



SALES PROFESSIONAL

COMPETENCY FRAMEWORK

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THE PROFESSIONAL SALES COMPETENCY FRAMEWORK

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 professional sales 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 professional at two distinct stages of career progression in sales roles.

These indicators are denoted as numbered statements that begin with a “**P**” for “**Performance**” and outline the body of skills pertinent to proficient practice at two different levels: sales associate and sales professional. The average time on the job required to demonstrate performance indicators for Sales Associate is 6 months. The average time on the job required to demonstrate performance indicators for Sales Professionals is 4 years.

The necessary knowledge that a competent sales professional 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 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.

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FRAMEWORK DIAGRAM



PROSPECTING

Description: Understanding one’s own company and its offerings, the client’s business challenges and the characteristics of the market in which it operates (e.g. strengths, weaknesses, competition, trends) ensures that sales professionals work efficiently and participate in client conversions productively. This requires skills related to gathering and synthesizing client market intelligence, aligning one’s own company’s strengths and weaknesses towards solution creation, as well as developing and implementing an action plan.

1.1 UNDERSTAND THE MARKET

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Conduct research on competition:</p> <ul style="list-style-type: none"> › Compare own products and services to competition to identify advantages and disadvantages <p>P2. Understand and speak to characteristics of own company:</p> <ul style="list-style-type: none"> › Highlight own products and services › List benefits and advantages of company’s products and services <p>P3. Speak to characteristics of the industry that are outlined on product or service documentation</p>	<p>P1. Utilize information gathered on competition towards describing unique value proposition and positioning within the market</p> <p>P2. Analyze impact of industry trends on products and services offering</p> <p>P3. Leverage characteristics of the industry to gain valuable information that can be implemented through the sales process</p>

A competent practitioner must know:

- K1. Industry etiquette
- K2. Own products and services
- K3. Marketplace characteristics
- K4. Competition’s characteristics and products/services
- K5. Target company/client characteristics and needs/issues
- K6. Organization influencers or main industry influencers
- K7. Trends and opportunities within industry
- K8. Research methods and skills
- K9. Industry associations, internships, committees/groups

1.2 CONDUCT SALES PLANNING

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Implement tactics from own company's annual sales plan or strategic plan, in preparation of personal sales plans:</p> <ul style="list-style-type: none"> › Develop and implement weekly/monthly plans › Identify sales communications and objectives <p>P2. Set short- and long-term objectives that:</p> <ul style="list-style-type: none"> › Reflect the organization's goals and objectives › Specific, measurable, and timely <p>P3. Integrate portions of territory business plan as assigned</p> <p>P4. Implement action plan</p> <ul style="list-style-type: none"> › Break down large tasks into manageable action steps › Set itemized schedule to complete tasks and activities › Prioritize tasks <p>P5. Seek assistance, support, and resources from supervisor when needed</p> <p>P6. Assess progress towards objectives:</p> <ul style="list-style-type: none"> › Share achievements, issues, and problems with stakeholders (i.e. immediate supervisor) › Carry out new tasks that have arisen based on determined responsibilities <p>P7. Make suggested recommendations as required, e.g. when timelines cannot be met</p> <p>P8. Make guided adjustments as required</p> <p>P9. Manage funnel by:</p> <ul style="list-style-type: none"> › adding new opportunities in the pipeline on a regular basis as soon as an opportunity is identified › keeping the funnel accurate, e.g. pipeline quality 	<p>P1. Develop portions of your company's strategic plan in preparation of personal sales plans, for example:</p> <ul style="list-style-type: none"> › Identify key account plans or territory plans as appropriate to personal sales objectives › Forecast sales targets <p>P2. Follow-through on short and long-term objectives that:</p> <ul style="list-style-type: none"> › Reflect the organization's goals and objectives › Are specific, measurable, achievable, realistic and timely (SMART) <p>P3. Prepare territory business plan to identify prospects, opportunities and gaps by:</p> <ul style="list-style-type: none"> › specific region › industry › market segment <p>P4. Develop action plans:</p> <ul style="list-style-type: none"> › Identify large tasks and action steps › Set overall schedule to complete tasks and activities <p>P5. Identify and recruit assistance and support from trusted resources as needed</p> <p>P6. Provide thorough assessment of progress towards objectives:</p> <ul style="list-style-type: none"> › Share achievements, issues, problems and solutions with stakeholders (i.e. immediate supervisor, subject matter experts, clients, cross-functional team members) › Identify new tasks that have arisen and outline responsibilities towards completing tasks <p>P7. Direct adjustments as required</p> <p>P8. Achieve consistently the key performance indicators (KPIs) determined by company</p> <p>P9. Maintain account management for existing clients</p> <p>P10. Recognize and manage specific funnel characteristics:</p> <ul style="list-style-type: none"> › Quality of funnel › Funnel between high and low margin product

A competent practitioner must know:

