurs
- P6. Incorporate client call feedback during first period of onboarding
- P7. Establish processes that ensure team members achieve proficiency in a defined period
- P8. Review and update onboarding processes to ensure the time required to achieve proficiency in role is reflective of unique industry, corporate, or product line requirements

A competent sales leader must know:

- K1. Organization onboarding needs and resources
- K2. Federal/Provincial requirements for recruitment, selection, and orientation

2.4 RECOGNIZE AND INCENT SALES PERFORMANCE

A competent sales leader must be able to:

- P1. Identify potential misalignment between sales team behaviour, incentive programs, and organization goals and objectives
- P2. Select performance metrics that will be used for monitoring performance, taking into consideration how these metrics will link to compensation and influence behaviours
- P3. Implement reward and recognition programs to derive the desired sales performance
- P4. Incorporate 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. Communicate behavioural and performance expectations to sales team (i.e. how they will be measured, observed, and recognized)

A competent sales leader must know:

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

COACHING FOR SALES SUCCESS

Supporting the team in both individual development and sales performance is important to building long term success as a sales leader. This includes assessing team members for areas of strengths and potential areas for improvement and for providing resources (e.g. training, sales tools, peer mentoring, coaching) for all stages of professional development and streamlining the sales cycle. Success involves providing team members with clear expectations and frequent feedback on their performance.

3.1 SUPPORT SALES ENABLEMENT

A competent sales leader must be able to:

- P1. Identify the cadence for individual skills development most appropriate for your sales team members
- P2. Implement sales tools and processes to accelerate sales performance
- P3. Identify business challenges that can be addressed through short- and long-term training versus process improvements
- P4. Engage team members through storytelling and experience sharing as part of team learning
- P5. Implement ongoing training and skill development solutions to ensure culture of continuous learning and improved sales performance
- P6. Establish ongoing communication with marketing team members to leverage tools and resources for sales enablement

A competent sales leader must know:

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

3.2 COACH TO THE SALES PROCESS

A competent sales leader must be able to:

- P1. Provide specific, behaviourally-based feedback on areas of strength and areas for improvement
- P2. Provide coaching on the sales process separately from coaching on professional skill development
- 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. Allocate coaching time to ensure individuals at all performance levels receive feedback
- P6. Assess individual team member capabilities at various stages of the sales process and 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 positive and negative outcomes

A competent sales leader must know:

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

3.3 COACH FOR SALES PERFORMANCE

A competent sales leader must be able to:

- P1. Identify individual team member needs through discussion, assessment, and 360 degree feedback
- 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 performance improvement
- 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. Identify opportunities for increased responsibility as part of development planning
- P9. Assess sales team member readiness for sales performance coaching
- P10. Determine best model for sales performance coaching based on individual team member needs
- P11. Ask specific, situational, and open-ended questions to guide development discussion
- P12. Share your own experiences and lessons learned with team members
- P13. Engage in personality assessments for yourself and the team
- P14. Engage human resources expertise in performance management and termination protocol when performance improvement planning is not successful

A competent sales leader must know:

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

SUPPORTING THE CYCLE OF SELLING

A goal of every sales leader is to support the sales cycle. This includes assessing clients and relevant factors to determine the most appropriate sale processes, metrics and communication style that best suits the client, product and any set objectives. As a leader, it is important to support your team in handling strategic client relationships or difficult client situations (e.g. determining key people, providing extra support for top clients, complex sales situations and negotiations).

4.1 ESTABLISH THE SALES PROCESS

A competent sales leader must be able to:

- P1. Assess client journey through the sales funnel
- P2. Develop and execute sales process to align with established goals, objectives and priorities
- P3. Use client needs to frame the sales cycle conversation with team members
- P4. Evaluate various sales models and implement the best fit for your organization
- P5. Adapt sales cycle, metrics, and key performance indicators 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 take accountability for the entire sales cycle and client journey

A competent sales leader must know:

- K1. Sales methodologies and models
- K2. Stages of the sales cycle, naming and definitions

4.2 SUPPORT STRATEGIC CLIENT RELATIONSHIPS

A competent sales leader must be able to:

- P1. Work with team members to ensure there are specific, measurable plans for the maintenance and growth of top clients
- P2. Participate in meetings with top clients or potential clients, as required, to support team members
- P3. Establish methodology for sales team members to document clients' organizational structure and decision-making authorities

A competent sales leader must know:

- 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 client experience for building loyalty

4.3 ENGAGE IN SALES COMMUNICATION

A competent sales leader must be able to:

- P1. Ask clarifying and open-ended questions
- P2. Repeat what you've heard to clarify understanding
- P3. Adapt communication to personality types
- P4. Deliver candid, open, and honest responses in all communication
- 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 that 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:

- 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. Appropriate communication method (e.g. email, webcast, conference call, etc.)
- K6. Theory of Emotional Intelligence

4.4 SUPPORT NEGOTIATIONS

A competent sales leader must be able to:

- P1. Support complex sales with multiple buyers and approval processes
- P2. Support sales teams through deal negotiation by helping to overcome potential challenges
- P3. Handle conflicts and differences to reach resolution throughout the sales process
- P4. Establish feedback loop to ensure client feedback informs continuous improvement for your entire sales team and organization
- P5. Anticipate and overcome potential objections:
 - › use past experience and previous objections to prepare for future objections

A competent sales leader must know:

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

BUSINESS ACUMEN

Competent sales leaders possess general business skills and promote industry standards. Understanding the basics of financial management, legal terms and a general knowledge of your own business are essential.

