



	Curriculum Document		
Curriculum Code	Curriculum Title		
243302-000-00-00	Health Products Sales Representative		
	Name	Email	Phone
Development Quality Partner	Chemical Industries Education & Training Authority (CHIETA)	qualifications@chieta.org.za	011 628 7000
			

Learner QDF Signature

Date

QDF Signature

Date

DQP Representative Signature

Date

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SECTION 1: CURRICULUM SUMMARY

1. Occupational Information

1.1 Associated Occupation

243302: Health Products Sales Representative

1.2 Occupation or Specialisation Addressed by this Curriculum

243302-000-00-00: Health Products Sales Representative

1.3 Alternative Titles used by Industry

- None

2. Curriculum Information

2.1 Curriculum Structure

This qualification is made up of the following compulsory Knowledge and Practical Skill Modules:

Knowledge Modules:

- 243302-000-00-00-KM-01, Anatomy and Physiology, NQF Level 5, Credits 15
- 243302-000-00-00-KM-02, Health Interventions, NQF Level 5, Credits 5
- 243302-000-00-00-KM-03, Legal Requirements and Ethics in the Pharmaceutical Industry, NQF Level 5, Credits 4
- 243302-000-00-00-KM-04, Ethical Codes of Practice relating to Health Products, NQF Level 5, Credits 1
- 243302-000-00-00-KM-05, Marketing Health Products, NQF Level 5, Credits 4
- 243302-000-00-00-KM-06, Sales of Health Products, NQF Level 5, Credits 5
- 243302-000-00-00-KM-07, Interpersonal and Intrapersonal Relationships and Communication, NQF Level 5, Credits 5
- 243302-000-00-00-KM-08, Events Planning and Presentation Skills, NQF Level 5, Credits 2

Total number of credits for Knowledge Modules: 41

Practical Skill Modules:

- 243302-000-00-00-PM-01, Define and Analyse Sales and Marketing Environment for Health Products, NQF Level 5, Credits 6
- 243302-000-00-00-PM-02, Manage Customer Databases and Relationships, NQF Level 5, Credits 4
- 243302-000-00-00-PM-03, Apply Product and Other Relevant Knowledge in order to Prepare for Health products Sales, NQF Level 5, Credits 14
- 243302-000-00-00-PM-04, Sell Health Products to Achieve Targets, NQF Level 5, Credits 8
- 243302-000-00-00-PM-05, Plan Events and Present Information on Health Products, NQF Level 5, Credits 4

Total number of credits for Practical Skill Modules: 36

This qualification also requires the following Work Experience Modules:

- 243302-000-00-00-WM-01, Health Products Sales and Marketing Environment Analysis, NQF Level 5, Credits 4
- 243302-000-00-00-WM-02, Customer Databases and Relationships Maintenance and Building, NQF Level 5, Credits 16
- 243302-000-00-00-WM-03, Health Products Sales, NQF Level 5, Credits 60
- 243302-000-00-00-WM-04, Events and Presentations, NQF Level 5, Credits 6
- 243302-000-00-00-WM-05, Induction and Company Policy, Procedures and Product Specific Training, NQF Level 5, Credits 10

Total number of credits for Work Experience Modules: 96

2.2 Entry Requirements

- NQF Level 4

Or

- 3 years' experience in the health products industry.

3. Assessment Quality Partner Information

Name of body: Chemical Industries Education & Training Authority (CHIETA)

Address of body: 2 Clamart Road, Richmond, Johannesburg

Contact person name: Ms T Magonare

Contact person work telephone number: 0116287000

4. Part Qualification Curriculum Structure

Curriculum Code	Title	NQF Level	Credits
243302-000-00-01	Health Products Marketing Associate	5	45
243302-000-00-02	Health Products Information Officer	5	59
243302-000-00-03	Health Products Sales Associate	5	78

PART QUALIFICATION 1

TITLE

SAQA Qual ID 243302-000-00-01, Health Products Marketing Associate, NQF Level 5, Credits 92

PURPOSE

The purpose of this qualification is to prepare a learner to operate as a Health Products Marketing Associate.

A Health Products Marketing Associate represents companies promoting health products. A competent learner shall demonstrate among others the following attributes: honesty, integrity, punctuality, business acumen, self-motivated, responsibility, accountability, interpersonal relations, ethical behaviour, well organised, self-confidence, etc.

RULES OF COMBINATION

This qualification is made up of the following compulsory Knowledge, Practical Skills and Work Experience Modules:

Knowledge Modules

- 243302-000-00-KM-01 Anatomy and Physiology, NQF level 5, Credits 15
- 243302-000-00-KM-02 Health Interventions, NQF level 5, Credits 5
- 243302-000-00-KM-03 Legal Requirements and Ethics in the Pharmaceutical Industry, NQF level 5, Credits 4
- 243302-000-00-KM-04 Ethical Codes of Practice relating to Health Products, NQF level 5, Credits 1
- 243302-000-00-KM-05 Marketing Health Products, NQF level 5, Credits 4
- 243302-000-00-KM-07 Interpersonal and Intrapersonal Relationships and Communication, NQF level 5, Credits 5
- 243302-000-00-KM-08 Events Planning and Presentation Skills, NQF level 5, Credits 2

Total number of credits for **Knowledge Modules: 36**

Practical Skill Modules

- 243302-000-00-PM-01 Define and Analyse Sales and Marketing Environment for Health Products, NQF level 5, Credits 6
- 243302-000-00-PM-03 Apply Product and Other Relevant Knowledge during Health Products Sales, NQF level 5, Credits 14
- 243302-000-00-PM-05 Plan Events and Present Information on Health Products, NQF level 5, Credits 4

Total number of credits for **Practical Skill Modules: 24**

Work Experience Modules

- 243302-000-00-WM-02 Customer Databases and Relationships Maintenance and Building, NQF level 5, Credits 16
- 243302-000-00-WM-04 Events and Presentations, NQF level 5, Credits 6

- 243302-000-00-WM-05 Induction and Company Policy Procedures and Product Specific Training, NQF level 5, Credits 10

Total number of credits for **Work Experience Modules: 32**

ENTRY REQUIREMENTS

- NQF Level 4

PART QUALIFICATION 2

TITLE

SAQA Qual ID 243302-000-00-02, Health Products Information Officer, NQF Level 5, Credits 77

PURPOSE

The purpose of this qualification is to prepare a learner to operate as Health Products Information Officer.

The Health Products Information Officer supports the medical advisory and/or product specialist team and/or regulatory compliance team to research, collate, analyse and represent information related to health products that the company sells and/or health products that are deemed competitor products. In addition, the Health Products Information Officer will provide informational support and manage the safety profile of assigned health products. A competent learner shall demonstrate among others the following attributes: honesty, integrity, punctuality, business acumen, self-motivated, responsibility, accountability, interpersonal relations, ethical behaviour, well organised, self-confidence, etc.

