CPSA INSTITUTE

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 sale 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 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.

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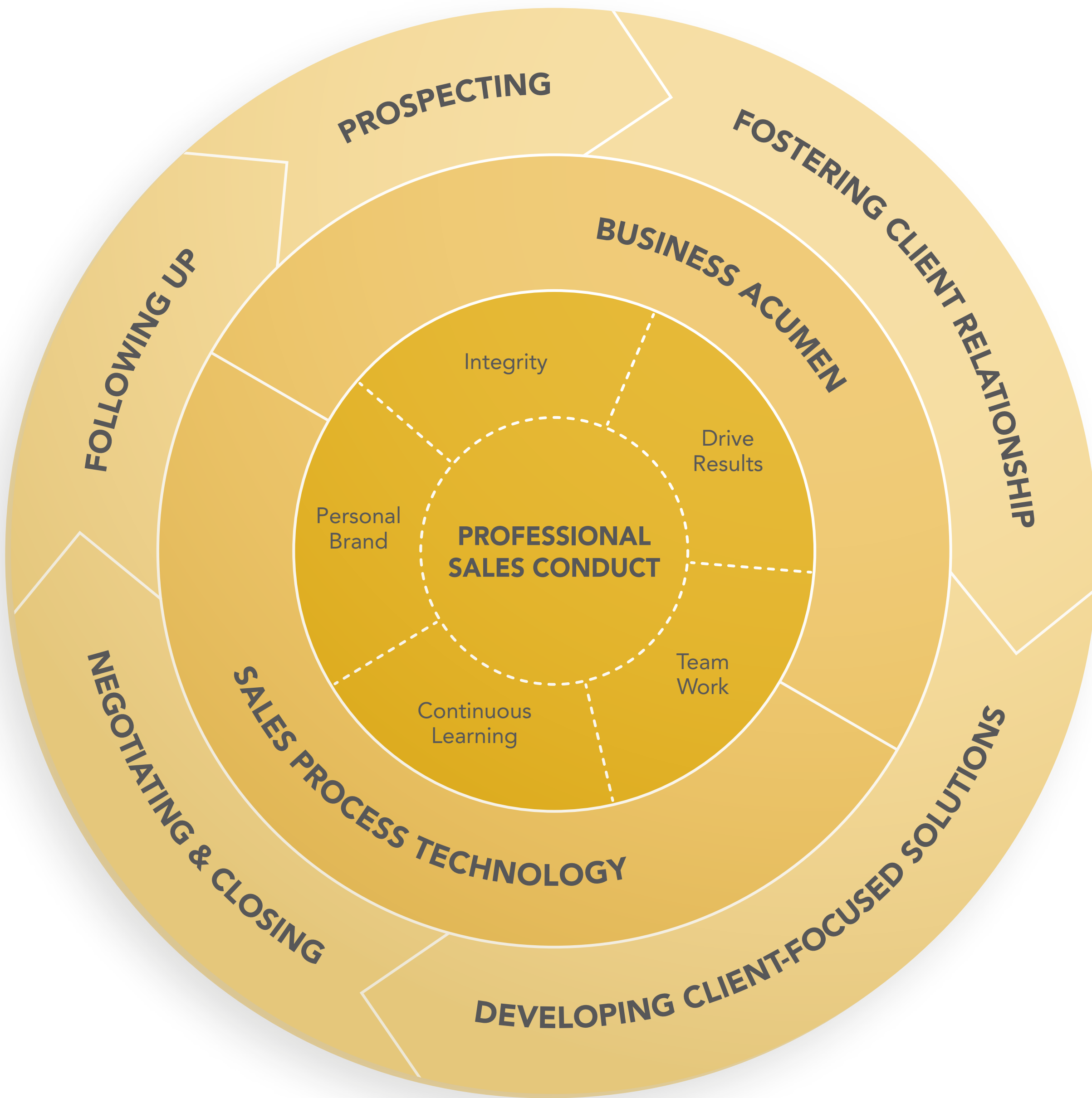
FRAMEWORK DIAGRAM



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
P1. Conduct research on competition: › Compare own products and services to competition to identify advantages and disadvantages P2. Understand and speak to characteristics of own company: › Highlight own products and services › List benefits and advantages of company's products and services P3. Speak to characteristics of the industry that are outlined on product or service documentation	P1. Utilize information gathered on competition towards describing unique value proposition and positioning within the market P2. Analyze impact of industry trends on products and services offering P3. Leverage characteristics of the industry to gain valuable information that can be implemented through the sales process

