COMPETENCY-BASED OCCUPATIONAL FRAMEWORK FOR REGISTERED APPRENTICESHIP

Commercial and Technical Sales

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Acknowledgments

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Competency-Based Occupational Frameworks

The Urban Institute, under contract with the US Department of Labor, has worked with employers, subject matter experts, labor unions, trade associations, credentialing organizations, and academics to develop Competency-Based Occupational Frameworks (CBOFs) for Registered Apprenticeship programs. These frameworks define the **purpose** of an occupation, the **job functions** that are carried out to fulfill that purpose, the **competencies** that enable the apprentice to execute those job functions well, and the **performance criteria** that define the specific knowledge, skills, and personal attributes associated with high performance in the workplace. This organizational hierarchy—job purpose, job functions, competencies, performance criteria—is designed to illustrate that performing work well requires more than just acquiring discrete knowledge elements or developing a series of manual skills. To perform a job well, the employee must be able to assimilate knowledge and skills learned in various settings, recall and apply that information to the present situation, and carry out work activities using sound professional judgment, demonstrating an appropriate attitude or disposition and achieving a level of speed and accuracy necessary to meet the employer's business need.

The table below compares the terminology of Functional Analysis with that of traditional Occupational Task Analysis to illustrate the important similarities and differences. While both identify the key technical elements of an occupation, functional analysis includes the identification of behaviors, attributes, and characteristics of workers necessary to meet an employer's expectations.

Framework Terminology	Traditional Task Analysis Terminology
Job Function: the work activities that are carried out to fulfill the job purpose	Job Duties: roles and responsibilities associated with an occupation
Competency: the actions an individual takes and the attitudes he/she displays to complete those activities	Task: a unit of work or set of activities needed to produce some result
Performance Criteria: the specific knowledge, skills, dispositions, attributes, speed, and accuracy associated with meeting the employer's expectations	Subtask: the independent actions taken to perform a unit of work or activity

Although designed for use in competency-based apprenticeship, these Competency-Based Occupational Frameworks also support time-based apprenticeship by defining more clearly and precisely what an apprentice is expected to learn and do during the allocated time period.

CBOFs are comprehensive to encompass the full range of jobs that may be performed by individuals in the same occupation. As employers or sponsors develop their individual apprenticeship programs, they can extract from or add to the framework to meet their unique organizational needs.

Components of the Competency-Based Occupational Framework

Occupational Overview: This section of the framework provides a description of the occupation including its purpose, the setting in which the job is performed, and unique features of the occupation.

Work Process Schedule: This section includes the job functions and competencies that would likely be included in an apprenticeship sponsor's application for registration. These frameworks provide a point of reference that has already been vetted by industry leaders so sponsors can develop new programs knowing that they will meet or exceed the consensus expectations of peers. Sponsors maintain the ability to customize their programs to meet their unique needs, but omission of a significant number of job functions or competencies should raise questions about whether or not the program has correctly identified the occupation of interest.

Cross-Cutting Competencies: These competencies are common among all workers and focus on the underlying knowledge, attitudes, personal attributes, and interpersonal skills that are important regardless of the occupation. That said, while these competencies are important to all occupations, the relative importance of some versus others may change from one occupation to the next. These relative differences are illustrated in this part of the CBOF and can be used to design pre-apprenticeship programs or design effective screening tools when recruiting apprentices to the program.

Detailed Job Function Analysis: This portion of the framework includes considerable detail and is designed to support curriculum designers and trainers in developing and administering the program. The detail in this section may be confusing to those seeking a more succinct, higher-level view of the program. For this reason, we recommend that the Work Process Schedule be the focus of program planning activities, leaving the detailed job function analysis sections to instructional designers as they engage in their development work.

a. Related Technical Instruction: Under each job function appears a list of foundational knowledge, skills, tools, and technologies that would likely be taught in the classroom to enable the apprentice's on-the-job training safety and success.

b. Performance Criteria: Under each competency, we provide recommended performance criteria that could be used to differentiate between minimally, moderately, and highly competent apprentices. These performance criteria are generally skills based rather than knowledge based, but may also include dispositional and behavioral competencies.

Using the Competency-Based Occupational Framework to Develop a Registered Apprenticeship Program

When developing a registered apprenticeship program, the Work Process Schedule included in this CBOF provides an overview of the job functions and competencies an expert peer group deemed to be important to this occupation. The Work Process Schedule in this document can be used directly, or modified and used to describe your program content and design as part of your registration application.

When designing the curriculum to support the apprenticeship program—including on-the-job training and related technical instruction—the information the Detailed Job Functions section could be helpful. These more detailed job function documents include recommendations for the key knowledge and skills that might be included in the classroom instruction designed to support a given job function, and the performance criteria provided under each competency could be helpful to trainers and mentors in evaluating apprentice performance and insuring inter-rater reliability when multiple mentors are involved.

Commercial and Technical Sales Occupational Overview

Occupational Purpose and Context

This qualification is Commercial and Technical Sales qualification. Individuals engaged in this role requires them to identify sales opportunities relevant to the market they are working in. They are able to undertake research and analyze markets enabling them to bring new business into an organization. Polished communication, negotiation and presentation skills, they open sales discussions, finalize and close sales.

An effective account manager, they support and manage customer accounts, providing solutions to problems for the benefit of the customer and organization consolidating business to business loyalties. Excellent verbal and written language skills, ensures they engage with customers at all levels, as communication via phone calls and electronic mail is a major component of the role.