- K1. Sales process models, stages, definitions, e.g. sales funnel
- K2. Time management principles and tools, e.g. software, scheduler, marketing tools
- K3. SMART goals
- K4. How to manage majority of customer's minimum requirements
- K5. Customer growth and retention vs. new customer acquisition
- K6. Sales administration/operations reports
- K7. Corporate business plan and department objectives

1.3 DEVELOP CLIENT INTELLIGENCE

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Build prospect lists from existing identified sources, e.g. existing and past client lists, reports from lost business, referrals, trade publications, association and membership lists</p> <p>P2. Use scripted outreach practices to span wide range of prospective clients and to target well-aligned clients</p> <p>P3. Build network to leverage relationships, to create new connections and referral network</p> <p>P4. Conduct customer needs analysis for various sales opportunities related to specific products or services</p> <p>P5. Conduct research on potential clients, for example: <ul style="list-style-type: none"> › industry vertical › competitor › challenges › basic financial situation › people roles, responsibilities and influence, e.g. LinkedIn </p> <p>P6. Use list of qualification questions</p> <p>P7. Use company-provided tools and technology to obtain relevant insight</p> <p>P8. Identify the client interaction or compelling event that will allow to move to the next step with client</p> <p>P9. Initiate contact with the client using practices provided</p> <p>P10. Deliver pre-established elevator pitch that differentiates own organization from competition</p>	<p>P1. Develop list of sources for developing prospects and use information towards generating client intelligence</p> <p>P2. Develop target profile for potential clients: <ul style="list-style-type: none"> › Match needs of clients to services and offers available › Distribute profile to appropriate departments › Identify which prospects can afford products and services offered › Determine who decision makers are within prospect organizations. › Select targets </p> <p>P3. Build and manage network to leverage relationships and create new connections and referral network</p> <p>P4. Conduct SWOT analysis for various sales opportunities</p> <p>P5. Synthesize research reports to develop understanding of clients' requirements, for example: <ul style="list-style-type: none"> › advanced financial analysis › market research › analyst reports (internal and/or external) </p> <p>P6. Prepare list of qualification questions</p> <p>P7. Leverage advantages or limitations of tools and technology to provide relevant insight into clients, e.g. client relationship management (CRM) tools</p> <p>P8. Create list of potential compelling events for industry that will allow movement to next stages with client</p> <p>P9. Tailor technique or approach when initiating contact with client, to meet its needs</p> <p>P10. Deliver appropriate elevator pitch that differentiates own organization from competition</p>

A competent practitioner must know:

- K1. Service delivery modes and processes
- K2. Organization of corporate structure
- K3. Department objectives
- K4. Forecasting software for industry trends and propensity for buying
- K5. Potential client needs and solutions
- K6. Common marketplace needs and solutions

FOSTERING CLIENT RELATIONSHIPS

Description: A major component of the sales cycle involves creating lasting relationships with new or existing clients. The essence related to developing and maintaining those relationships is rooted in fundamental skills applicable to a number of industries. These include: establishing rapport, various forms of communication, and being able to conduct a meeting.

2.1 DEVELOP CLIENT RELATIONSHIPS

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Establish rapport by finding common ground</p> <p>P2. Create a positive first impression and establish credibility with client:</p> <ul style="list-style-type: none"> › identify client concerns › present methods for addressing concerns › establish dialogue with client to understand client company and business <p>P3. Create a positive first impression and establish credibility with client</p> <p>P4. Ask client of preferred method to communicate, e.g. email, phone</p> <p>P5. With guidance, leverage internal and external subject matter experts (SMEs) to ensure client needs are understood:</p> <ul style="list-style-type: none"> › Summarize what is known about client needs and prepare those who have been brought in to assist <p>P6. Validate assumptions about clients' budget and purchasing authority</p> <p>P7. Collect information related to client's decision-making process, organization structure and profile of all individuals involved in the purchasing decision</p> <p>P8. Maintain client/contact management files:</p> <ul style="list-style-type: none"> › Keep files organized 	<p>P1. Apply best-supported methods for establishing rapport with specific clients</p> <p>P2. Have perspective of different audience types and structure relationships accordingly</p> <p>P3. Adjust approach to accommodate variance in clients' characteristics, needs, goals and objectives</p> <p>P4. Recognize the impact of cultural, demographic, and generational differences to adapt approach and style</p> <p>P5. List methods to communicate with different clients at various stages of the sales cycle</p> <p>P6. Identify key internal and external subject matter experts (SMEs) to recruit to ensure client needs are best understood:</p> <ul style="list-style-type: none"> › whom to bring in › when to bring them in <p>P7. Validate assumptions about client's financial status and purchasing readiness</p> <p>P8. Leverage information related to client's decision-making process, organization structure and profile of all individuals involved in the purchasing decision</p>

- P9. Track client information, next steps and follow up notes
- P10. Stay engaged, be mindful of milestones, next steps
- P11. Conduct scheduled client interaction
- P12. Conduct a follow-up communication schedule
- P13. React to client inquiries and prioritize follow-up to build relationships