RULES OF COMBINATION

This qualification is made up of the following compulsory Knowledge, Practical Skills and Work Experience Modules:

Knowledge Modules

- 243302-000-00-KM-01 Anatomy and Physiology, NQF Level 5, Credits 15
- 243302-000-00-KM-02 Health Interventions, NQF Level 5, Credits 5
- 243302-000-00-KM-03 Legal Requirements and Ethics in the Pharmaceutical Industry, NQF Level 5, Credits 4
- 243302-000-00-KM-04 Ethical Codes of Practice relating to Health Products, NQF Level 5, Credits 1
- 243302-000-00-KM-06 Sales of Health Products, NQF Level 5, Credits 5
- 243302-000-00-KM-07 Interpersonal and Intrapersonal Relationships and Communication, NQF Level 5, Credits 5

Total number of credits for **Knowledge Modules: 35**

Practical Skill Modules

- 243302-000-00-PM-03 Apply Product and Other Relevant Knowledge in order to Prepare for Health Products Sales, NQF Level 5, Credits 14
- 243302-000-00-PM-04 Sell Health Products to Achieve Targets, NQF Level 5, Credits 8
- 243302-000-00-PM-05 Plan Events and Present Information on Health Products, NQF Level 5, Credits 4

Total number of credits for **Practical Skill Modules: 26**

Work Experience Modules

- 243302-000-00-WM-04 Events and Presentations, NQF Level 5, Credits 6
- 243302-000-00-WM-05 Induction and Company Policy Procedures and Product Specific Training, NQF Level 5, Credits 10

Total number of credits for **Work Experience Modules: 16**

ENTRY REQUIREMENTS

- NQF Level 4

PART QUALIFICATION 3

TITLE

SAQA Qual ID 243302-000-00-03, Health Products Sales Associate, NQF Level 5, Credits 112

PURPOSE

The purpose of this qualification is to prepare a learner to operate as Health Products Sales Associate.

The Health Products Sales Associate supports the Health Products Sales Representative and/or key accounts managers and/or Sales Managers in all sales and marketing activities. They are involved in identifying prospects, qualifying them, arranging introductions and meetings for Health Products Sales Representatives. The Health Products Sales Associate assists in maintaining current accounts and business expansion via marketing channels by employing various sales and marketing techniques such targeted emails and blasts calls, etc. A competent learner shall demonstrate among others the following attributes: honesty, integrity, punctuality, business acumen, self-motivated, responsibility, accountability, interpersonal relations, ethical behaviour, well organised, self-confidence, etc.

RULES OF COMBINATION

This qualification is made up of the following compulsory Knowledge, Practical Skills and Work Experience Modules:

Knowledge Modules

- 243302-000-00-KM-01 Anatomy and Physiology NQF Level 5, Credits 15
- 243302-000-00-KM-03 Legal Requirements and Ethics in the Pharmaceutical Industry NQF Level 5, Credits 4
- 243302-000-00-KM-04 Ethical Codes of Practice relating to Health Products NQF Level 5, Credits 1
- 243302-000-00-KM-06 Sales of Health Products NQF Level 5, Credits 5
- 243302-000-00-KM-07 Interpersonal and Intrapersonal Relationships and Communication NQF Level 5, Credits 5

Total number of credits for Knowledge Modules: **30**

Practical Skill Modules

- 243302-000-00-PM-03 Apply Product and Other Relevant Knowledge in order to Prepare for Health Products Sales, NQF Level 5, Credits 14
- 243302-000-00-PM-04 Sell Health Products to Achieve Targets, NQF Level 5, Credits 8

Total number of credits for Practical Skill Modules: **22**

Work Experience Modules

- 243302-000-00-WM-03 Health products Sales, NQF Level 5, Credits 60

Total number of credits for Work Experience Modules: **60**

ENTRY REQUIREMENTS

- NQF Level 4

SECTION 2: OCCUPATIONAL PROFILE

1. Occupational Purpose

The purpose of this qualification is to prepare a learner to operate as a Health Products Sales Representative.

A Health Products Sales Representative represents companies in selling and promoting health products.

2. Occupational Tasks

- Investigate global and local sales and marketing environment to achieve health products sales objectives. (NQF Level 5)
- Maintain and build customer databases and relationships. (NQF Level 5)
- Sell health products and services whilst complying with prevailing legislation. (NQF Level 5)
- Promote health products and educate customers. (NQF Level 5)

3. Occupational Task Details

3.1. Investigate global and local sales and marketing environment to achieve health products sales objectives. (NQF Level 5)

Unique Product or Service:

- Global and local sales and marketing information available

Occupational Responsibilities:

- Define and Analyse Sales and Marketing Environment for Health Products

Occupational Contexts:

- Health Products Sales and Marketing Environment Analysis

3.2. Maintain and build customer databases and relationships. (NQF Level 5)

Unique Product or Service:

- Customer databases and relationships

Occupational Responsibilities:

- Manage Customer Databases and Relationships

Occupational Contexts:

- Customer Databases and Relationships Building and Maintenance

3.3. Sell health products and services whilst complying with prevailing legislation. (NQF Level 6)

Unique Product or Service:

- Health products and services sales

Occupational Responsibilities:

- Apply Product and Other Relevant Knowledge during Health Products Sales
- Sell Health Products to Achieve Targets

Occupational Contexts:

- Health Products Sales
- Induction and Company Policy, Procedures and Product Specific Training

3.4. Promote health products and educate customers. (NQF Level 5)

Unique Product or Service:

- Health products promotion

Occupational Responsibilities:

- Plan Events and Present Information on Health Products

Occupational Contexts:

- Events and Presentations

SECTION 3: CURRICULUM COMPONENT SPECIFICATIONS

SECTION 3A: KNOWLEDGE MODULE SPECIFICATIONS

List of Knowledge Modules for which Specifications are included

- 243302-000-00-00-KM-01, Anatomy and Physiology, NQF Level 5, Credits 15
- 243302-000-00-00-KM-02, Health Interventions, NQF Level 5, Credits 5
- 243302-000-00-00-KM-03, Legal Requirements and Ethics in the Pharmaceutical Industry, NQF Level 5, Credits 4
- 243302-000-00-00-KM-04, Ethical Codes of Practice relating to Health Products, NQF Level 5, Credits 1
- 243302-000-00-00-KM-05, Marketing Health Products, NQF Level 5, Credits 4
- 243302-000-00-00-KM-06, Sales of Health Products, NQF Level 5, Credits 5
- 243302-000-00-00-KM-07, Interpersonal and Intrapersonal Relationships and Communication, NQF Level 5, Credits 5
- 243302-000-00-00-KM-08, Events Planning and Presentation Skills, NQF Level 5, Credits 2

1. 243302-000-00-00-KM-01, Anatomy and Physiology, NQF Level 5, Credits 15

1.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the human anatomy, physiology and pathophysiology and the therapeutic treatment options available

The learning will enable learners to demonstrate an understanding of:

- KM-01-KT01: Cardiovascular system (9%)
- KM-01-KT02: Urinary and renal system (9%)
- KM-01-KT03: Respiratory system (9%)
- KM-01-KT04: Nervous system (9%)
- KM-01-KT05: Musculoskeletal system (9%)
- KM-01-KT06: Gastro-intestinal system (9%)
- KM-01-KT07: Endocrine system (9%)
- KM-01-KT08: Lymphatic and immune system and haematology (9%)
- KM-01-KT09: Reproductive system (male and female) (10%)
- KM-01-KT10: Skin (9%)
- KM-01-KT11: Special senses (9%)

1.2 Guidelines for Topics

1.2.1. KM-01-KT01: Cardiovascular system (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: hypertension, cardiac failure, oedema, ischaemic heart disease angina, dyslipidaemia, emboli, thrombi, atherosclerosis
- Diagnostic tools

Internal Assessment Criteria and Weight

- The structure and function of the systems of the body are described and explained (25%)
- The pathophysiology of specific conditions is identified and assessed (25%)
- Microbiology as it relates to common conditions is discussed (25%)
- Therapeutic options used for the management of specific conditions are differentiated (25%)

(Weight 9%)

1.2.2. KM-01-KT02: Urinary and renal system (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: renal failure, nephritis, urinary tract infections, renal calculi, urinary incontinence, urinary retention and frequency
- Diagnostic tools

Internal Assessment Criteria and Weight

- The structure and function of the systems of the body are described and explained (25%)
- The pathophysiology of specific conditions is identified and assessed (25%)
- Microbiology as it relates to common conditions is discussed (25%)
- Therapeutic options used for the management of specific conditions are differentiated (25%)

(Weight 9%)