Organizational and self-management skills is highly valued as they will be required to manage customer databases, work independently and identify their individual professional development requirements. They often provide administrative and customer service support for their departments, including answering phone calls, filing, and data entry.

Potential Job Titles

Account Manager, Sales Director, Sales Manager, Sales Engineer, Account Executive, Customer Engagement Manager, Technical Sales Engineer, Sales Consultant, Sales Representative, Salesman, Area Sales Manager, Account Supervisor, Account Manager, Business Development Manager, Marketing and Sales Coordinator, Account Development Manager, Distribution Sales Manager, Channel Sales Director, Territory Manager, Sales Specialist, Zone Business Manager.

Attitudes and Behaviors

Highly passionate and ethical; a critical thinker with highly developed negotiation and problem solving skills; ability to communicate effectively with all cultures and diverse backgrounds; excellent face to face communication skills; proficient customer service orientation and professional demeanor; able to multitask; adaptable; flexible; self-driven; motivated; effective time manager; comfortable working in a fast-paced

environment; and conducts oneself with integrity and honesty. Well rounded written and technology skills; ability to research and analyze data.

Apprenticeship Prerequisites

N/A

Occupational Pathways

There are multiple entry pathways for Commercial and Technical Sales professionals. To succeed in their roles, Commercial and Technical Sales professionals need strong general sales and client development skills and detailed technical or scientific knowledge regarding their product range.

As the nature of commercial and technical sales involves the vending of products significant to the customer's supply chain or business processes, there is significant scope of specializations: medical diagnostic equipment, engineering, manufacturing systems, production software etc.

Certifications, Licensure, and Other Credential Requirements

Credential	Offered by	Before, During, or After Apprenticeship
Associate Degree in Sales	Various	During, After

Job Functions

Job Functions	Core or Optional
1. Conduct research and profile a market	Core
2. Apply prospecting methods and develop a sales plan	Core
3. Undertake marketing activities	Core
4. Develop product knowledge	Core
5. Establish and maintain networks and customer relationships	Core
6. Present, secure and support sales	Core
7. Deliver and monitor a service to customers	Core
8. Comply with laws, regulations, standards and policies	Core
9. Manage personal work priorities and professional development	Optional

Stackable Programs

This occupational framework is designed to link to the following additional framework(s) as part of a career laddering pathway.

Stackable Programs	Base or Higher Level	Stacks on Top of
N/A		

Levels

Industry advisors have indicated that individuals in this occupation may function at different levels, based on the nature of their work, the amount of time spent in an apprenticeship, the level of skills or knowledge mastery, and the degree of independence in performing the job or supervisory/management responsibilities.

Level	Distinguishing Features	Added Competencies	Added Time Requirements
Entry Level	Learning the basics of the sales function through on-the-job experience, gaining experience over time. Focus on lead generation and prospecting.	Time management, communication skills	
Mid-level / Experienced /Account Manager	Overall responsibility for a product or client. Focus on management of key or strategic accounts.	Sales profiling, negotiation	
Senior Level / Vice-President	Responsibility for a market segment or overall sales function of the organization. Focus on sales team management responsibilities	Strategy development and staff management	

Work Process Schedule

WORK PROCESS SCHEDULE Commercial and Technical Sales	ONET Code: 41-4011.00 RAPIDS Code: 2075 / 2087CB

Job Title: Commercial and Technical Sales	
Level:	Specialization: TBD
Stackable Program: __Yes __No **Base Occupation Name:**	
Company Contact:	

Address:	Phone:	Email:
Apprenticeship Type: X Competency Based __Time Based __Hybrid	**Prerequisites:**	

Job Function 1: Conduct research and profile a market			
Competencies	**Core or Optional**	**RTI**	**OJT**
A. Develop research methodology and objectives	Core		
B. Research potential new markets and assess opportunities to enter, shape or influence each market and their likely contribution to the business	Core		
C. Undertake analysis of markets to determine viability of business opportunities	Core		
D. Develop and prepare research reports /market positioning strategy	Core		
E. Identify and access a range of information systems and databases to manage customer information	Core		

Job Function 2: Apply prospecting methods and develop a sales plan			
Competencies	**Core or Optional**	**RTI**	**OJT**
A. Employ prospecting methods and qualify prospects	Core		
B. Develop and monitor a sales plan to achieve sales goals and quotas	Core		
C. Understand the benefits of CRM and SFA in sales and marketing	Core		

Job Function 3: Undertake marketing activities			
Competencies	**Core or Optional**	**RTI**	**OJT**
A. Identify and evaluate marketing opportunities ensuring characteristics of products meet consumer priorities, needs and preferences	Core		
B. Assess environmental factors and their impact on marketing mix	Core		
C. Determine promotional strategies and develop promotional material	Core		
D. Conduct digital/ e-marketing communications	Core		
E. Implement marketing activities within budgetary constraints to meet legal, ethical and organizational requirements	Core		

Job Function 4: Develop specialized product knowledge			
Competencies	**Core or Optional**	**RTI**	**OJT**
A. Develop product knowledge relevant to the industry	Core		
B. Promote products and services to stakeholders	Core		
C. Convert product and service knowledge into sales strategies	Core		

Job Function 5: Establish and maintain networks and customer relationships			
Competencies	**Core or Optional**	**RTI**	**OJT**
A. Develop and maintain effective customer relationships and industry networks	Core		
B. Develop an online presence for customer engagement	Core		
C. Ensure customer rights and responsibilities are upheld	Core		
D. Satisfy complex customer needs	Core		