- P9. Establish client/contact file management best practices
- P10. Establish a follow-up communication schedule
- P11. Strategically follow-up with clients to build relationships
- P12. Maintain relationships with key decision makers and influencers
- P13. Develop discovery phase questions to be used in understanding client needs

A competent practitioner must know:

- K1. Client relationship management system/database
- K2. Client's social style, e.g. analytical, driver, expressive, amiable
- K3. Cultural differences
- K4. Emotional intelligence
- K5. Importance of customer experience to build loyalty
- K6. Sales call planning tools and templates.
- K7. Sales call techniques

2.2 PRACTICE ACTIVE LISTENING

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Display interest in conversation, e.g. make eye contact, nod or smile</p> <p>P2. Remove or reduce communication barriers: › Refrain from pre-judging the client's message</p> <p>P3. Listen without interrupting speaker</p> <p>P4. Monitor client's non-verbal cues, including queues gathered in telephone conversations</p> <p>P5. Ask several key questions to confirm message</p> <p>P6. Document key details of the conversation to maintain record of client information, needs and expectation</p>	<p>P1. Anticipate intent behind client non-verbal cues and implement appropriate responses</p> <p>P2. Confirm understanding of the message: › provide a summary of speaker's message</p> <p>P3. Synthesize key details of the conversation towards solution creation</p>

A competent practitioner must know:

-
- K1. Communication barriers, e.g. second language difficulties, noisy environment
 - K2. Using open-ended questions to facilitate telephone communication
 - K3. Verbal and non-verbal communication techniques
 - K4. Diversity of individuals, e.g. characteristics, values, beliefs, behaviours, experiences
 - K5. Client's social style, e.g. analytical, driving, expressive, amiable
 - K6. Variance in communication methods and their nuances:
 - › How to recognize cues via telephone call or webinar

2.3 COMMUNICATE VERBALLY

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Identify purpose of communication</p> <p>P2. Organize ideas in a logical sequence</p> <p>P3. Use basic question techniques to understand client's needs, goals and objectives, both professional and personal</p> <p>P4. Speak clearly: <ul style="list-style-type: none"> › use correct grammar and pronunciation › avoid excessive filler words, e.g. um, uh, you know, okay </p> <p>P5. Speak to client concerns and questions utilizing guided techniques and templates</p> <p>P6. Refrain from lecturing or using condescending tones</p> <p>P7. Avoid controversial or inappropriate issues</p> <p>P8. Adjust tone, inflection, volume and speed according to intent of message, e.g. follow a script</p> <p>P9. Use precise, easy-to-follow language, e.g. avoid use of industry jargon</p> <p>P10. Use non-verbal communication to reinforce verbal message, e.g. pauses, eye contact.</p> <p>P11. Use communication tools throughout the various stages of the sales cycle</p>	<p>P1. Organize ideas in terms of: <ul style="list-style-type: none"> › prioritizing statements › emphasizing key messages </p> <p>P2. Outline and use supported question techniques to understand client's needs, goals and objectives, both professional and personal</p> <p>P3. Outline and utilize professional and public speaking best practices</p> <p>P4. Anticipate client concerns and questions and proactively address them with the client</p> <p>P5. Adapt language and level of formality to meet needs of audience</p> <p>P6. Use non-verbal communication to reinforce verbal message, e.g. pauses, eye contact</p> <p>P7. Construct effective communication plans with built-in methods for follow-up at key points in the sales cycle</p> <p>P8. Select appropriate communication method based on desired intent and client needs</p>

A competent practitioner must know:

- K1. Communication barriers, e.g. second language difficulties, noisy environment
- K2. Verbal and non-verbal communication techniques
- K3. Client's social style, e.g. analytical, driving vs. driver, expressive, amiable
- K4. Communication tools available, e.g. email, webcast, conference call
- K5. Question techniques and how to use them to extract client needs and build opportunities
- K6. Telephone, voicemail and web conference communication techniques
- K7. Effective tone and style
- K8. Phone etiquette
- K9. Psychology of client
- K10. Emotional intelligence
- K11. Principles and methods of conflict resolution
- K12. Tools and approaches on adjusting style based on characteristics

2.4 COMMUNICATE IN WRITING

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Determine type of information that reader requires, e.g. proposal, letter</p> <p>P2. Use format and medium suited to purpose and content, e.g. report, presentation, proposal</p> <p>P3. Arrange ideas logically</p> <p>P4. Adapt to language and level of formality appropriate to audience</p> <p>P5. Provide information that is accurate, concise and complete</p> <p>P6. Use correct grammar, punctuation and spelling</p> <p>P7. Proofread to make appropriate corrections</p> <p>P8. Ensure document is clean and legible</p> <p>P9. Have a colleague or supervisor review formal written communication, e.g. proposal, report</p> <p>P10. Follow up to ensure the message is received and understood</p>	

A competent practitioner must know:

- K1. Written communication format requirements, e.g. letter, proposal
- K2. Elements of proposal, e.g. structure, pricing, discount
- K3. Elements of presentations, report writing
- K4. Types of tenders and response requirements

2.5 CONDUCT MEETINGS

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
P1. Set agenda using provided templates	P1. Set agenda
P2. Confirm the agenda, e.g. purpose, process, payoff	P2. Monitor to ensure agenda items are being met during meeting
P3. Organize details of meeting, e.g. participants, location, communication tools required	P3. Adjust approach for building rapport by reading audience
P4. Follow technique to build rapport	P4. Lead conversation: <ul style="list-style-type: none"> › add key details into conversation to keep on topic
P5. Focus conversation on solution to business problem	P5. Encourage input from all participants
P6. Keep conversation on topic	P6. Focus conversation on solutions to business problem
P7. Adhere to timelines	P7. Adhere to timelines
P8. Recap discussions and agree to next steps using techniques provided	P8. Recap discussions and agree to next steps using techniques provided
P9. Record minutes and details of actions to be taken	P9. Record minutes and details of actions to be taken
P10. Follow-up, e.g. send email within 24 hours	P10. Follow up, e.g. send email within 24 hours
P11. Evaluate effectiveness of meeting	P11. Evaluate effectiveness of meeting

A competent practitioner must know:

- K1. Meeting procedures
- K2. Communication techniques and tools available, e.g. white-boarding
- K3. How to access key information and data while in meeting
- K4. Contingency planning for presentations

DEVELOPING CLIENT-FOCUSED SOLUTIONS

Description: The aim of every sales professional in the field rests in providing solutions that meet the needs and expectations of their clients. This requires a thorough understanding of client challenges and goals before presenting your organizations products or services. Being adaptable, understanding trends, handling objections and thinking on the spot are a few examples of the skills pertinent to delivering of client-focused solutions.

3.1 DEVELOP SOLUTIONS

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
P1. Report on data collected in discovery phase	P1. Analyze data collected in discovery phase and provide recommendations
P2. Consult with colleagues or partners who could assist with solutions	P2. Recommend colleagues or partners that could assist with solution
P3. Develop a solution with client in mind, e.g. specific requests or constraints, budget requirements, alignment with goals and objectives	P3. Identify potential solutions to meet client needs
P4. Validate client agreement with proposed solution concepts	P4. Consider innovative sales methods and approaches
P5. Implement potential solutions to meet client needs: <ul style="list-style-type: none"> › resolve issues › focus on interests and goals 	P5. Weigh the advantages and disadvantages of each option
P6. Apply selected, appropriate problem-solving skills to find a solution	P6. Persevere in difficult situations: <ul style="list-style-type: none"> › Remain goal-oriented and focused
P7. Manage client expectations while being realistic	P7. Collaborate with clients to provide best solution that meets their needs
	P8. Clearly define business case in financial terms: <ul style="list-style-type: none"> › Provide scope of return on investments (ROI) to client, cost of investment (COI)
	P9. Overcome client’s resistance or hesitation to be able to offer solution
	P10. Apply appropriate problem-solving skills
	P11. Communicate in a client-focused manner with clients, service providers and partners

- P12. Anticipate and meet client expectations proactively, beyond stated needs
- P13. Apply diverse strategies to inform client decisions and shape client relationships
- P14. Demonstrate innovation towards solution development
- P15. Adjust client solution requirements as needed, for example:
 - › offer opportunity for amendments or changes to proposed solution
 - › remain flexible in approach in unknown circumstances to monitor and ensure alignment throughout entire process
 - › collaborate with client towards designed solution
- P16. Evaluate effectiveness of solution selected, e.g. seek feedback from client
- P17. Advocate for the client within the organization
- P18. Provide options towards maintaining the relationship

A competent practitioner must know:

- K1. Sales techniques, e.g. client-focused selling, consultative selling, milestone centric planning
- K2. Sales tools available, e.g. collateral material, presentation portfolio, displays, audiovisual aids, advertising material
- K3. Sale approaches, e.g. sales calls, presentations
- K4. Quotation preparation, e.g. own company's quoting process
- K5. Trends in the marketplace in relation to own organization's position
- K6. Value assessment methods
- K7. Tracking processes