1.2.3. KM-01-KT03: Respiratory system (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: upper respiratory tract infections, sinusitis, allergic rhinitis, influenza, bronchitis (acute and chronic), pneumonia, chronic obstructive airways disease, asthma, tuberculosis, malignancies, pleural effusion, acute respiratory failure
- Diagnostic tools

Internal Assessment Criteria and Weight

- The structure and function of the systems of the body are described and explained (25%)
- The pathophysiology of specific conditions is identified and assessed (25%)
- Microbiology as it relates to common conditions is discussed (25%)
- Therapeutic options used for the management of specific conditions are differentiated (25%)

(Weight 9%)

1.2.4. KM-01-KT04: Nervous system (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: cerebrovascular accident, malignancies, raised intracranial pressure, Parkinson's disease, dementias, neuropathies, depression, anxiety, insomnia, psychoses, pain and pain management
- Applied pharmacology and therapeutic approaches to common conditions
- Diagnostic tools

Internal Assessment Criteria and Weight

- Applied pharmacology and therapeutic approaches are applied to common conditions (20%)
- The structure and function of the systems of the body are described and explained (20%)
- The pathophysiology of specific conditions is identified and assessed (20%)
- Microbiology as it relates to common conditions is discussed (20%)
- Therapeutic options used for the management of specific conditions are differentiated (20%)

(Weight 9%)

1.2.5. KM-01-KT05: Musculoskeletal system (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: osteoporosis, osteoarthritis, rheumatoid arthritis, inflammatory and degenerative conditions, tetanus
- Applied pharmacology and therapeutic approaches to common conditions
- Diagnostic tools

Internal Assessment Criteria and Weight

- Applied pharmacology and therapeutic approaches are applied to common conditions (20%)
- The structure and function of the systems of the body are described and explained (20%)
- The pathophysiology of specific conditions is identified and assessed (20%)
- Microbiology as it relates to common conditions is discussed (20%)
- Therapeutic options used for the management of specific conditions are differentiated (20%)

(Weight 9%)

1.2.6. KM-01-KT06: Gastro-intestinal system (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: halitosis, vomiting, diarrhoea, constipation, irritable bowel syndrome, gastro-oesophageal reflux, peptic ulcers, malignancies, helminthic infestations, malnutrition, pancreatitis, hepatitis, Crohn's disease, ulcerative colitis, malignancies, cholecystitis, haemorrhoids, infectious diseases
- Applied pharmacology and therapeutic approaches to common conditions
- Diagnostic tools

Internal Assessment Criteria and Weight

- Applied pharmacology and therapeutic approaches are applied to common conditions (20%)
- The structure and function of the systems of the body are described and explained (20%)
- The pathophysiology of specific conditions is identified and assessed (20%)
- Microbiology as it relates to common conditions is discussed (20%)
- Therapeutic options used for the management of specific conditions are differentiated (20%)

1.2.7. KM-01-KT07: Endocrine system (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: diabetes mellitus, metabolic syndrome, hyperthyroidism, hypothyroidism, Cushing's syndrome
- Terminology
- Applied pharmacology and therapeutic approaches to common conditions
- Diagnostic tools

Internal Assessment Criteria and Weight

- Applied pharmacology and therapeutic approaches are applied to common conditions (20%)
- The structure and function of the systems of the body are described and explained (20%)
- The pathophysiology of specific conditions is identified and assessed (20%)

- Microbiology as it relates to common conditions is discussed (20%)
- Therapeutic options used for the management of specific conditions are differentiated (20%)

(Weight 9%)

1.2.8. KM-01-KT08: Lymphatic and immune system and haematology (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: lymphadenopathy, malignancies, HIV and AIDS, infectious diseases, anaemia, leukaemia, auto-immune disorders,
- Applied pharmacology and therapeutic approaches to common conditions
- Diagnostic tools

Internal Assessment Criteria and Weight

- Applied pharmacology and therapeutic approaches are applied to common conditions (20%)
- The structure and function of the systems of the body are described and explained (20%)
- The pathophysiology of specific conditions is identified and assessed (20%)
- Microbiology as it relates to common conditions is discussed (20%)
- Therapeutic options used for the management of specific conditions are differentiated (20%)

(Weight 9%)

1.2.9. KM-01-KT09: Reproductive system (male and female) (10%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: sexually transmitted infections, benign prostatic hypertrophy, infertility, contraception, hormonal imbalance, erectile dysfunction, malignancies
- Applied pharmacology and therapeutic approaches to common conditions
- Diagnostic tools

Internal Assessment Criteria and Weight

- Applied pharmacology and therapeutic approaches are applied to common conditions (20%)

- The structure and function of the systems of the body are described and explained (20%)
- The pathophysiology of specific conditions is identified and assessed (20%)
- Microbiology as it relates to common conditions is discussed (20%)
- Therapeutic options used for the management of specific conditions are differentiated (20%)

(Weight 10%)

1.2.10. KM-01-KT10: Skin (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: impetigo, ulceration, tumours, acne, dermatitis, allergic reactions, infectious conditions, tinea, psoriasis, eczema
- Applied pharmacology and therapeutic approaches to common conditions
- Diagnostic tools

Internal Assessment Criteria and Weight

- Applied pharmacology and therapeutic approaches are applied to common conditions (20%)
- The structure and function of the systems of the body are described and explained (20%)
- The pathophysiology of specific conditions is identified and assessed (20%)
- Microbiology as it relates to common conditions is discussed (20%)
- Therapeutic options used for the management of specific conditions are differentiated (20%)

(Weight 9%)

1.2.11. KM-01-KT11: Special senses (9%)

Topic elements to be covered include:

- Terminology
- Anatomy
- Physiology
- Pathophysiology including, but not limited to: glaucoma, conjunctivitis, otitis media, hearing disorders, sinusitis
- Applied pharmacology and therapeutic approaches to common conditions
- Diagnostic tools

Internal Assessment Criteria and Weight

- Applied pharmacology and therapeutic approaches are applied to common conditions (20%)
- The structure and function of the systems of the body are described and explained (20%)
- The pathophysiology of specific conditions is identified and assessed (20%)
- Microbiology as it relates to common conditions is discussed (20%)
- Therapeutic options used for the management of specific conditions are differentiated (20%)

(Weight 9%)

1.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Lesson Plans
- Learning Material

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- N/A

1.4 Exemptions

- No exemptions but the course can be completed in full through the RPL process

2. 243302-000-00-00-KM-02, Health Interventions, NQF Level 5, Credits 5

2.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of health products, IVDs and devices and their appropriate uses

The learning will enable learners to demonstrate an understanding of:

- KM-02-KT01: Manufacturing of health products, IVDs and devices (15%)
- KM-02-KT02: Utilisation of pharmacology to provide information about medicines and their appropriate use (20%)
- KM-02-KT03: Utilisation of pharmaceuticals to provide information about medicines and their appropriate use (20%)
- KM-02-KT04: Medical devices and diagnostic interventions (15%)
- KM-02-KT05: Complementary medicine and supplementary interventions (15%)
- KM-02-KT06: Medical consumables (15%)

2.2 Guidelines for Topics

2.2.1. KM-02-KT01: Manufacturing of health products, IVDs and devices (15%)

Topic elements to be covered include:

- Animal sources
- Synthetics
- Genetic production
- Generics, biosimilars and clones
- Cultural diversity regarding formulation (such as vegan & pork restrictions)
- Good manufacturing practices (GMP)
- Applicable ISO standards

Internal Assessment Criteria and Weight

- The manufacturing of health products, IVDs and devices is analysed in terms of types, cultural diversity and national and international standards (100%)

(Weight 15%)

2.2.2. KM-02-KT02: Utilisation of pharmacology to provide information about medicines and their appropriate use (20%)

Topic elements to be covered include:

- Principles of pharmacokinetics and pharmacodynamics
- Influence of pharmaceuticals and the effects of medicines in the body
- Safety of medicines in patient care and pharmacovigilance