	Core or Optional	RTI	OJT
E. Manage quality customer service practices	Core		
F. Maintained customer records are in accordance with organizational procedures	Core		
G. Work effectively with culturally diverse colleagues, clients and customers	Core		
H. Develop and use effective communication strategies	Core		

Job Function 6: Present, secure and support sales

Competencies	Core or Optional	RTI	OJT
A. Plan and develop a customer profile and needs analysis	Core		
B. Plan and prepare a sales and presentation to match the characteristics of the target audience	Core		
C. Negotiate, finalize and close sales	Core		
D. Support post-sale activities	Core		

Job Function 7: Deliver and monitor a service to customers

Competencies	Core or Optional	RTI	OJT
A. Identify and respond to customer needs	Core		
B. Deliver and build a personalized service to customers in a professional manner	Core		
C. Manage and resolve customer complaints	Core		
E. Support post-sale activities	Core		

Job Function 8: Comply with laws, regulations, standards and policies

Competencies	Core or Optional	RTI	OJT
A. Identify and interpret key provisions of relevant legislation from all levels of government that affect business operations	Core		

Job Function 9: Manage personal work priorities and professional development

Competencies	Core or Optional	RTI	OJT
A. Organize personal work priorities in accordance with organizational requirements	Core		
B. Co-ordinate and manage personal skill development	Core		
C. Develop and maintain professional competence	Core		

Cross-Cutting Competencies

	COMPETENCY**	0	1	2	3	4	5	6	7	8
Personal Effectiveness	Interpersonal Skills	X	X	X						
	Integrity	X	X							
	Professionalism	X	X							
	Initiative	X	X	X						
	Dependability and Reliability	X	X							
	Adaptability and Flexibility	X	X							
	Lifelong Learning	X								
Academic	Reading	X	X							
	Writing	X	X							
	Mathematics	X	X							
	Science and Technology	X	X							
	Communication	X	X	X						
	Critical and Analytical Thinking	X	X							
	Basic Computer Skills	X	X							
Workplace	Teamwork	X								
	Customer Focus	X	X							
	Planning and Organization	X								
	Creative Thinking	X	X							
	Problem Solving and Decision Making	X								
	Working with Tools and Technology	X								
	Checking, Examining, and Recording	X								
	Business Fundamentals	X	X							
	Sustainable	X								
	Health and Safety	X	X							

** The names of the cross-cutting competencies come from the US Department of Labor's Competency Model Clearinghouse, and definitions for each can be viewed at https://www.careeronestop.org/CompetencyModel/competency-models/building-blocks-model.aspx.

Cross-cutting competencies identify transferable skills—sometimes called "soft skills" or "employability skills"—that are important for workplace success, regardless of a person's occupation. Still, the relative importance of specific cross-cutting competencies differs from occupation to occupation. The cross-cutting competencies table, above, provides information about which of these competencies is most important to

be successful in a particular occupation. This information can be useful to employers or intermediaries in screening and selecting candidates for apprenticeship programs, or to pre-apprenticeship providers who seek to prepare individuals for successful entry into an apprenticeship program.

The scoring system used to evaluate competency levels required in each cross-cutting skill aligns with the recommendations of the Lumina Foundation's Connecting Credentials Framework. The framework can be found at http://connectingcredentials.org/wp-content/uploads/2015/05/ConnectingCredentials-4-29-30.pdf.

Detailed Job Functions

Job Function 1: Conduct research and profile a market

Related Technical Instruction		
KNOWLEDGE	**SKILLS**	**TOOLS & TECHNOLOGIES**
• Organizational policies and procedures and legal and ethical obligations relating to workplace information • Principles and practices of market research including: - data processing methods and data analysis techniques - qualitative and quantitative research - Boolean operators and other search tools - analysis concepts and processes • Report preparation and presentation	• Literacy skills to read, write and proofread documents to ensure clarity of meaning and accuracy • Problem-solving skills to deal with information which is contradictory, ambiguous, inconsistent or inadequate • Technology skills to select appropriate technology • Research skills to identify and access information • Information management skills to collate and extract findings • Teamwork skills to work with others	• Computer software applications (computer database user interface and query software) • Computers • CRM & SFA business technologies • Email • Internet/extranet/intranet • Telephone systems, (including computer based systems)

Competency A: Develop research methodology and objectives	Core or Optional
PERFORMANCE CRITERIA	
1. Identify and review market segments for their usefulness in terms of factors such as their size, potential, distinctive needs, easy identification of members or distinctive media use patterns	Core
2. Assess external factors, costs, benefits, risks and opportunities to determine the financial viability and opportunity of each marketing segment	Core
3. Develop contingency arrangements to manage variations in production and market prices	Core
4. Apply statistical analysis tools to information to identify product, market and customer trends	Core
5. Investigate causal influences in data and base decision-making on available data	Optional
6. Analyze and synthesize research information, and seek assistance as required	Core

Competency B: Research potential new markets and assess opportunities to enter, shape or influence each market and their likely contribution to the business	Core or Optional
PERFORMANCE CRITERIA	
1. Identify trends and opportunities and evaluate in respect to customer requirements	Core
2. Identify available strategic marketing options and select targeting strategies which best satisfy the requirements of the marketing plan	Core
3. Use a range of information sources to identify key attributes of competitors' products	Core
4. Research and establish criteria for qualifying leads according to buyer accessibility, buyer motives, product affordability, purchase authority, legal compliance and return for seller	Core
5. Develop a stakeholder analysis report relevant to particular target markets and organizations	Optional