3.2 CONDUCT SALES PRESENTATIONS

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Prepare a tailored presentation for the client:</p> <ul style="list-style-type: none"> › Maintain relevance during presentation, stay on topic › Anticipate client questions <p>P2. Present information about product and service being offered, aligning them with client's needs, following a standardized format or template:</p> <ul style="list-style-type: none"> › use presentation aids, e.g. audio, visual, print › prepare support materials, e.g. brochure, pamphlets, registration forms › interact with audience › manage time <p>P3. Anticipate and overcome potential objections:</p> <ul style="list-style-type: none"> › provide responses relevant to client concerns › provide client with explanation or offer alternative solution › maintain positive attitude › consider personality type of client <p>P4. Provide limited information on specific data and numbers</p> <p>P5. Apply the same level of focus and attention towards all participants during the presentation</p> <p>P6. Deliver presentations online when required</p>	<p>P1. Prepare a tailored presentation for the client:</p> <ul style="list-style-type: none"> › maintain relevance during presentation › stay on topic › anticipate and address client questions and concerns <p>P2. Quantify benefits of products and services being offered, aligning them with client's needs</p> <p>P3. Anticipate and overcome potential objections:</p> <ul style="list-style-type: none"> › use previous objections to prepare for future objections › allow time for possibility of client overcoming objections themselves › consider personality type of client and nature of objections <p>P4. Speak about data and numbers:</p> <ul style="list-style-type: none"> › interpret information › answer client questions <p>P5. Apply the same level of focus and attention towards all participants during the presentation</p>

A competent practitioner must know:

- K1. Communication barriers, e.g. second language difficulties, noisy environment
- K2. Verbal and non-verbal communication techniques
- K3. Client's personality type or social style, e.g. analytical, driver, expressive, amiable
- K4. Technology available for presentation
- K5. Presentation styles
- K6. Alternative outcomes
- K7. Common objections, e.g. no need for products or services, products and services including features do not match client needs, previous discontentment, price, mode of payment unsatisfactory, clients already content
- K8. Benefits of client objections, e.g. provides opportunity to: give clients further information, clarify misconceptions, overcome objections, gain insight into products and minor services, Terms of negotiated service agreement

NEGOTIATING AND CLOSING

Description: To consolidate a sale, the ability to work with unforeseen changes and situations is mandatory. When a sale becomes stalled in negotiations, it is a signal that skills in earlier stages of the sales cycle were not exercised. Understanding various facets of financial and legal matters, and terms of sale helps sales professionals navigate this critical component of the sales cycle.

4.1 CLOSE THE SALE

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
P1. Identify basic buying signals: <ul style="list-style-type: none"> › positive body language › verbal confirmation P2. Seek client’s commitment P3. Reinforce value P4. Ask client for its business P5. Follow closing techniques to finalize the sale: <ul style="list-style-type: none"> › review selling points P6. Conduct review processes for unsuccessful sales P7. Demonstrate empathy, diplomacy, and respect P8. Create environment to facilitate open dialogue	P1. Maintain client commitment through entire process P2. Reinforce unique value proposition and return on Investment for the client. P3. Consider alternate outcomes and employ strategies to correct differences P4. Select best approach to ensure closing of sale P5. Strategically engage support team members, e.g. finance, legal P6. Conduct process and identify areas to improve in future opportunities P7. Clarify objections to understand root cause

A competent practitioner must know:

- K1. Closing techniques e.g. assume close, close on minor point, overcome objection as barrier to sale, offer incentive to close, use last-chance, ask for business directly
- K2. Difference between closing with sale vs. securing next steps in the sales process.
- K3. Objection handling or resolution processes

4.2 NEGOTIATE TERMS OF SALE

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Follow established timelines</p> <p>P2. Recognize responsibilities and own limits of authority during negotiations: › coordinate involvement of supervisor or authorized person to lead negotiations</p> <p>P3. Finalize pre-approved pricing</p> <p>P4. Obtain client's approval for final product or service</p>	<p>P1. Develop timeline</p> <p>P2. Establish roles and responsibilities related to negotiation plan</p> <p>P3. Agree on sales terms</p> <p>P4. Consider alternative outcomes and use positive strategies to correct outcomes.</p> <p>P5. Engage support team members when appropriate</p> <p>P6. Achieve consensus versus settling</p>

A competent practitioner must know:

- K1. Negotiation techniques
- K2. Negotiation principles
- K3. Common negotiation gambits
- K4. Influencing tactics
- K5. Concession strategies
- K6. Contract terms and conditions
- K7. Terms of sales/purchase agreement
- K8. Contingency planning if negotiations are not successful
- K9. Risk management principles

4.3 IDENTIFY THIRD PARTY RELATIONSHIPS

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Outline benefits of third-party relationship in support of various stages of the sales cycle:</p> <ul style="list-style-type: none">› Lead generation› References› Subject Matter Expertise	<p>P1. Identify opportunities for strategic relationships:</p> <ul style="list-style-type: none">› Analyze internal organizational gaps <p>P2. Identify potential partners using selection criteria, e.g ability to meet needs, compatibility</p> <p>P3. Research potential partner's background, e.g creditworthiness, financial situation, reputation in marketplace, ethical standards, conflict of interest</p> <p>P4. Collaborate to define working relationship and formal agreement</p> <p>P5. Monitor compliance with contract terms and conditions</p> <p>P6. Cultivate ongoing relationship, for example:</p> <ul style="list-style-type: none">› Maintain ongoing dialogue› Conduct periodic reviews› Assess satisfaction with alliance/agreement› Seek guidance to propose new solutions

A competent practitioner must know:

K1. Joint venture agreement concepts

FOLLOWING UP

Description: Following-up is a component of the sales cycle wherein client expectations, project milestones and timelines are referenced for completion and satisfaction, and the client relationship is strengthened toward future expansion of services and offerings that may be sold to the client. Competent sales professionals focus their efforts in this competency towards offering assurance to clients that key aspects of the agreed-upon sale are being achieved. Similarly, being adaptable and flexible towards the likelihood of changes and unforeseen circumstances is encouraged.