- Relevant current pharmaceutical and health legislation
- Patient information leaflets and package inserts
- Relevant current information systems and resources

Internal Assessment Criteria and Weight

- The absorption, distribution, metabolism and excretion of medicines in the human body (pharmacokinetics) are described. Effects include but are not limited to therapeutic, undesired and adverse effects (20%)
- The effects of medicines on the systems and organs of the body (pharmacodynamics) are described (20%)
- The therapeutic classification of medicines is described to match action with treatment objectives. Officially recognised systems of therapeutic classification are utilised (20%)
- Interactions and the safety of medicines are described in accordance with current regulatory requirements and available information (10%)
- The regulatory requirements relating to the reporting of adverse reactions to medicines and vigilance are explained (10%)
- Actions to be taken in the event of a medicine recall in order to ensure effective communication and implementation are explained (10%)
- Methods to ensure effective pharmaceutical products supply and storage are described in terms of product integrity, including relevant regulation, schedules, quality assurance, documentary requirements and storage (10%)

(Weight 20%)

2.2.3. KM-02-KT03: Utilisation of pharmaceuticals to provide information about medicines and their appropriate use (20%)

Topic elements to be covered include:

- Product characteristics
- Dosage forms
- Critical aspects
- Quality assurance
- Relevant current pharmaceutical and health legislation

Internal Assessment Criteria and Weight

- Pharmaceutical factors which affect the delivery and action of a medicine in the body are identified and described so that an appropriate dosage form may be selected. Factors include but are not limited to the use of excipients, coatings and vehicles (50%)
- Possible dosage forms and routes of administration are described in terms of desired therapeutic outcomes (50%)

(Weight 20%)

2.2.4. KM-02-KT04: Medical devices and diagnostic interventions (15%)

Topic elements to be covered include:

- Terminology
- Overview of health technologies
- Types and uses
- Classification of devices and diagnostic interventions
- Registration
- Manufacturing, importation and distribution of health technologies
- Unique device identifier
- Health technology assessment
- Critical aspects
- Quality assurance
- Quality and safety regulations
- Risks and benefits

Internal Assessment Criteria and Weight

- Uses and benefits of own product in relation to competitor products and approaches are compared and contrasted (50%)
- A product is described according to the promotional plan of the company (50%)

(Weight 15%)

2.2.5. KM-02-KT05: Complementary medicine and supplementary interventions (15%)

Topic elements to be covered include:

- Terminology
- Overview
- Classification of approaches
- Registration and legislation
- Product characteristics
- Dosage forms
- Drug interactions
- Critical aspects
- Quality assurance
- Risks and benefits

- Evidence based support

Internal Assessment Criteria and Weight

- Uses and benefits of own product in relation to competitor products and approaches are compared and contrasted (50%)
- A product is described according to the promotional plan of the company (50%)

(Weight 15%)

2.2.6. KM-02-KT06: Medical consumables (15%)

Topic elements to be covered include:

- Terminology
- Classification of products
- Registration and legislation
- Types and uses
- Risks and benefits
- Categories
- Critical aspects
- Quality assurance
- Source of manufacture
- Distribution

Internal Assessment Criteria and Weight

- Uses and benefits of own product in relation to competitor products and approaches are compared and contrasted (50%)
- A product is described according to the promotional plan of the company (50%)

(Weight 15%)

2.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Lesson Plans
- Learning Material

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience

- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- N/A

2.4 Exemptions

- No exemptions but the course can be completed in full through the RPL process

3. 243302-000-00-00-KM-03, Legal Requirements and Ethics in the Pharmaceutical Industry, NQF Level 5, Credits 4

3.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the legal requirements and ethics applicable to the marketing and selling of health products and the implications of non-compliance

The learning will enable learners to demonstrate an understanding of:

- KM-03-KT01: Managed health care (35%)
- KM-03-KT02: Legislation pertaining to health products (35%)
- KM-03-KT03: Pharmacovigilance (30%)

3.2 Guidelines for Topics

3.2.1. KM-03-KT01: Managed health care (35%)

Topic elements to be covered include:

- Development of the South African health care environment
- Principles of health care funding
- Effects of public policy and legislation
- Past, present and possible future developments
- Current relevant and proposed legislation
- Patient benefit options

Internal Assessment Criteria and Weight (35%)

- The effects of public policy and legislation as they impact on the South African health care environment are explained (20%)
- The private health care market is described in terms of past, present and possible future developments (20%)
- The public and uninsured health care market is described in terms of past, present and possible future developments (Includes but is not limited to the State, National Health Insurance) (20%)
- The current relevant legislation governing health care funding is described in terms of its impact on access to medicines. Includes but is not limited to Prescribed Minimum Benefits, chronic disease lists, treatment algorithms, Risk Equalisation Fund, designated service providers, formularies, co-payments, medicine (drug) utilisation review, essential medicine (drug) lists, and tenders (20%)
- Patient benefit options are demonstrated during the sales dialogue with clients (20%)

(Weight 35%)

3.2.2. KM-03-KT02: Legislation pertaining to health products (35%)

Topic elements to be covered include:

- Specific legislation pertaining to health products and relevant nutrition

- Concept, definitions and terminology
- Registration pertaining to healthcare products
- Regulatory body and industry structures
- The role of scheduling with respect to where product may be sold and prescription controls
- Complaints and recall processes
- Reporting of side effects (procedure)
- Drug recalls and classes of recall

Internal Assessment Criteria and Weight

- The implication of legislation and codes relating to healthcare products and nutrition, including infant formulae, is explained as it refers to promotion of health products (100%)

(Weight 35%)

3.2.3. KM-03-KT03: Pharmacovigilance (30%)

Topic elements to be covered include:

- Concept, definitions and terminology
- Global practice and requirements
- Accountability and responsibilities
- Complaints and recalls
- Noting the safety of drugs
- The role of the responsible pharmacist and/or regulatory officer

Internal Assessment Criteria and Weight

- Implementation of pharmacovigilance principles is explained and identified (50%)
- Implications of non-compliance to pharmacovigilance requirements are understood (50%)

(Weight 30%)

3.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Lesson Plans
- Learning Material

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- N/A

3.4 Exemptions

- No exemptions but the course can be completed in full through the RPL process

4. 243302-000-00-00-KM-04, Ethical Codes of Practice relating to Health Products, NQF Level 5, Credits 1

4.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the legal requirements and ethics applicable to the marketing and selling of health products and the implications of non-compliance

The learning will enable learners to demonstrate an understanding of:

- KM-04-KT01: Codes of practice (50%)
- KM-04-KT02: Ethical behaviour (50%)

4.2 Guidelines for Topics

4.2.1. KM-04-KT01: Codes of practice (50%)

Topic elements to be covered include:

- The SA Code of Marketing Practice and its Guidelines
- Medical Device Code of Ethical Business and Marketing Practice

Internal Assessment Criteria and Weight

- Discussions with regard to any patient's condition are limited to relevant parties, with the consent of the patient or guardian, as applicable (50%)
- The consequences of breaking confidentiality, with reference to disciplinary policies and bodies, are explained (50%)

(Weight 50%)

4.2.2. KM-04-KT02: Ethical behaviour (50%)

Topic elements to be covered include:

- Models of ethical decision making
- Ethical behaviour
- Customer confidentiality
- Self-development as a professional person
- Protecting customer rights

Internal Assessment Criteria and Weight

- Customer rights are consistently protected and promoted by own actions (50%)
- Conflicting loyalties are identified and resolved in terms of professional ethical values and codes of ethics (25%)
- Professional requirements are referred timeously and appropriately when conflicted by own principles (25%)

(Weight 50%)

4.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Lesson Plans
- Learning Material