Competency C: Undertake analysis of markets to determine viability of business opportunities	Core or Optional
PERFORMANCE CRITERIA	
1. Evaluate and compare features, benefits, strengths and weaknesses of competitors' products with own products	Core
2. Conduct cost-benefit analysis to determine the financial viability and return on investment of marketing opportunities	Core
3. Conduct analysis on statistics, quantifying data, quality measurements, market trends and potential customers	Core
4. Interpret and aggregate data and information, including categorization, to provide observations relevant to research objectives	Optional
5. Collate information, document and report recommendations to relevant personnel within the organization	Core

Competency D: Develop and prepare research reports /market positioning strategy	Core or Optional
PERFORMANCE CRITERIA	
1. Develop a market positioning strategy that documents market segmentation, consumer profiling, targeting and strategies relevant to a product or service	Core
2. Identify consumer characteristics in standard statistical terms and/or the descriptive terms used in media selection in the consumer profile	Core
3. Use demographic and/or psychographic descriptions in the consumer profile in accordance with the requirements of the marketing plan	Core
4. Collate and assess findings for relevance and usefulness to research objective	Optional
5. Prepare research reports	Optional
6. Communicate research findings to relevant personnel and stakeholders in accordance with organizational procedures	Optional

Competency E: Identify and access a range of information systems and databases to manage customer information	Core or Optional
PERFORMANCE CRITERIA	
1. Identify tools gather collect and collate data and information	Core
2. Access and use software technology and programs to enter data and information	Core
3. Record data and information gathered in approved formats, in accordance with organizational procedures	Core
4. Store and safeguard survey information and data in accordance with organizational procedures	Core
5. Ensure data input meets designated timelines and organizational requirements for speed and accuracy	Core
6. Run reports and queries to check that results and formulae provide the required data	Core
7. Preview, adjust and produce database reports or forms in accordance with organizational and task requirements	Core
8. Prepare and distribute reports to appropriate personnel in a suitable format	Core

Job Function 2: Apply prospecting methods and develop a sales plan

Related Technical Instruction		
KNOWLEDGE	**SKILLS**	**TOOLS & TECHNOLOGIES**
• Prospecting methods and management strategies • Key features of the buying and selling processes • discuss the key features of conflict resolution and persuasion techniques, including how to overcome buyer resistance • Current industry product and service trends • Key features of organizational policy and procedures relevant to prospecting for new clients • Customer Relationship Management (CRM) and Sales Force Automation (SFA) product software	• Oral communication skills to establish a sales response • Literacy skills to research and analyze key features of information to address specific criteria and develop recommendations • Numeracy skills to calculate compare and estimate numerical and financial information • Technology skills to use a range of digital systems and tools to record, access, filter, extract, organize and present information • Writing skills to prepare and develop sales plans, reports, proposals and presentations • Research and analytical skills to identify trends and positions of products and services • Self-management skills to organize, prioritize and self-motivate	• Computer software applications • Computers • CRM & SFA business technologies • Email • Internet/extranet/intranet • Telephone systems, (including computer based systems)

Competency A: Employ prospecting methods and qualify prospects	Core or Optional
PERFORMANCE CRITERIA	
1. Identify prospective customers by using business directories, following leads, attending trade shows and conferences	Core
2. Monitor market conditions, product innovations, and competitors' products, prices and sales	Core
3. Develop and implement systems for recording prospect information	Core
4. Monitor and evaluate effectiveness of system for recording prospect information	Core

Competency B: Develop and monitor a sales plan to achieve sales goals and quotas	Core or Optional
PERFORMANCE CRITERIA	
1. Establish consultation and communication processes and structures with clients and supervisors	Core
2. Develop an individualized sales plan for each product or client to meet customer needs	Core
3. Monitor, review and adjust sales plan in response to new information	Core
4. Complete routine reports at regular intervals according to organizational requirements	Core

Competency C: Understand the benefits of CRM and SFA in sales and marketing	Core or Optional
PERFORMANCE CRITERIA	
1. Use a Customer Relationship Management System (CRM) to access customer information and maintain data integrity	Core
2. Use a Sales Force Automation System (SFA) to access customer and product information, and to monitor and control sales	Core
3. Analyze performance data from all areas of the business to determine success of marketing and sales activities	Core
4. Identify over-performing and under-performing products and services to be considered for redevelopment or withdrawal	Core
5. Forecast existing and emerging market needs based on information available using forecasting techniques	Core
6. Maintain systems, records and reporting procedures in accordance with organizational requirements	Core
7. Identify and rectify information system and processing errors	Core

Job Function 3: Undertake marketing activities to sales prospects

Related Technical Instruction		
KNOWLEDGE	**SKILLS**	**TOOLS & TECHNOLOGIES**
• Key provisions of relevant legislation, codes of practice and national standards that affect marketing operations • Markets specific to the product or service • Sales networks and distribution systems, customer trends and preferences, relevant to product or service • Financial management and budgeting practices • Competitors' strengths and weaknesses • Sales and marketing principles and practices	• Analytical skills to undertake market research, assess alternative marketing strategies and techniques to meet business plan objectives • Numeracy skills to estimate, calculate, assess financial strategies and prepare budgets • Literacy skills to read and understand documentation and written reports • Communication skills to question, actively listen, clarify and respond to a range of views • Interpersonal skills to work with others and relate to people from a range of cultural, social and religious backgrounds and with a range of physical and mental abilities	• Computer software applications • Computers • CRM & SFA business technologies • Email • Internet/extranet/intranet • Telephone systems, (including computer based systems)