5.1 FOLLOW-UP ON THE SALE

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Confirm and follow up on sale using designated process:</p> <ul style="list-style-type: none"> › verify contracts are signed and returned › verify documents and payments are received › confirm details are accurate › make sure production and delivery schedules are met › fill in credit applications for clients › check with clients to confirm that expectations are being/have been met › review follow-up communication schedule/timeline <p>P2. Follow up during and after product or service delivery:</p> <ul style="list-style-type: none"> › Schedule next contact point (s) with clients if required › Contact clients (thank for business, confirm needs met, request additional business or contacts, ask for referral) › Prepare post-sales report › Update client file › Refer further leads 	<p>P1. Establish and implement systems for ensuring timely and efficient follow-up</p> <p>P2. Analyze feedback collected and identify action items for future improvement</p> <p>P3. Seek to understand additional needs or challenges the client may face, and offer additional solutions to clients, highlighting advantages of other available products and services</p>

- P3. Collect feedback
- P4. Offer additional products and services that can be of value to the client

A competent practitioner must know:

- K1. Scheduling tools, e.g. CRM, electronic agenda reminder, planning tools
- K2. Follow-up etiquette
- K3. Company suite of products and services

BUSINESS ACUMEN

Description: Competent sales professionals should possess general business skills to be effective in certain stages of the sales cycle. Understanding the basics of financial and legal terms as well as having general knowledge of your own business, in terms of products and services offered, allows professionals to remain nimble in many sales-related industries.

6.1 UNDERSTAND YOUR COMPANY

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Demonstrate understanding of own organization’s core values, mission, vision, goals, and objectives</p> <p>P2. Demonstrate knowledge of own organization’s products and services</p>	<p>P1. Leverage own organization’s core values, goals and objectives in the creation of solutions for clients, for example:</p> <ul style="list-style-type: none"> › Understand the competitive position of your own organization › Understand unique value proposition <p>P2. Capitalize on features, advantages and benefits of products and services in solution creation, for example:</p> <ul style="list-style-type: none"> › build on strengths and minimize weaknesses by demonstrating how to circumvent them › identify potential adaptations, using creativity, to meet particular client’s needs

A competent practitioner must know:

- K1. Organization structures
- K2. Cross-functional teams
- K3. Business basics
- K4. Competition offerings
- K5. Value proposition

6.2 DEMONSTRATE FINANCIAL LITERACY

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Understand the relevance of financial statements as they relate to developing client intelligence</p> <p>P2. Demonstrate understanding of basic financial formulas, including revenue, costs, pricing discounts, profits and losses, return on investment, and return on time invested:</p> <ul style="list-style-type: none"> › define formula elements › make calculations using basic formulas 	<p>P1. Recognize all aspects of the costs related to a sale, e.g. cost of goods sold, wages (variable compensation), your own expenses, third-party expenses</p> <p>P2. Understand the financial health of a client's business prior to pursuing potential sales opportunities</p> <p>P3. Calculate costs in foreign currency using currency conversion calculators</p> <p>P4. Forecast deal profitability with complex variables, e.g. rebate, investment vs return</p> <p>P5. Analyze relevance of financial statements:</p> <ul style="list-style-type: none"> › seek assistance from finance department to assess client potential <p>P6. Manage financial considerations for strategic accounts</p> <p>P7. Forecast client's business multiple years out</p> <p>P8. Recognize total and lifetime value of a client</p> <p>P9. Translate capital expenditure to operational expenditures</p> <p>P10. Remain current on the financial trends influencing own industry and client's industry</p> <p>P11. Calculate profit margin of different product lines</p> <p>P12. Create profit and loss statements for own accounts</p>

A competent practitioner must know:

- K1. Cost of goods and services
- K2. Reasons for costs increase, e.g. inflation
- K3. Contribution margin
- K4. Revenue
- K5. Profitability
- K6. Discounting

6.3 DEMONSTRATE LEGAL LITERACY

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
P1. Recognize details of signature authorities	P1. Demonstrate high-level understanding of sales-related terms and conditions
P2. Understand delegation of legal responsibilities, e.g. legal department, procurement team	P2. Involve legal expertise when required
P3. Escalate legal matters to immediate supervisor when required	P3. Understand regulations across various jurisdictions, e.g. provinces, states, countries
	P4. Know where to access information within own company

A competent practitioner must know:

- K1. Own company's legal templates and documents
- K2. Process for electronic signature and documentation
- K3. Terms and conditions
- K4. Legal contracts
- K5. Payment terms
- K6. Return authorization
- K7. Purchase orders
- K8. Insurance and liability

SALES PROCESS TECHNOLOGY

Description: The sales industry contains many forms of technology which can be leveraged at various stages of the sales cycle. Being familiar with available and appropriate technologies allows professionals to remain current with trends shaping the industry, engage in the sales process more efficiently, and promotes an identity that is willing to learn and implement new skills.