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
P1. Implement tactics from own company's annual sales plan or strategic plan, in preparation of personal sales plans: › Develop and implement weekly/monthly plans › Identify sales communications and objectives	P1. Develop portions of your company's strategic plan in preparation of personal sales plans, for example: › Identify key account plans or territory plans as appropriate to personal sales objectives › Forecast sales targets
P2. Set short- and long-term objectives that: › Reflect the organization's goals and objectives › Specific, measurable, and timely	P2. Follow-through on short and long-term objectives that: › Reflect the organization's goals and objectives › Are specific, measurable, achievable, relevant and timely (SMART)
P3. Integrate portions of territory business plan as assigned	P3. Prepare territory business plan to identify prospects, opportunities and gaps by: › specific region › industry › market segment
P4. Implement action plan › Break down large tasks into manageable action steps › Set itemized schedule to complete tasks and activities › Prioritize tasks	P4. Develop action plans: › Identify large tasks and action steps › Set overall schedule to complete tasks and activities
P5. Seek assistance, support, and resources from supervisor when needed	P5. Identify and recruit assistance and support from trusted resources as needed
P6. Assess progress towards objectives: › Share achievements, issues, and problems with stakeholders (i.e. immediate supervisor) › Carry out new tasks that have arisen based on determined responsibilities	P6. Provide thorough assessment of progress towards objectives: › 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
P7. Make suggested recommendations as required, e.g. when timelines cannot be met	P7. Direct adjustments as required
P8. Make guided adjustments as required	P8. Achieve consistently the key performance indicators (KPIs) determined by company
P9. Manage funnel by: › 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	P9. Maintain account management for existing clients
	P10. Recognize and manage specific funnel characteristics: › 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
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	P1. Develop list of sources for developing prospects and use information towards generating client intelligence
P2. Use scripted outreach practices to span wide range of prospective clients and to target well-aligned clients	P2. Develop target profile for potential clients: › 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
P3. Build network to leverage relationships, to create new connections and referral network	P3. Build and manage network to leverage relationships and create new connections and referral network
P4. Conduct customer needs analysis for various sales opportunities related to specific products or services	P4. Conduct SWOT analysis for various sales opportunities
P5. Conduct research on potential clients, for example: › industry vertical › competitor › challenges › basic financial situation › people roles, responsibilities and influence, e.g. LinkedIn	P5. Synthesize research reports to develop understanding of clients' requirements, for example: › advanced financial analysis › market research › analyst reports (internal and/or external)
P6. Use list of qualification questions	P6. Prepare list of qualification questions
P7. Use company-provided tools and technology to obtain relevant insight	P7. Leverage advantages or limitations of tools and technology to provide relevant insight into clients, e.g. client relationship management (CRM) tools
P8. Identify the client interaction or compelling event that will allow to move to the next step with client	P8. Create list of potential compelling events for industry that will allow movement to next stages with client
P9. Initiate contact with the client using practices provided	P9. Tailor technique or approach when initiating contact with client, to meet its needs
P10. Deliver pre-established elevator pitch that differentiates own organization from competition	P10. Deliver appropriate elevator pitch that differentiates own organization from competition

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
P1. Establish rapport by finding common ground	P1. Apply best-supported methods for establishing rapport with specific clients
P2. Create a positive first impression and establish credibility with client: › identify client concerns › present methods for addressing concerns › establish dialogue with client to understand client company and business	P2. Have perspective of different audience types and structure relationships accordingly
P3. Ask client of preferred method to communicate, e.g. email, phone	P3. Adjust approach to accommodate variance in clients' characteristics, needs, goals and objectives
P4. With guidance, leverage internal and external subject matter experts (SMEs) to ensure client needs are understood: › Summarize what is known about client needs and prepare those who have been brought in to assist	P4. Recognize the impact of cultural, demographic, and generational differences to adapt approach and style
P5. Validate assumptions about clients' budget and purchasing authority	P5. List methods to communicate with different clients at various stages of the sales cycle
P6. Collect information related to client's decision-making process, organization structure and profile of all individuals involved in the purchasing decision	P6. Identify key internal and external subject matter experts (SMEs) to recruit to ensure client needs are best understood: › whom to bring in › when to bring them in
P7. Maintain client/contact management files: › Keep files organized	P7. Validate assumptions about client's financial status and purchasing readiness
P8. Track client information, next steps and follow up notes	P8. Leverage information related to client's decision-making process, organization structure and profile of all individuals involved in the purchasing decision
	P9. Establish client/contact file management best practices