Competency A: Identify and evaluate marketing opportunities ensuring characteristics of products meet consumer priorities, needs and preferences	Core or Optional
PERFORMANCE CRITERIA	
1. Prioritize marketing strategies and identify resources for their implementation, in accordance with organizational requirements	Core
2. Interpret market research plans to identify potential customers and their requirements	Optional
3. Monitor product, pricing and distribution decisions against organizational policy and objectives of the sales and marketing plan	Core
4. Implement internal communication and team-building strategies to ensure personnel responsible for each element of the sales and marketing mix work together to meet the organization's objectives	Core
5. Identify opportunities for improvement through discussion with customers and personnel responsible for each element of marketing mix	Core
6. Evaluate and improve marketing performance	Core

7. Document recommendations for improvement in accordance with organizational requirements	Optional

Competency B: Assess environmental factors and their impact on marketing mix	Core or Optional
PERFORMANCE CRITERIA	
1. Identify and describe consumer characteristics in standard statistical terms and/or descriptive terms used in media selection in consumer profile	Core
2. Identify available positioning strategies and choose a strategy to meet environmental requirements and consumer profile	Core
3. Scope the relative impact of new and alternative technologies on the industry relative to product and customer requirements	Core
4. Monitor current issues of concern to the industry relative to product and customer requirements	Core

Competency C: Determine promotional strategies and develop promotional material	Core or Optional
PERFORMANCE CRITERIA	
1. Analyze promotional methods to determine their importance to marketing outcomes	Core
2. Consider product, pricing, promotional, distribution and service variations, and evaluate these against marketing objectives, target market characteristics and desired positioning	Core
3. Identify and review channels of distribution and estimate their significance to marketing outcomes	Core
4. Select a marketing mix strategy that best satisfies target market and meets marketing objectives	Core
5. Prepare and record detailed plans for promotional activities outlining objectives, level of exposure and other available metrics	Core
6. Create promotional materials that enhance the commercial appeal and brand awareness of the product	Optional
7. Implement marketing activities and organize distribution channels to ensure product and service information is accurate and readily available to clients	Core
8. Review outcomes of promotional activities, prepare reports and conclusions based on verifiable evidence and provide constructive advice for development of future strategies	Core

Competency D: Conduct digital/ e-marketing communications	Core or Optional
PERFORMANCE CRITERIA	
1. Identify website marketing objectives in organization's digital marketing (or online marketing) strategy and plan	Optional
2. Choose media for digital advertisements in accordance with the organization's marketing strategy	Optional
3. Ensure advertisements meet requirements of marketing strategy as well as legal and ethical requirements	Core
4. Ensure website incorporates data recording, contacts and feedback mechanisms to generate sales leads and allow evaluation of website as a marketing tool	Optional
5. Place or disseminate electronic advertisements in accordance with marketing strategy, media contracts, and legal and ethical requirements	Optional
6. Monitor transmission of electronic advertisements or other e-marketing activities and rectify any errors or omissions	Optional
7. Evaluate effectiveness of e-marketing advertisements against measures of effectiveness and record outcomes in accordance with organizational requirements	Core
8. Use outcomes of evaluation activities and other feedback from marketing channels to plan for improvements to e-marketing strategies and products	Core

Competency E: Implement marketing activities within budgetary constraints to meet legal, ethical and organizational requirements	Core or Optional
PERFORMANCE CRITERIA	
1. Develop a gross margin budget to demonstrate the cost-effectiveness of the marketing plan or activity	Optional
2. Ensure advertisements meet requirements of marketing plan as well as legal and ethical requirements	Core
3. Record and communicate priorities, responsibilities, timelines and budgets for promotional activities	Optional
4. Implement marketing activities within budgetary constraints to meet legal, ethical and enterprise requirements	Optional
5. Monitor marketing revenue and costs against budget, analyze and record variations	Optional
6. Evaluate the benefits of promotional activities against defined objectives and incorporate in plans for future promotional activities	Core
7. Prepare and present marketing reports indicating ongoing progress towards marketing objectives	Core

Job Function 4: Develop specialized product knowledge

Related Technical Instruction

KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
• Sources of information for own organization's products and competitors' products • Features, benefits, strengths and weaknesses when describing products • Industry competitors, • Organizational policies and procedures, relevant to the sales process • Key provisions of relevant legislation, regulations, standards and codes of practice that are relevant to the sales process	• Information management skills to identify and source the current industry information • Literacy and numeracy skills to interpret sales data • Analytical skills to identify trends and positions of products and services • Communication skills to convey information factually and accurately without overpowering the client • Presentation skills	• Computer software applications • Computers • CRM & SFA business technologies • Email • Internet/extranet/intranet • Telephone systems, (including computer based systems)

Competency A: Develop product knowledge relevant to the industry	Core or Optional
PERFORMANCE CRITERIA	
1. Acquire and develop knowledge of products in the organization's area of specialty	Core
2. Identify key features, purpose, strengths and weaknesses of the organization's product/s	Core
3. Establish relative standing of the organization's product/s with the competitors' product/s	Core
4. Identify and access information on key stakeholders and industry information appropriate to typical product/s use	Core
5. Source and apply information on future trends related to typical product use	Core
6. Maintain product knowledge and identify current and future issues of concern to ensure updated knowledge is incorporated into sales presentations	Core