5.1 UNDERSTAND YOUR ORGANIZATION

A competent sales leader must be able to:

- 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:

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

5.2 UNDERSTAND YOUR CLIENT'S BUSINESS

A competent sales leader must be able to:

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

A competent sales leader must know:

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

5.3 DEMONSTRATE FINANCIAL LITERACY

A competent sales leader must be able to:

- P1. Develop and manage sales department budgets
- P2. Monitor expenses (actual vs. planned)
- P3. Develop and use sales reports for decision making
- 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 (fixed and variable), 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:

- 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:

- 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. Use templates and contracts
- P6. Involve legal expertise when required
- P7. Engage human resource management expertise to ensure compliance with employment law and legislation

A competent sales leader must know:

- K1. Federal, provincial, or territorial legislation as required for organizational context
- K2. How different cultures view contracts and legal system
- K3. Own organization's legal templates and documents
- K4. Terms and conditions
- K5. Payment terms
- K6. Purchase orders
- K7. Employment Standards Legislation

SALES TECHNOLOGY

The sales industry has access to many forms of technology that can be leveraged at various stages of the sales cycle. Assessing and integrating appropriate technology allows the sales team to optimize time and resources, make more informed and effective decisions, and promotes an identity that is willing to learn and implement new skills.

6.1 ALIGN SALES TECHNOLOGY TO STRATEGY

A competent sales leader must be able to:

- 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. Seek out opportunities to learn about new technology
- P5. Develop network of technological resources, for example:
 - › blogs or vlogs that are industry specific
- P6. Identify and prioritize recommendations for salesforce automation (roles or processes) to maximize time spent on high value activities

A competent sales leader must know:

- K1. Variety of sales related technology
 - › Artificial intelligence
 - › Prospect management software
 - › Client relationship software
 - › Presentation software
 - › Client intelligence software
 - › Software for sales process automation
- K2. Organization's security policies
- K3. Implications of technology on clients
- 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:

- P1. Identify where new technology can be leveraged to generate insights, for example:
 - › insights to understand organizational sales performance
 - › client insights
- P2. Synthesize data and findings to support the team by eliminating 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:

- 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:

- 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 to ensure sales technology adoption within your organization
- P4. Develop meeting and communication cadence with information technology department or other operations teams to ensure technology implementation issues are discussed and addressed proactively
- P5. Monitor technology implementation and support changing processes, as required, to ensure intended outcomes are realized for improved sales performance

A competent sales leader must know:

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

PROFESSIONAL SALES CONDUCT

Developing skills related to professional conduct in any industry is of the utmost importance. Serving as a model practitioner, who acts with and fosters integrity while working as part of team to achieve desired results, bodes well for the team's professional image and the image the organization represents. Similarly, having the motivation to continuously develop one's professional growth and personal brand on a regular basis ensures continued relevance in quickly evolving markets.

7.1 ACT WITH INTEGRITY

A competent sales leader must be able to:

- P1. Balance client and organization needs in a transparent manner
- 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 organization, the community and the environment
- P5. Interpret policies and procedures for the organization
- P6. Interpret new legislation and their impact on current processes and procedures
- P7. Comply with legislation and communicate legislative requirements with team members
- 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:

- 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 behaviour

7.2 DRIVE RESULTS

A competent sales leader must be able to:

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

A competent sales leader must know:

- K1. Company expectations
- K2. Client 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:

- P1. Evaluate effectiveness of collaboration
- P2. Manage upward communication, sharing of news throughout the organization
- P3. Engage the right people inside and outside the organization (team members, SMEs – engineers, consultants, etc.) to leverage diverse perspectives
- P4. Seek team members' ideas and opinions to implement in solution creation
- P5. Provide constructive feedback to team members

A competent sales leader must know:

- K1. Organizational structures and charts
- K2. Cross-functional teams
- K3. Expertise of different business functions (e.g. legal, engineering, marketing, finance etc.)

7.4 ENGAGE IN CONTINUOUS LEARNING

A competent sales leader must be able to:

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

A competent sales leader must know:

- K1. Skill Assessment Frameworks

7.5 DEVELOP PERSONAL BRAND

A competent sales leader must be able to:

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

A competent sales leader must know:

- 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.

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

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Canada's Sectoral Initiatives Program

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