30 QUESTIONS. 30 MINUTES. SEE HOW YOUR CLIENT RELATIONSHIP SKILLS MEASURE UP AT CPSA.COM/ASSESSMENT

P9. Stay engaged, be mindful of milestones, next steps

P10. Conduct scheduled client interaction

P11. Conduct a follow-up communication schedule

P12. React to client inquiries and prioritize follow-up to build relationships

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

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
P1. Identify purpose of communication	P1. Organize ideas in terms of: › prioritizing statements › emphasizing key messages
P2. Organize ideas in a logical sequence	P2. Outline and use supported question techniques to understand client's needs, goals and objectives, both professional and personal
P3. Use basic question techniques to understand client's needs, goals and objectives, both professional and personal	P3. Outline and utilize professional and public speaking best practices
P4. Speak clearly: › use correct grammar and pronunciation › avoid excessive filler words, e.g. um, uh, you know, okay	P4. Anticipate client concerns and questions and proactively address them with the client
P5. Speak to client concerns and questions utilizing guided techniques and templates	P5. Adapt language and level of formality to meet needs of audience
P6. Refrain from lecturing or using condescending tones	P6. Use non-verbal communication to reinforce verbal message, e.g. pauses, eye contact
P7. Avoid controversial or inappropriate issues	P7. Construct effective communication plans with built-in methods for follow-up at key points in the sales cycle
P8. Adjust tone, inflection, volume and speed according to intent of message, e.g. follow a script	P8. Select appropriate communication method based on desired intent and client needs
P9. Use precise, easy-to-follow language, e.g. avoid use of industry jargon	
P10. Use non-verbal communication to reinforce verbal message, e.g. pauses, eye contact.	
P11. Use communication tools throughout the various stages of the sales cycle	

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

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: › 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 P2. Consult with colleagues or partners who could assist with solutions P3. Develop a solution with client in mind, e.g. specific requests or constraints, budget requirements, alignment with goals and objectives P4. Validate client agreement with proposed solution concepts P5. Implement potential solutions to meet client needs: › resolve issues › focus on interests and goals P6. Apply selected, appropriate problem-solving skills to find a solution P7. Manage client expectations while being realistic	P1. Analyze data collected in discovery phase and provide recommendations P2. Recommend colleagues or partners that could assist with solution P3. Identify potential solutions to meet client needs P4. Consider innovative sales methods and approaches P5. Weigh the advantages and disadvantages of each option P6. Persevere in difficult situations: › Remain goal-oriented and focused P7. Collaborate with clients to provide best solution that meets their needs P8. Clearly define business case in financial terms: › 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
P1. Prepare a tailored presentation for the client: › Maintain relevance during presentation, stay on topic › Anticipate client questions P2. Present information about product and service being offered, aligning them with client's needs, following a standardized format or template: › use presentation aids, e.g. audio, visual, print › prepare support materials, e.g. brochure, pamphlets, registration forms › interact with audience › manage time P3. Anticipate and overcome potential objections: › provide responses relevant to client concerns › provide client with explanation or offer alternative solution › maintain positive attitude › consider personality type of client P4. Provide limited information on specific data and numbers P5. Apply the same level of focus and attention towards all participants during the presentation P6. Deliver presentations online when required	P1. Prepare a tailored presentation for the client: › maintain relevance during presentation › stay on topic › anticipate and address client questions and concerns P2. Quantify benefits of products and services being offered, aligning them with client's needs P3. Anticipate and overcome potential objections: › 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 P4. Speak about data and numbers: › interpret information › answer client questions P5. Apply the same level of focus and attention towards all participants during the presentation

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

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
P1. Outline benefits of third-party relationship in support of various stages of the sales cycle: › Lead generation › References › Subject Matter Expertise	P1. Identify opportunities for strategic relationships: › Analyze internal organizational gaps P2. Identify potential partners using selection criteria, e.g ability to meet needs, compatibility P3. Research potential partner's background, e.g creditworthiness, financial situation, reputation in marketplace, ethical standards, conflict of interest P4. Collaborate to define working relationship and formal agreement P5. Monitor compliance with contract terms and conditions P6. Cultivate ongoing relationship, for example: › 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
P1. Confirm and follow up on sale using designated process: › 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 P2. Follow up during and after product or service delivery: › 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	P1. Establish and implement systems for ensuring timely and efficient follow-up P2. Analyze feedback collected and identify action items for future improvement 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