Competency B: Promote products and services to stakeholders	Core or Optional
PERFORMANCE CRITERIA	
1. Develop promotional plans and schedules to provide details of products and services being promoted	Core
2. Determine buyer needs and present key features and benefits of product in relation to anticipated buyer needs	Core

3. Structure recommendations to identify clear benefits to clients and the organization, ensuring evidence in support of recommendations is verifiable and appeal as benefits to the buyer	Core
4. Work cooperatively with business customers to maximize product or service sales according to business agreements	Core
5. Identify, integrate and report special events or opportunities for one-off sales and promotional programs	Core
6. Prepare reports for buyers which details suitability, type and conditions of sale for recommended properties	Core
7. Analyze audience feedback and data to determine the impact of the promotional activity on the delivery of products and services	Core

Competency C: Convert product and service knowledge into sales strategies	Core or Optional
PERFORMANCE CRITERIA	
1. Use product and service knowledge to tailor options to specific customer needs, and offer alternatives	Core
2. Identify the strengths and limitations of buyer resistance strategies	Core
3. Use persuasive communication techniques to secure buyer interest	Core
4. Take opportunities to upsell and cross sell products and services that enhance customer request and maximizes profitability of sale	Core
5. Provide recommendations that emphasize product and service issues relevant to client needs	Core

Job Function 5: Establish and maintain networks and customer relationships

Related Technical Instruction		
KNOWLEDGE	**SKILLS**	**TOOLS & TECHNOLOGIES**
• The principles of customer service • Sources of information and techniques for identifying customer needs and reviewing customer satisfaction • The organizational business structure, products and services related to customer service • Product and service standards and best practice models	• Planning and organizational skills • Problem solving to identify and select improvements to systems and processes • Communication skills to respond to and report on customer feedback and complaints • Research skills to locate and analyze feedback information • Communication skills to effectively interact with relevant people • Literacy and numeracy skills - calculate prices and costs - read organizational policies and procedures - read information relating to customer behavior and relationship management	• Computer software applications • Computers • CRM & SFA business technologies • Email • Internet/extranet/intranet • Telephone systems, (including computer based systems)

Competency A: Develop and maintain effective customer relationships and industry networks	**Core or Optional**
PERFORMANCE CRITERIA	
1. Establish regular communication with the customer using appropriate and or preferred communication methods	Core
2. Manage networks to ensure customer needs are addressed through regular communications with customers	Core
3. Develop and implement client loyalty strategies to secure buyer loyalty and facilitate ongoing contact	Core
4. Ensure customer records are maintained in accordance with organizational procedures	Core
5. Provide technical assistance or advice and assist clients to access appropriate after-sales support	Core
6. Participate in business associations and/or professional development activities to establish and maintain a network of support for the business and to enhance personal knowledge of the market	Core
7. Establish communication and network channels to exchange information and ideas about industry specific products and services	Core

Competency B: Develop an online presence for customer engagement	Core or Optional
PERFORMANCE CRITERIA	
1. Clarify the digital marketing needs of the consumer and model engagement conversations and interventions	Optional
2. Improve business customer outcomes and business relationships using an established online presence	Optional
3. Use company website and digital marketing channels to record customer details, using preference collection and feedback mechanisms to allow for evaluation of the efficacy or different online engagement strategies	Optional
4. Obtain feedback to develop and implement strategies which maintain and improve relationships with clients	Core

Competency C: Ensure customer rights and responsibilities are upheld	Core or Optional
PERFORMANCE CRITERIA	
1. Identify and interpret key provisions of relevant legislation from all levels of government that affect business sales operations	Optional
2. Apply knowledge of legal and ethical norms to inform sales and marketing activities	Core
3. Maintain professional standards when using social media and online platforms and ensure any digital data collection activities undertaken adhere to the highest legal and ethical standards	Core
4. Communicate rights and responsibilities of customers to customers, staff and stakeholders as appropriate	Core
5. Understand importance of adhering to organizational ethics and probity standards to ensure corporate integrity	Core
6. Promote a culture of compliance with legislative framework relating to sales and marketing	Core

Competency D: Satisfy complex customer needs	Core or Optional
PERFORMANCE CRITERIA	
1. Address customer concerns and questions in a timely and sensitive manner	Core
2. Assess customer satisfaction levels with service and product, determine and prioritize preferred service options and actions	Core
3. Apply appropriate effective communication techniques to ensure understanding of information received or relayed	Core
4. Develop negotiation skills and utilize conflict resolution strategies to ensure customer relationships are constructive and respectful	Core
5. Address and resolve service problems and difficulties identified through formal and informal feedback	Core

Competency E: Manage quality customer service practices	Core or Optional
PERFORMANCE CRITERIA	
1. Ensure customer needs are fully explored, understood and agreed	Core
2. Ensure customer service practices and targeting activites are in accordance with organizational and legislative and requirements	Core
3. Ensure customer targeting activities are based on up-to-date information about the customer and the products and services available	Core
4. Regularly seek customer feedback and use to improve the provision of products and services	Core
5. Identify opportunities to promote current and additional products and services and existing customers	Core
6. Regularly review customer satisfaction with service delivery using verifiable qualitative and quantitative data sources	Core
7. Report on customer service delivery, ensuring reports are clear, detailed and contain recommendations focused on critical aspects of service delivery	Core