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- N/A

4.4 Exemptions

- No exemptions but the course can be completed in full through the RPL process

5. 243302-000-00-00-KM-05, Marketing Health Products, NQF Level 5, Credits 4

5.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of marketing principles applicable to equipment and supplies, and nutraceutical, pharmaceutical and medical products

The learning will enable learners to demonstrate an understanding of:

- KM-05-KT01: Marketing Principles (basic) (30%)
- KM-05-KT02: Scientific studies/Clinical trials (basics of) (30%)
- KM-05-KT03: Application of principles of pharmacoeconomics to clinical study outcomes (40%)

5.2 Guidelines for Topics

5.2.1. KM-05-KT01: Marketing Principles (basic) (30%)

Topic elements to be covered include:

- Understand principles of marketing
- Market analysis and market segmentation
- Relevant data sources
- Marketing plan
- Implementation of marketing objectives
- Documentation and presentation of data

Internal Assessment Criteria and Weight

- One or more models for marketing principles, e.g. 7 P's of marketing mix which are product, price, people, promotion, place, physical evidence and process is understood (20%)
- The way to qualitatively and quantitatively analyse the market and market trends to apply segmentation strategies in order to identify potential business opportunities and set appropriate marketing objectives, e.g. surveys, internet research etc., is understood (20%)
- The way to identify and use relevant data resources that is what and how, is understood (10%)
- The ability to design a marketing campaign and appropriate media to represent information is demonstrated (20%)
- The understanding of what a marketing plan is and how to implement it, is demonstrated (10%)
- The process for implementation of marketing plan to meet marketing objectives is understood (10%)

(Weight 30%)

5.2.2. KM-05-KT02: Scientific studies/Clinical trials (basics of) (30%)

Topic elements to be covered include:

- Principles of clinical research methodology
- Evidence based medicine

- Interpretation of clinical study results and reports
- Accurate and ethical paraphrasing of clinical study results

Internal Assessment Criteria and Weight

- Clinical studies are described in terms of their purpose and principles in order to demonstrate the effective, safe and appropriate use of the particular product (20%)
- Clinical studies are described according to the context in which they are carried out (20%)
- The methods used for the analysing of clinical study results are explained in order to identify a method appropriate for given circumstances (20%)
- The identified method for analysis is used to interpret the results of the specific study and suitable methods for given circumstances are identified (20%)
- The outcomes of the analysis are used to design a strategy which highlights the specific advantages of the given product in a fair and ethical way (20%)

(Weight 30%)

5.2.3. KM-05-KT03: Application of principles of pharmacoeconomics to clinical study outcomes (30%)

Topic elements to be covered include:

- Theory of pharmacoeconomic analysis
- Method of pharmacoeconomic analysis for specific clinical trial results
- Cost-effectiveness of medicines and the cost-effectiveness of specific treatment modalities
- Medicines pricing controls and SEP
- Legislation on discounting and bonusing (Medicines Act) also applies to devices
- Legislation on sampling and carrying samples

Internal Assessment Criteria and Weight

- Pharmacoeconomic terms are listed and defined (20%)
- Concepts and principles of pharmacoeconomics are discussed to ensure an understanding of the various methods used. The principles of pharmacoeconomics include but are not limited to cost-effectiveness, pharmaceutical products, characteristics and stakeholders (20%)
- Methods of pharmacoeconomic analysis are described to enable the identification of an appropriate method for a specific study (20%)
- A suitable method of pharmacoeconomic analysis is identified for specific clinical study results (10%)
- The identified method of pharmacoeconomic analysis is applied to the specific clinical study results to demonstrate cost effectiveness of the pharmaceutical product (10%)
- The differences between the cost-effectiveness of various medicines are explained to support a recommendation for the use of a product (10%)

- The differences between the cost-effectiveness of specific treatment modalities are explained to support a recommendation for use (10%)

(Weight 40%)

5.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Lesson Plans
- Learning Material

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- N/A

5.4 Exemptions

- No exemptions but the course can be completed in full through the RPL process

6. 243302-000-00-00-KM-06, Sales of Health Products, NQF Level 5, Credits 5

6.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of selling and territory management principles applicable to nutraceutical, pharmaceutical and medical equipment, supplies and products

The learning will enable learners to demonstrate an understanding of:

- KM-06-KT01: Situational analysis and territory management (20%)
- KM-06-KT02: Sales in the healthcare environment (10%)
- KM-06-KT03: A comprehensive understanding of selling principles (20%)
- KM-06-KT04: Selling methods and techniques (20%)
- KM-06-KT05: Follow-up processes (20%)
- KM-06-KT06: Merchandising and displays (10%)

6.2 Guidelines for Topics

6.2.1. KM-06-KT01: Situational analysis and territory management (20%)

Topic elements to be covered include:

- A broad understanding of principles, methods and techniques for conducting sales situational analyses
- A broad and integrated understanding of methods and techniques for analysing data from sales situational analyses
- Target groups and target group analysis
- Competitor information and analysis
- Access to market information

Internal Assessment Criteria and Weight

- The application of the analysis to draw up and manage an annual, cycle and daily plan based on required call rate and frequency is understood (100%)

6.2.2. KM-06-KT02: Sales in the healthcare environment (10%)

Topic elements to be covered include:

- Overview of the healthcare industry
- Stakeholders
- Differences and similarities in different sales situations such as medical practitioner sales, pharmacy sales, theatre sales, OTC, chain pharmacies (eg Dischem, Clicks)
- The use of principles of interactive styles to apply flexing in the sales call

Internal Assessment Criteria and Weight

- Types of markets, companies and customers are analysed based on characteristics (35%)
- The activities of a health products sales representative in each situation are understood and described (30%)
- Methods to adjust a sales call to personality of customer are evaluated and justified (35%)

(Weight 10%)

6.2.3. KM-06-KT03: A comprehensive understanding of selling principles (20%)

Topic elements to be covered include:

- The Sales Cycle
- Selection of information and/or materials
- Identifying and addressing customer needs
- Understanding the distributions chain of different health products

Internal Assessment Criteria and Weight

- The role of sales activities in the sales cycle, from creating awareness to committed use, is evaluated (15%)
- The importance of setting pre-call SMART call objectives for customers in order to achieve sales targets is reasoned (16%)
- The importance of selecting all support required for call is reasoned (18%)
- Questioning as a method to identify customer needs is evaluated (18%)
- Presenting features and benefits relevant to needs as a sales technique is evaluated (18%)
- Information on how the customer will access the products is explained (15%)

(Weight 20%)

6.2.4. KM-06-KT04: Selling methods and techniques (20%)

Topic elements to be covered include:

- Call objectives
- Presentation of information
- Listening
- Observing
- Questioning
- Objection handling
- Closing the sale (estimations and quotation)
- Post-call reporting

Internal Assessment Criteria and Weight

- Appropriate body and voice to demonstrate listening and questioning, observation and appropriate interjection, is shown (15%)
- One or more appropriate methodologies to handle objections, e.g. feel, felt, found, is understood (15%)
- Style flexing techniques used to build rapport in order to influence the customer, are defined (12%)
- Progress of discussion during call, in line with call objective, is monitored and confirmed if call objective is met (12%)
- The methods to input data into appropriate channels and to make use of available data to influence sales, are understood (12%)
- Principles related to the use of probing, questioning and building rapport are analysed for most applicable to the situation (12%)
- Features are analysed to present benefits with emphasis through use of voice and body language ensuring that customer specific needs are addressed (12%)
- Closing sale: ability to monitor progress of discussion is demonstrated (12%)

(Weight 20%)

6.2.5. KM-06-KT05: Follow-up processes (20%)

Topic elements to be covered include:

- Monitoring sales data
- Taking and processing orders
- Service such as follow post call, follow-up action e.g. respond to queries etc.