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
P1. Demonstrate understanding of own organization's core values, mission, vision, goals, and objectives P2. Demonstrate knowledge of own organization's products and services	P1. Leverage own organization's core values, goals and objectives in the creation of solutions for clients, for example: › Understand the competitive position of your own organization › Understand unique value proposition P2. Capitalize on features, advantages and benefits of products and services in solution creation, for example: › 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
P1. Understand the relevance of financial statements as they relate to developing client intelligence P2. Demonstrate understanding of basic financial formulas, including revenue, costs, pricing discounts, profits and losses, return on investment, and return on time invested: › define formula elements › make calculations using basic formulas	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 P2. Understand the financial health of a client's business prior to pursuing potential sales opportunities P3. Calculate costs in foreign currency using currency conversion calculators P4. Forecast deal profitability with complex variables, e.g. rebate, investment vs return P5. Analyze relevance of financial statements: › seek assistance from finance department to assess client potential P6. Manage financial considerations for strategic accounts P7. Forecast client's business multiple years out P8. Recognize total and lifetime value of a client P9. Translate capital expenditure to operational expenditures P10. Remain current on the financial trends influencing own industry and client's industry P11. Calculate profit margin of different product lines P12. Create profit and loss statements for own accounts

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 P2. Understand delegation of legal responsibilities, e.g. legal department, procurement team P3. Escalate legal matters to immediate supervisor when required	P1. Demonstrate high-level understanding of sales-related terms and conditions P2. Involve legal expertise 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
P1. Apply appropriate format of social media for industry P2. Use selected social media platforms for various phases of sales strategy: › Prospecting › Presentation › Relationship building › Providing value P3. Hold conversations through social media and sharing of information: › Establish regular communication schedule, frequency of blogging/posting P4. Promote company profile P5. Use created and adjusted content to match sales process P6. Promote company product and services P7. Collect data analytics of social selling to understand trends P8. Recognize impact of all personal social media activity on the company	P1. Analyze and develop list of social media platforms best-suited for various phases of sales strategy based on specific company or industry context P2. Routinely hold conversations through social media and sharing of information P3. Leverage and promote company profile P4. Create and adapt content to match sales process P5. Analyze data analytics of social selling to understand trends P6. Analyze implications of all personal social media activity on the company

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 P2. Adhere to organization's policies and procedures P3. Comply with legislation P4. Take responsibility for actions and decisions P5. 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 P6. Use ethical principles in decision making processes P7. Identify situations that may create ethical dilemmas P8. Respond to ethical dilemmas according to code of ethics/conduct: › 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	P1. Act in the best interests of the company, the community and the environment P2. Interpret policies and procedures for the company P3. Comply with legislation and develop compliance best practices P4. Interpret new legislation and its impact on current processes and procedures P5. Take responsibility for actions and decisions P6. 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 P7. Use ethical principles in decision making processes 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
P1. Use proactive approaches to perform tasks without guidance and communicate status updates	P1. Gain trust and respect for proactively driving results for assigned areas within the overall business
P2. Build trust and respect through interactions with others	P2. Establish plan to improve services and create efficiencies
P3. Identify areas for improved services and efficiencies	P3. Determine the timeframe to meet deliverables and regularly meet commitments
P4. Align actions with own company's and client's mission and strategic objectives	P4. Establish a professional network by developing and maintaining ongoing relationships with peers and suppliers to meet client's needs
P5. Meet commitments in designated timeframe and in accordance with expected deliverables: › meet target metrics	P5. Demonstrate confidence
P6. Accept constructive feedback and adjust behaviour	P6. Meet commitments in designated timeframe and in accordance with expected deliverables: › meet target metrics
P7. Exhibit tenacity	P7. Accept constructive feedback and adjust behaviour