7.1 LEVERAGE SALES TECHNOLOGY

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
P1. Follow corporate standards and operating procedures	P1. Contribute to corporate standards and operating procedures
P2. Demonstrate an understanding of how technology works within the sales process	P2. Leverage appropriate technology benefits to drive sales and increase productivity
P3. Act upon appropriate technology to drive sales and increase productivity	P3. Demonstrate advanced business systems knowledge, e.g. Google Docs, Excel, Word, Dropbox, MS Project, Outlook
P4. Demonstrate basic business system knowledge, e.g. Google Docs, Excel, Word, Drop box, MS Project, Outlook	
P5. Track and share information accordingly	

A competent practitioner must know:

- K1. Applicable types of sales-related technology:
 - › Follow up software
 - › Prospect management software
 - › Customer Relationship Management (CRM) software
 - › Method for searching out and landing prospective clients
 - › Cloud based client management software
 - › Lead generation
 - › Presentation software
 - › Onboarding system
- K2. Organization's security policies
- K3. Implications of technology on customers

7.2 IMPLEMENT SOCIAL SELLING

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Apply appropriate format of social media for industry</p> <p>P2. Use selected social media platforms for various phases of sales strategy:</p> <ul style="list-style-type: none"> › Prospecting › Presentation › Relationship building › Providing value <p>P3. Hold conversations through social media and sharing of information:</p> <ul style="list-style-type: none"> › Establish regular communication schedule, frequency of blogging/posting <p>P4. Promote company profile</p> <p>P5. Use created and adjusted content to match sales process</p> <p>P6. Promote company product and services</p> <p>P7. Collect data analytics of social selling to understand trends</p> <p>P8. Recognize impact of all personal social media activity on the company</p>	<p>P1. Analyze and develop list of social media platforms best-suited for various phases of sales strategy based on specific company or industry context</p> <p>P2. Routinely hold conversations through social media and sharing of information</p> <p>P3. Leverage and promote company profile</p> <p>P4. Create and adapt content to match sales process</p> <p>P5. Analyze data analytics of social selling to understand trends</p> <p>P6. Analyze implications of all personal social media activity on the company</p>

A competent practitioner must know:

- K1. Hardware and Software for social selling
- K2. Social selling best practices:
 - › Listen actively
 - › Develop meaningful relationships
 - › Provide value

PROFESSIONAL SALES CONDUCT

Description: Developing skills related to professional conduct in any industry is of the utmost importance. Serving as a model practitioner, who acts with integrity, bodes well in terms of one’s professional image and the image of the company one represents. Similarly, having the ability to adapt and shape one’s personal brand and selling style on a regular basis ensures continued relevance in quickly evolving markets.

8.1 ACT WITH INTEGRITY

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
P1. Act in the best interest of the company, the community and the environment	P1. Act in the best interests of the company, the community and the environment
P2. Adhere to organization’s policies and procedures	P2. Interpret policies and procedures for the company
P3. Comply with legislation	P3. Comply with legislation and develop compliance best practices
P4. Take responsibility for actions and decisions	P4. Interpret new legislation and its impact on current processes and procedures
P5. Exhibit fairness and transparency in all transactions and interactions, for example: <ul style="list-style-type: none"> › Represent capabilities and conditions accurately without deception › Remain objective, e.g. set aside personal opinions and biases 	P5. Take responsibility for actions and decisions
P6. Use ethical principles in decision making processes	P6. Exhibit fairness and transparency in all transactions and interactions, for example: <ul style="list-style-type: none"> › represent capabilities and conditions accurately, without deception › remain objective, e.g. set aside personal opinions and biases
P7. Identify situations that may create ethical dilemmas	P7. Use ethical principles in decision making processes
P8. Respond to ethical dilemmas according to code of ethics/conduct: <ul style="list-style-type: none"> › consult with others, if appropriate, e.g. other team members, supervisor, legal professional › choose most prudent course of action, e.g. decide not to pursue business relationship with other party, flag questionable actions explain decision to other party 	P8. Anticipate and address situations that may create ethical dilemmas
	P9. Utilize company code of ethics/conduct based on analysis of potential dilemmas

A competent practitioner must know:

- K1. Code of Ethics / professional conduct
- K2. Ethical behaviours
- K3. Brand and industry ethical standards
- K4. Organization's policies and procedures
- K5. Federal and provincial/territorial legislation as required for organization context
- K6. How different cultures view contracts and legal system
- K7. Potential impact on business due to public perception of unethical behaviour
- K8. Positive impact of being a thought leader and consultative seller