Internal Assessment Criteria and Weight

- General principles to process orders are understood (50%)
- Knowledge on how to utilise available resources to address customer queries that may arise during the call, is demonstrated (50%)

(Weight 20%)

6.2.6. KM-06-KT06: Merchandising and displays (10%)

Topic elements to be covered include:

- Merchandising principles and requirements
- Planograms/wire diagrams: aim and use
- Displays: types, functions, instructions and signage
- Replenishment: calculations
- Shrinkage: causes and preventative measures
- Cross-merchandising

Internal Assessment Criteria and Weight

- Basic principles of good store design are understood and explained (25%)
- The purpose of planograms is analysed with reference to allocation of shelf space, position on shelf, number of shelf facings and hot spots (25%)
- The purpose of shelf talkers, gondola ends, window displays and principles of good display is analysed (25%)
- The application of cross merchandising, upselling and add-on products to company products is analysed (25%)

(Weight 10%)

6.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Lesson Plans
- Learning Material

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- N/A

6.4 Exemptions

- No exemptions but the course can be completed in full through the RPL process

7. 243302-000-00-00-KM-07, Interpersonal and Intrapersonal Relationships and Communication, NQF Level 5, Credits 5

7.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of client management principles applicable to health products, equipment and supplies

The learning will enable learners to demonstrate an understanding of:

- KM-07-KT01: Client relationships (40%)
- KM-07-KT02: Protocols and cultural awareness (40%)
- KM-07-KT03: Professional skills and development (20%)

7.2 Guidelines for Topics

7.2.1. KM-07-KT01: Client relationships (40%)

Topic elements to be covered include:

- Typical client characteristics
- Interactive styles in managing interactions with people in different situations
- Basic principles of a client centred relationship
- Application of a selected behaviour/interactive style model to a specific client relationship

Internal Assessment Criteria and Weight

- The concept of client relationships is explained, using correct terminology (35%)
- The basic principles of client centred relationships are justified (35%)
- Aspects of selected behaviour/interactive style model are analysed in terms of applicability to different clients and situations (30%)

(Weight 40%)

7.2.2. KM-07-KT02: Protocols and cultural awareness (40%)

Topic elements to be covered include:

- Society, communities and places of work
- Workplace protocols, e.g. policies and procedures manual
- Cultural diversity and cultural change
- Religious practices and protocols
- Social protocols and relevant etiquette
- Ranks and roles in society and corporate companies

Internal Assessment Criteria and Weight

- Various protocols are analysed in relation to society, communities and places of work (50%)

- The application of cultural awareness is justified in relation to cultural diversity, cultural change and religious practices (50%)

(Weight 40%)

7.2.3. KM-07-KT03: Professional skills and development (20%)

Topic elements to be covered include:

- Time management
- Stress management
- Problem solving and thinking styles
- Continuous professional development
- Personal development
- Personal safety and security awareness

Internal Assessment Criteria and Weight

- Principles of time management as it applies to health products sales environment are discussed (15%)
- Principles of stress management as it applies to health products sales environment are discussed (15%)
- Concept of and methods to achieve continuous professional development are reasoned (15%)
- The importance of problem solving is justified - with examples (20%)
- Concept of and methods to achieve personal development are reasoned (20%)
- Risks to personal safety and security are identified and ways to mitigate those are listed (15%)

(Weight 10%)

7.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Lesson Plans
- Learning Material

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- N/A

7.4 Exemptions

- No exemptions but the course can be completed in full through the RPL process

8. 243302-000-00-00-KM-08, Events Planning and Presentation Skills, NQF Level 5, Credits 2

8.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of event management principles applicable to equipment and supplies, and nutraceutical, pharmaceutical and medical products

The learning will enable learners to demonstrate an understanding of:

- KM-08-KT01: Events and conferences (50%)
- KM-08-KT02: Presentations (50%)

8.2 Guidelines for Topics

8.2.1. KM-08-KT01: Events and conferences (50%)

Topic elements to be covered include:

- Types of events
- Planning
- Coordinating
- Executing
- Legal and cultural aspects related to events planning
- CPD accreditation

Internal Assessment Criteria and Weight

- Basic principles related to the planning of events and conferences are analysed and take codes of practice and legislation into account (35%)
- Planning activities are analysed for appropriateness to the event or conference type (35%)
- An event plan based on all the topic elements is devised (30%)

(Weight 50%)

8.2.2. KM-08-KT02: Presentations (50%)

Topic elements to be covered include:

- Types of presentations
- Objectives
- Principles (structure, content, clarity and overall impression)
- Using media (electronic and visual aids) (clarity, colour, language, illustrations, sound quality)
- Target audience (could be individual)
- Selection and presentation of information
- Presentation delivery (Voice projection, language use, eye contact, body language, adaptability)
- Time utilisation

Internal Assessment Criteria and Weight

- Types of presentations are described (20%)
- The importance of having a clear understanding of a set of objectives as it relate to the target audience is explained (20%)
- Principles which underpin good presentation, design and use of media are explained (20%)
- The way to extract essence or critical information within the constraints of regulations is demonstrated (20%)
- The impact of effective presentation delivery and time management to achieve the set objectives is explained (20%)

(Weight 50%)

8.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Lesson Plans
- Learning Material

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- N/A

8.4 Exemptions

- No exemptions but the course can be completed in full through the RPL process

SECTION 3B: PRACTICAL SKILL MODULE SPECIFICATIONS

List of Practical Skill Module Specifications

- 243302-000-00-00-PM-01, Define and Analyse Sales and Marketing Environment for Health Products, NQF Level 5, Credits 6
- 243302-000-00-00-PM-02, Manage Customer Databases and Relationships, NQF Level 5, Credits 4
- 243302-000-00-00-PM-03, Apply Product and Other Relevant Knowledge in order to Prepare for Health Products Sales, NQF Level 5, Credits 14
- 243302-000-00-00-PM-04, Sell Health Products to Achieve Targets, NQF Level 5, Credits 8
- 243302-000-00-00-PM-05, Plan Events and Present Information on Health Products, NQF Level 5, Credits 4

1. 243302-000-00-00-PM-01, Define and Analyse Sales and Marketing Environment for Health Products, NQF Level 5, Credits 6

1.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to define and analyse sales and marketing targets of health products including but not limited to medical, dental and veterinary equipment and supplies, IVDs, health products and health supplements

The learner will be required to:

- PM-01-PS01: Act in accordance with ethical and legal codes relating to health products promotion
- PM-01-PS02: Apply own, industry and competitor pricing models
- PM-01-PS03: Conduct a sales territory analysis in order to develop a relevant territory plan
- PM-01-PS04: Implement sales and marketing strategies for health products
- PM-01-PS05: Analyse market trends and provide input for marketing and sales strategies
- PM-01-PS-06: Negotiate prices, terms and contracts

1.2 Guidelines for Practical Skills

1.2.1. PM-01-PS01: Act in accordance with ethical and legal codes relating to health products promotion

Scope of Practical Skill

Given information on a health products sales environment which includes all health products (Health Products Act) the learner must be able to:

- Apply ethical and legal codes in their day-to-day activities
- Demonstrate ethical behaviour
- Maintain customer and patient confidentiality
- Develop self as a professional person
- Act in an advocacy role to protect patient/consumer rights

Applied Knowledge

- Ethical and legal codes

Internal Assessment Criteria

- Own personal position is demonstrated in response to ethical dilemmas
- Compliance with the applicable marketing codes is displayed by all actions
- The values of the professional ethical value system are applied in all interactions with customers
- Situations outside scope of competence are referred to an appropriate source
- Information is delivered accurately and in a manner that preserves and protects client dignity and rights

- Customer rights are consistently protected and promoted by own actions
- Conflicting loyalties are identified and resolved in terms of professional ethical values and codes of ethics