Competency F: Maintained customer records are in accordance with organizational procedures	Core or Optional
PERFORMANCE CRITERIA	
1. Schedule regular time to establish and maintain business contact records	Core
2. Record, update and maintain customer details and interactions in accordance with organizational procedures and available CRM or SFA programs	Core
3. Use available technology to facilitate record-keeping and production of sales reports	Core

Competency G: Work effectively with culturally diverse colleagues, clients and customers	Core or Optional
PERFORMANCE CRITERIA	
1. Recognize and value individual and cultural differences with customers, colleagues and other stakeholders	Core
2. Develop a range of communication styles used to respect and reflect the diversity of the workplace, and ensure interactions consistent with social norms, organizational policies and legislative requirements	Core
3. Use appropriate interpersonal skills to accurately identify customer and stakeholder needs	Core
4. Seek feedback from customers and colleagues to continuously improve personal effectiveness in working with culturally and linguistically diverse stakeholders	Core
5. Recognize and document knowledge, skills and experience of others in relation to both team and organizational objectives	Core

Competency H: Develop and use effective communication strategies	Core or Optional
PERFORMANCE CRITERIA	
1. Develop and use a variety of communication strategies to establish rapport with clients as appropriate	Core
2. Develop and use a variety of communication styles to present organizational products and services to best effect	Core
3. Develop and use non-verbal communication skills to interpret and assess verbal and non-verbal buying signals	Core
4. Identify discrete target groups and adapt communication approaches to suit segments and situations	Core
5. Use listening skills and open-ended questions to identify buyer needs, preferences, motives and objections	Core

Job Function 6: Present, secure and support sales

KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
Related Technical Instruction		

• Product knowledge, including product advantages, disadvantages and service benefits
• Principles for achieving an effective sales presentation mix
• Materials and aids that support presentations
• Principles of effective communication
• Organizational policies and procedures relating to orders and client services
• Strategies to manage client accounts
	• Literacy and numeracy skills to:
	- prepare sales documentation
	- process sales transactions
	- calculate financing arrangements
	- keep client sales records
	• Organizational and time-management skills
	• Culturally appropriate verbal communication skills to:
	- demonstrate product benefits and key features
	- develop rapport and build relationships with clients
	- manage conflict and customer dissatisfaction
	- negotiate to manage buyer resistance
	- question clients to determine client needs and preferences
	• - use persuasive and assertive language in promoting product features and benefits
	• Technological skills to use equipment to assist in presenting sales information
		• Computer software applications
		• Computers
		• Email
		• Internet/extranet/intranet
		• Telephone systems, (including computer based systems)
		• Presentation products and tools
		  – Projector
		  – Graphs
		  – Photographs
		  – Printed materials
		  – Product samples
		  – Whiteboards

Competency A: Plan and develop a customer profile and needs analysis	Core or Optional
PERFORMANCE CRITERIA	
1. Develop a customer needs profile	Core
2. Identify consumer priorities, needs and preferences affecting product and purchasing requirements	Core

Competency B: Plan and prepare a sales and presentation to match the characteristics of the target audience	Core or Optional
PERFORMANCE CRITERIA	
1. Identify principles for achieving an effective sales presentation mix	Core
2. Plan and document presentation approach and intended outcomes	Core
3. Prepare and present sales presentations	Core
4. Use effective presentation strategies and communication principles to deliver presentations	Core
5. Adjust presentation to match needs and preferences of buyer	Core
6. Monitor non-verbal and verbal communication of participants to promote attainment of presentation outcomes	Core
7. Review and evaluate personal performance; modify as required	Core

Competency C: Negotiate, finalize and close sales	Core or Optional
PERFORMANCE CRITERIA	
1. Prepare high-level written communication to secure sales	Core
2. Prepare for and plan sales negotiations and determining desired outcomes and the negotiable and non-negotiable elements of the negotiation	Core
3. Identify customer's financial limitations, discuss estimates, quotes and trading terms	Core
4. Select strategy to close sale, and use supportive and confirming language to support closure	Core
5. Inform customers of benefits associated with promotions and loyalty programs as required	Core
6. Ensuring expected outcomes of a sales negotiation are agreed and clearly understood by both parties	Core
7. Complete sales paperwork, contractual documents and other reports as required	Core

Competency D: Support post-sale activities	Core or Optional
PERFORMANCE CRITERIA	
1. Ensure regular contact is made with customer post-sale to ensure agreed expectations have been met	Core
2. Develop client loyalty objectives to ensure the development of a long term business partnership and personal relationship	Core
3. Offer to provide additional benefits or implement additional sales solutions to clients as opportunities arise	Core
4. Provide regular, effective and targeted feedback to customers to ensure they are aware of and can utilize the full value of the products and services they have purchased	Core

Job Function 7: Deliver and monitor services to customers

Related Technical Instruction		
KNOWLEDGE	**SKILLS**	**TOOLS & TECHNOLOGIES**
• Organizational policy and procedures for customer service, including handling customer complaints • Techniques needed for serving customers, including customers with specific needs • Dealing with difficult customers	• Communication skills to establish rapport and build relationships with customers • Appropriate questioning and active listening skills to identify customer needs • Ability to manage customer feedback • Problem-solving skills to deal with customer enquiries or complaints • Written skills to prepare a reports • Analytical skills to identify trends and positions of products and services	• Computer software applications • Computers • Email • Internet/extranet/intranet • Telephone systems, (including computer based systems)