8.2 DRIVE RESULTS

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Use proactive approaches to perform tasks without guidance and communicate status updates</p> <p>P2. Build trust and respect through interactions with others</p> <p>P3. Identify areas for improved services and efficiencies</p> <p>P4. Align actions with own company's and client's mission and strategic objectives</p> <p>P5. Meet commitments in designated timeframe and in accordance with expected deliverables: <ul style="list-style-type: none"> › meet target metrics </p> <p>P6. Accept constructive feedback and adjust behaviour</p> <p>P7. Exhibit tenacity</p>	<p>P1. Gain trust and respect for proactively driving results for assigned areas within the overall business</p> <p>P2. Establish plan to improve services and create efficiencies</p> <p>P3. Determine the timeframe to meet deliverables and regularly meet commitments</p> <p>P4. Establish a professional network by developing and maintaining ongoing relationships with peers and suppliers to meet client's needs</p> <p>P5. Demonstrate confidence</p> <p>P6. Meet commitments in designated timeframe and in accordance with expected deliverables: <ul style="list-style-type: none"> › meet target metrics </p> <p>P7. Accept constructive feedback and adjust behaviour</p>

A competent practitioner must know:

- K1. Code of ethics / professional conduct
- K2. Importance of a professional image
- K3. Company expectations
- K4. Importance of modeling behaviour
- K5. Client's expectations
- K6. Methods and approaches to self-discipline
- K7. Approaches to stress management
- K8. Processes for knowledge management

8.3 WORK AS PART OF A TEAM

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<ul style="list-style-type: none"> P1. Understand the org chart and who has decision-making power P2. Understand key organizational influencers P3. Respect team members' ideas and opinions P4. Establish trust with clients and colleagues P5. Communicate regularly with team members, e.g. share information and opportunities P6. Manage conflicts with co-workers in positive manner P7. Assist team members when possible P8. Recognize and support achievement of team sales objectives/goals 	<ul style="list-style-type: none"> P1. Leverage roles in organizational chart, as necessary P2. Establish roles and responsibilities of key company influencers P3. Seek team members' ideas and opinions to implement in solution creation P4. Establish trust in relationships and promote within team P5. Communicate regularly with team members, e.g. share information and opportunities P6. Recognize contributions of all staff P7. Regularly provide assistance to team members P8. Provide constructive feedback to team members P9. Manage upward communication, sharing of news throughout the company P10. Recognize and support achievement of team sales objectives/goals

A competent practitioner must know:

- K1. Organization structures
- K2. Cross-functional teams

8.4 ENGAGE IN CONTINUOUS LEARNING

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<p>P1. Determine short- and long-term professional goals</p> <p>P2. Pursue formal and informal options to advance professional development goals, for example:</p> <ul style="list-style-type: none"> › attend courses, workshops and seminars › complete postsecondary program, e.g. certificate, degree › identify a mentor or coach › become a mentor › personal research › volunteer for special projects › volunteer to take on additional responsibilities, e.g. mentoring, orienting new recruits <p>P3. Practice client-based role-plays and sales simulations</p> <p>P4. Participate in industry and community events and activities, for example:</p> <ul style="list-style-type: none"> › join industry associations › attend trade shows, professional working groups, networking › attend chamber of commerce functions › serve on committees or boards › attend or sponsor events and charitable causes <p>P5. Apply new learning to the job, for example:</p> <ul style="list-style-type: none"> › approaches › technology and software › templates and forms <p>P6. Share new information and experience with colleagues</p>	<p>P1. Analyze and adapt short and long term professional goals to create a professional development plan with actionable steps and timelines.</p> <p>P2. Identify skills and knowledge gaps, for example:</p> <ul style="list-style-type: none"> › legislation and regulation changes and updates › trends and issues › new approaches and technologies <p>P3. Design client-based role-plays and sales simulations</p> <p>P4. Map-out applicable industry and community events</p> <p>P5. Analyze and apply advantages and benefits of new learning to the job</p> <p>P6. Share with others lessons learned about difficult or complex situations</p> <p>P7. Establish best practices to share with colleagues, including:</p> <ul style="list-style-type: none"> › leverage learning points from past experiences, including success and failures

8.5 DEVELOP PERSONAL BRAND

A competent practitioner must be able to:

CERTIFIED SALES ASSOCIATE	CERTIFIED SALES PROFESSIONAL
<ul style="list-style-type: none">P1. Identify own strengths and weaknesses and how they impact the sales processP2. Identify influence of various selling stylesP3. Apply provided template for elevator pitchP4. Ensure personal brand aligns with own organization's values and culture	<ul style="list-style-type: none">P1. Establish link between own personality traits and characteristics and how they influence othersP2. Recognize influence of various selling styles and adapt with own characteristics to create selling styleP3. Develop and refine elevator pitchP4. Refine personal brand to ensure alignment with own organization's

A competent practitioner must know:

- K1. Components of personal brand

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

ABOUT THE CPSA

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