1.2.2. PM-01-PS02: Apply own, industry and competitor pricing models

Scope of Practical Skill

Given legislation and applicable industry guidelines controlling the price of health products the learner must be able to:

- Apply legislation controlling health products pricing in the sector
- Consider factors (such as key accounts, algorithms, formulary, co-payments, medical aid, reimbursement, PMB, chronic list, DSPs, etc.), health technology procurement and reimbursement policies, health technology assessment which influence prices and customer decision making
- Utilise the above information in presentations, customer interactions or when handling objections

Applied Knowledge

- Pricing models related to own company, competitors and funders pricing models

Internal Assessment Criteria

- Conversant with single existing pricing models
- Conversant with funder manage health care pricing models

1.2.3. PM-01-PS03: Conduct a sales territory analysis in order to develop a relevant territory plan

Scope of Practical Skill

Given information on a range of products and company objectives and related information the learner must be able to:

- Gather data relevant to the sales environment to operate effectively
- Interpret data and marketing information to identify key issues in the specific territory
- Make recommendations to meet identified objectives
- Develop and implement activities

Applied Knowledge

- A broad understanding of principles, methods and techniques for conducting sales situational analyses
- A broad and integrated understanding of methods and techniques for analysing data from sales situational analyses

Internal Assessment Criteria

- Appropriate data relevant to the sales territory is gathered. Appropriate data include, but is not limited to: financial, demographic and market data. Data sources include but are not limited to IMS, Impact RX, internal and external sales data, call reports and competitor intelligence
- Data is gathered within the agreed to timeframe
- Methodical and structured processes are utilised to gather data
- A stepwise approach is applied to data interpretation
- A SWOT analysis is completed from both an internal and external perspective to identify the main issues
- The documentation and presentation of the analysed data are carried out according to the agreed format
- Data is used to identify key issues and set objectives
- All relevant factors are taken into consideration in making recommendations to meet the set objectives. All relevant factors include but are not limited to: Competitor information, data, environment, mapped territory
- Recommendations are within resource limitations. Resources include, but are not limited to: Budgetary, ethical, manpower, and operational

1.2.4. PM-01-PS04: Implement sales and marketing strategies for health products

Scope of Practical Skill

Given a marketing strategy (case study, scenario or DVD) the learner must be able to:

- Understand and apply sales and marketing strategies
- Attend a marketing strategy briefing session (which could be DVD or role play)
- Become familiar with the marketing materials
- Practice using the marketing or promotional materials in a role play doing a sales call based on the strategy
- Be signed off based on a selling check list

Applied Knowledge

- Concept of sales targets
- Understanding of management requirements

Internal Assessment Criteria

- Marketing materials are used to support sales
- Sales activities are planned in support of the company's marketing strategy

1.2.5. PM-01-PS05: Analyse market trends and provide input for marketing and sales strategies

Scope of Practical Skill

Given market research data on a product the learner must be able to:

- Identify and analyse new and growing market trends
- Identify and analyse declining markets
- Recommend strategies to explore market trends
- Recommend strategies to retain customers and if possible grow new customers
- Apply statistical analysis or alternate methods to identify market shrinkage

Applied Knowledge

- SWOT analysis
- Methods to analyse market trends

Internal Assessment Criteria

- Market trends are identified and explored to optimise sales in a sales territory

1.2.6. PM-01-PS06: Negotiate prices, terms and contracts

Scope of Practical Skill

Given a health products and company strategy and pricing and contract the learner must be able to:

- Identify steps for the application for health products reimbursement
- Implement principles of procurement for health products

Applied Knowledge

- Health products reimbursement policy
- Procurement principles

Internal Assessment Criteria

- Compile a generic process flow chart that reflects the steps toward obtaining reimbursement for a product
- Review an existing contract and identify the relevant section relating to prices and terms

1.3 Provider Programme Accreditation Criteria

Physical Requirements:

- All equipment/information specified in the scope statement

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher

- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- OHS compliant

1.4 Exemptions

- None

2. 243302-000-00-00-PM-02, Manage Customer Databases and Relationships, NQF Level 5, Credits 4

2.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner with an opportunity to establish positive relationships with internal and external customers whereby developing and growing the customer database for selling health products

The learner will be required to:

- PM-02-PS01: Define the market for selling of health products
- PM-02-PS02: Develop a contact strategy for a given database
- PM-02-PS03: Manage and maintain a sales territory
- PM-02-PS04: Analyse principles of interaction styles to respond to the different interactive styles in client relationships by flexing to the style of the customer
- PM-02-PS05 Apply style flexing techniques to customer interaction
- PM-02-PS06: Identify opportunities and grow customer data base
- PM-02-PS07: Analyse and manage customer shrinkage/ decline within client data base

2.2 Guidelines for Practical Skills

2.2.1. PM-02-PS01: Define the market for selling of health products

Scope of Practical Skill

Given a customer data base of diverse customers and information on market and a health product the learner must be able to:

- Apply a customer segmentation tool to analyse the customer data base
- Identify different types of customers e.g. funders, tenders, individuals, buyer groups etc.
- Identify sales potential within the different groups using appropriate tools

Applied Knowledge

- Customer segmentation tools
- Product knowledge

Internal Assessment Criteria

- A customer segmentation tool is applied to analyse the customer data base
- Presentation of a market segmentation exercise/case study is conducted
- Customer data base is analysed and presented

2.2.2. PM-02-PS02: Develop a contact strategy for a given database

Scope of Practical Skill

Given customer information, territory information, sales targets, product(s) line up, number of products the learner must be able to:

- Calculate call rate in order to meet set targets
- Establish frequency within a sales cycle
- Monitor coverage of the sales territory
- Manage diary in an efficient manner
- Develop an implementation plan for implementing the contact strategy
- Assess the strategy and effect changes to ensure sales target is met

Applied Knowledge

- Customer and territory knowledge
- Product knowledge

Internal Assessment Criteria

- Sales calls are planned according to defined frequency cycle
- The strategy is reported and revised to ensure sales targets are met

2.2.3. PM-02-PS03: Manage and maintain a sales territory

Scope of Practical Skill

Given a product line up, the speciality of HCP, the customer contact preference, the territory that will include the bricks, call rate coverage and frequency with a description of unforeseen events the learner must be able to:

- Develop an individual and team route plan
- Develop and update an annual plan, as well as a monthly, cycle and daily plan
- Maintain a time management system as per company requirements
- Build a diary with appointments for three months
- Maintain a rolling diary for a sales cycle in advance
- Include other contact possibilities
- Build a contingency plan to address any deviations from the plan

Applied Knowledge

- Sales territory analysis
- Product knowledge
- Customer contact strategies

Internal Assessment Criteria

- Ability to efficiently and effectively manage a territory to achieve sales targets is demonstrated

2.2.4. PM-02-PS04: Analyse principles of interaction styles to respond to the different interactive styles in client relationships by flexing to the style of the customer

Scope of Practical Skill

Given information on a range of internal and external clients including, but not limited to, intermediaries, managers, human resource practitioners, broker consultants, call centre staff, support staff, account executives, fund managers and learners in client relations the learner must be able to:

- Analyse interactive styles in managing interactions with people in different situations
- Explore the application of basic principles of a client centred relationship
- Apply a selected behaviour/interactive style model to a specific client relationship
- Propose a strategy to ensure sustainable client relationships that is consistent with a selected work environment

Applied Knowledge

- Model of behavioural/interactive style
- Product knowledge
- Client centred relationships