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
P1. Understand the org chart and who has decision-making power	P1. Leverage roles in organizational chart, as necessary
P2. Understand key organizational influencers	P2. Establish roles and responsibilities of key company influencers
P3. Respect team members' ideas and opinions	P3. Seek team members' ideas and opinions to implement in solution creation
P4. Establish trust with clients and colleagues	P4. Establish trust in relationships and promote within team
P5. Communicate regularly with team members, e.g. share information and opportunities	P5. Communicate regularly with team members, e.g. share information and opportunities
P6. Manage conflicts with co-workers in positive manner	P6. Recognize contributions of all staff
P7. Assist team members when possible	P7. Regularly provide assistance to team members
P8. Recognize and support achievement of team sales objectives/goals	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
P1. Determine short- and long-term professional goals P2. Pursue formal and informal options to advance professional development goals, for example: › 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 P3. Practice client-based role-plays and sales simulations P4. Participate in industry and community events and activities, for example: › 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 P5. Apply new learning to the job, for example: › approaches › technology and software › templates and forms P6. Share new information and experience with colleagues	P1. Analyze and adapt short and long term professional goals to create a professional development plan with actionable steps and timelines. P2. Identify skills and knowledge gaps, for example: › legislation and regulation changes and updates › trends and issues › new approaches and technologies P3. Design client-based role-plays and sales simulations P4. Map-out applicable industry and community events P5. Analyze and apply advantages and benefits of new learning to the job P6. Share with others lessons learned about difficult or complex situations P7. Establish best practices to share with colleagues, including: › 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
P1. Identify own strengths and weaknesses and how they impact the sales process P2. Identify influence of various selling styles P3. Apply provided template for elevator pitch P4. Ensure personal brand aligns with own organization's values and culture	P1. Establish link between own personality traits and characteristics and how they influence others P2. Recognize influence of various selling styles and adapt with own characteristics to create selling style P3. Develop and refine elevator pitch P4. Refine personal brand to ensure alignment with own organization's

A competent practitioner must know:

K1. Components of personal brand

SEE HOW YOUR SKILLS MEASURE UP

TAKE THE CPSA SALES ASSESSMENT

Whether you are just starting your sales career or are already a seasoned sales professional, it's important to understand your strengths and areas for improvement on a regular basis.

WHY TAKE THE CPSA SALES ASSESSMENT?

In less than 30 minutes, the CPSA Sales Assessment's 30 questions will challenge your day-to-day skills as a sales professional. Each question has been designed and vetted by sales professionals to assess you based on CPSA's sales competency framework.

WHAT DO YOU GET WHEN YOU TAKE THE CPSA SALES ASSESSMENT?

The CPSA Sales Assessment helps guide your professional development priorities for the year. As a member benefit, your comprehensive results report gives you a detailed insight into your current strengths and areas of development.

30 questions. 30 minutes.
Learn more about your skills and
improve your performance with our
assessment at **CPSA.com/assessment**

DEVELOPING CLIENT-FOCUSED SOLUTIONS

The CPSA has aligned many of the competencies outlined in this guide with the new Skills and Competencies Taxonomy from Economic and Social Development Canada.

Please see below for skill and competency alignment between the two frameworks.

	Prospecting	Fostering Client Relationships	Developing Client-Focused Solutions	Negotiating and Closing	Following Up	Business Acumen	Sales Process Technology	Professional Sales Conduct
Foundational Skills								
Reading comprehension	•	•			•	•	•	•
Writing	•	•			•		•	
Numeracy			•	•	•	•		
Oral communication: Active listening		•	•	•				•
Oral communication: Oral comprehension	•	•		•	•			•
Oral communication: Oral expression		•	•		•			•
Digital Skills			•		•		•	
Analytical Skills								
Critical thinking	•		•	•		•		•
Decision making	•		•	•		•		•
Evaluation	•		•	•		•	•	•
Learning strategies						•	•	•
Operations analysis	•		•					
Problem solving	•		•			•		•
Quality control analysis								•
Researching & investigating	•		•	•		•		•
Systems analysis			•			•		•
Technical Skills								
Operation and control							•	
Troubleshooting							•	
**Other Technical Skills are not applicable*								
Resource Management Skills								
Change management			•					
Crisis management								
Job task planning & organization					•		•	•
Management of financial resources			•			•		
Management of material resources			•					
Management of personnel resources								
Monitoring	•			•			•	•
Operational planning	•		•		•	•		•
Projecting outcomes	•		•	•		•		•
Risk management			•	•		•		
Strategic planning	•		•			•	•	•
Talent management								
Time management		•	•					•
Interpersonal Skills								
Coordinating		•		•				•
Instructing								•
Intercultural skill		•	•	•				•
Managing conversation		•		•				•
Negotiating				•				
Persuading		•	•	•				•
Service orientation			•	•				•
Social perceptiveness	•	•	•	•			•	•
Working with others		•	•	•				•

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.

Advancing Sales. Accelerating Performance.

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