Competency A: Identify and respond to customer needs	Core or Optional
PERFORMANCE CRITERIA	
1. Ensure customer needs are identified and responded to in a methodical way, consistent with organizational processes	Core
2. Assess customer needs for to determine priorities for service delivery	Core
3. Ensure effective communication techniques are used to obtain and develop understanding of needs-identifying information	Core
4. Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals, where required	Core

Competency B: Deliver and build a personalized service to customers in a professional manner	Core or Optional
PERFORMANCE CRITERIA	
1. Provide customers with personalized service increase the likelihood of identifying and meeting operational needs	Core
2. Collaborate with the customer to determine product or service options most suitable to their needs	Core
3. Proactively seek customer feedback to improve the quality and relevance of service delivery	Core

Competency C: Manage and resolve customer complaints	Core or Optional
PERFORMANCE CRITERIA	
1. Recognize potentials subjects of customer dissatisfaction and take preventative action to avoid escalation	Core
2. Maintain a positive and cooperative manner during all customer interactions	Core
3. Undertake appropriate action to implement and resolve customer requirements	Core
4. Where potentially difficult or abusive customers have been identified, take tactful action to prevent escalation of any problems, and ensure all interactions are thoroughly documented	Core
5. Follow organizational policies and procedures to respond to customer complaints, after first seeking to directly resolve in consultation with the customer	Core
6. Record outcome and assess effectiveness of resolution attempt according to work procedures	Core
7. Assess customer service provided and identify and report opportunities for improvement	Core

Job Function 8: Comply with laws, regulations, standards and policies

KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
Related Technical Instruction		
• Organizational policies and procedures • Key provisions of legislation that relate to own work role • Identify key provisions of relevant workplace health and safety acts, regulations and codes of practice that apply to the business and outline how they apply in the work area • Key aspects of consumer protection laws relevant to the selling of products and services • Definitions and interpretations commonly applied to contracts • Legal meanings of terms and clauses in sales contracts	• Workplace health and safety legislative and organizational requirements • Identifying, reporting and taking action on workplace health and safety hazards and risks • Reading skills to interpret: - legal text - schedules - contracts - reports - specifications • Communication skills appropriate to meet cultural differences • Numeracy skills to apply calculations • Written skills to prepare a contract • literacy skills to read and understand documents and publications	• Computer software applications • Computers • Email • Internet/extranet/intranet • Telephone systems, (including computer based systems) • Photocopiers/ printers • Scanners

Competency A: Identify and interpret key provisions of relevant legislation from all levels of government that affect business operations	Core or Optional
PERFORMANCE CRITERIA	
1. Identify and maintain register of current legislation, regulations and codes of practice relating to your industry	Optional
2. Ensure workplace health and safety policies and procedures are followed within your organization	Optional
3. Contribute to building workplace health and safety conscious culture	Core
4. Identify and report actions that might constitute breaches of legislation	Core

Job Function 9: Manage work priorities and professional development

Related Technical Instruction		
KNOWLEDGE	**SKILLS**	**TOOLS & TECHNOLOGIES**

• Describe goals, objectives or key performance indicators of own work role
• Explain the principles and techniques of goal setting, measuring performance, time management and personal assessment of learning and development needs
• Explain signs and sources of stress and strategies to deal with stress in the workplace
• Identify methods to identify and prioritize personal learning needs
• Explain principles and techniques involved in the management and organization of:
   – performance measurement
   – a personal development plan
   – a professional development plan
	• Self-management, planning and organizational skills
	• Technology skills to use systems and processes to organize and prioritize tasks and commitments
	• Networking skills
	• Writing skills to develop a personal development plan and an action plan
	• Literacy skills to read and understand the organization's procedures
	• Communication skills to give and receive constructive feedback relating to development needs
		• Computer applications specifically databases, CRM and SFA
		• Computers
		• Email
		• Internet/extranet/intranet
		• Telephone systems, (including computer based systems)
		• Personal schedulers
		• Photocopiers/ printers
		• Scanners

Competency A: Organize personal work priorities in accordance with organizational requirements	Core or Optional
PERFORMANCE CRITERIA	
1. Assess and prioritize workload to ensure tasks are completed within identified timeframes, in accordance with organizational requirements	Core
2. Identify potential factors which may affect the achievement of work objectives and develop and incorporate contingency strategies into work or service delivery plans	Core
3. Monitor own levels of stress and fatigue to ensure ability to work safely and sustainably	Core
4. Prioritize competing demands to achieve personal, team and organizational goals and objectives	Core

Competency B: Co-ordinate and manage personal skill development	Core or Optional
PERFORMANCE CRITERIA	
1. Establish short, medium and long-term personal work goals	Core
2. Identify, prioritize and plan professional development opportunities for personal skill development	Core
3. Co-ordinate and manage personal skill development activities	Core
4. Monitor and adjust personal work performance through self-assessment to ensure achievement of tasks	Core

Competency C: Develop and maintain professional competence	Core or Optional
PERFORMANCE CRITERIA	
1. Seek feedback to identify personal strengths and weaknesses against job requirements and determine professional development priorities and/or opportunities	Core
2. Identify opportunities to participate in activities which will facilitate the development of new industry-relevant skills	
3. Keep up-to-date with industry trends and developments	
4. Investigate membership of relevant industry associations	

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