Internal Assessment Criteria

- The knowledge of own behaviour is applied in creating sustainable client relationships
- Interactive styles of clients and self are assessed to accommodate their behaviour to that of the client
- Personal interactions with people in different situations are analysed and the appropriateness of the learner's own response in each situation is interpreted based on personal reflection
- Strategies to manage responses are suggested for different predictable and unpredictable scenarios
- The chain reactions that emanate from specific interactive styles are explored and an indication is given of the impact of negative and positive interactions
- The fundamentals of sustainable client centred relationships are researched and applied to a specific work environment
- The dynamics between personal, corporate and client values are explained with reference to the implications for client relationships
- Different models of interactive style/behaviour are researched and compared in terms of their theories of people interaction
- A model of behavioural/interactive style is selected and applied to a specific client relationship
- An individual behaviour/interactive style is adapted to different client behavioural/interactive styles and different scenarios

- Using a range of possible assessment methods, the different preferences of customers are identified and used to inform selling styles

2.2.5. PM-02-PS05: Apply style flexing techniques to customer interaction

Scope of Practical Skill

Given social styles models and customer information the learner must be able to:

- Evaluate customer behaviour to determine the interactive style
- Evaluate own interactive style
- Determine how self will style flex based on own and customer interactive style
- Apply social interaction styles in different situations

Applied Knowledge

- Model of behavioural/interactive style
- Product knowledge
- Client centred relationships
- Style flexing techniques

Internal Assessment Criteria

- Social interactive styles are selected and applied during the process as appropriate

2.2.6. PM-02-PS06: Identify opportunities and grow customer data base

Scope of Practical Skill

Given circumstances e.g. new hospital opening, pharmacy around the corner, customer mentioning going to a journal club, etc. the learner must be able to:

- Brainstorm, list and apply methods to identify opportunities for growth and expansion
- Investigate opportunities for business
- Design a list of questions to source information on potential customer
- Compile a report on the findings
- Implement appropriate strategy to increase customer data base

Applied Knowledge

- Model of behavioural/interactive style
- Product knowledge
- Client centred relationships

Internal Assessment Criteria

- An effective data base of current and potential customers is maintained

2.2.7. PM-02-PS07: Analyse and manage customer shrinkage/ decline within client data base

Scope of Practical Skill

Given scenario with a declining customer database and market trends the learner must be able to:

- Identify the shortcomings or limitations of data entailed in the different customer and market intelligence reports where applicable
- Conduct a SWOT analysis on a particular customer or group of customers with a specific focus
- Apply qualitative analysis to determine customer decline
- Compile and present a report giving reasons for customer shrinkage and identifying possible remedial actions

Applied Knowledge

- SWOT analysis
- Product knowledge
- Qualitative analysis techniques
- Report writing

Internal Assessment Criteria

- Customer shrinkage/decline is analysed to determine possible causes
- A report is compiled which include suggestions to remedy shrinkage/ decline

2.3 Provider Programme Accreditation Criteria

Physical Requirements:

- All equipment/information specified in the scope statement

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- OHS compliant

2.4 Exemptions

- None

3. 243302-000-00-00-PM-03, Apply Product and Other Relevant Knowledge in order to Prepare for Health products Sales, NQF Level 5, Credits 14

3.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner with an opportunity to use an understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions when promoting and selling health products

The learner will be required to:

- PM-03-PS01: Use an understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions
- PM-03-PS02: Provide information about health products which is based on pharmacology and pharmaceuticals
- PM-03-PS03: Analyse and interpret available product -specific resources such as MIMS and product manuals
- PM-03-PS04: Analyse and interpret a package insert (PI) for health products and instructions for use (IFU) for health technology
- PM-03-PS05: Apply research skills to analyse scientific data
- PM-03-PS06: Apply product and other relevant knowledge when promoting and selling products
- PM-03-PS07: Research competitor products and services
- PM-03-PS08: Support for recall / withdrawal of health products

3.2 Guidelines for Practical Skills

3.2.1. PM-03-PS01: Use an understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions

Scope of Practical Skill

Given information on a range of queries or complaints, a range of common conditions and product information on a range of products the learner must be able to:

- Apply accepted medical terminology
- Select and apply knowledge of the structure and the function of systems of the body to provide appropriate answers or solutions on queries and complaints
- Select and apply knowledge of the pathophysiology of common conditions to provide appropriate answers or solutions on queries and complaints
- Select and apply knowledge of microbiology as it relates to common conditions to provide appropriate answers or solutions on queries and complaints
- Select and apply knowledge of therapeutic options used for the management of common conditions to provide appropriate answers or solutions on queries and complaints

Applied Knowledge

- Anatomy, Physiology, pathophysiology of the human body

Internal Assessment Criteria

- The elements of a cell are identified and their functions described
- The structure and functions of various body tissues are differentiated
- The purpose, structure and function of the organs related to the listed systems are described
- The normal structure and function of the listed systems are identified and described
- The causes of specific conditions are described for each of the listed aspects
- The pathophysiology of specific conditions is explained
- Factors which may prevent or alter specific disease patterns are identified
- The various forms of micro-organisms which cause specific infections are described
- The basic principles of anti-microbial therapy commonly used in treating specific infections are described
- The body's protective systems and processes against specific infections are described
- The types and uses of vaccines in the prevention of infection are explained
- National treatment protocols and criteria for the administration of vaccines are discussed
- Selected treatment options for management of specific conditions are described. Treatment options include, but are not limited to, medications, lifestyle modification and surgical interventions
- Diagnostic tests and procedures are explained in terms of their use in the overall management of specific conditions
- Relevant clinical information is accessed and used to promote effective communication

3.2.2. PM-03-PS02: Provide information about health products which is based on pharmacology and pharmaceuticals

Scope of Practical Skill

Given a range of health products and appropriate resources the learner must be able to:

- Apply the principles of pharmacokinetics and pharmacodynamics
- Take into account how the principles of pharmaceuticals influence the effects of health products in the body when providing information
- Take into account the factors which affect the safety of health products in patient care when providing information

Applied Knowledge

- Applicable legislation
- Understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions

Internal Assessment Criteria

- The absorption, distribution, metabolism and excretion of health products in the human body (pharmacokinetics) are described. Effects include but are not limited to therapeutic, undesired and adverse effects
- The effects of health products on the systems and organs of the body (pharmacodynamics) are described
- The therapeutic classification of health products is described to match action with treatment objectives. Officially recognised systems of therapeutic classification are utilised
- Pharmaceutical factors which affect the delivery and action of a health products in the body are described so that an appropriate dosage form may be selected
- Factors include but are not limited to the use of excipients, coatings and vehicles
- Possible dosage forms and routes of administration are described in terms of desired therapeutic outcomes
- Interactions and the safety of health products are described in accordance with current regulatory requirements and available information
- The regulatory requirements relating to the reporting of adverse reactions to health products are explained
- Actions to be taken in the event of a health products recall to ensure effective communication and implementation are explained
- Methods to ensure effective pharmaceutical products supply and storage are described in terms of product integrity. Includes, but is not limited to, relevant regulation, schedules, quality assurance, documentary requirements and storage

3.2.3. PM-03-PS03: Analyse and interpret available product -specific resources such as MIMS and product manuals

Scope of Practical Skill

Given MIMS, a questionnaire, a list of health conditions with symptoms and a list of products the learner must be able to:

- Identify pharmacological classification of health products or class of medical device
- Identify and explain the various sections within the PI/IFU for a range of products
- Identify and discuss products the HCP could prescribe or use
- Identify the advantages and disadvantages of different routes of administration, application or mechanism of intervention

Applied Knowledge

- Applicable legislation
- Understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions

Internal Assessment Criteria

- Product information is applied to case studies to illustrate understanding of product information

3.2.4. PM-03-PS04: Analyse and interpret a package insert (PI) for health products and instructions for use (IFU) for health technology

Scope of Practical Skill

Given a package insert and/or Instruction for Use for a health product the learner must be able to:

- Identify the generic and propriety names
- Identify the manufacturer
- Identify where (what body system) or how (what is the mode of action) of the product
- If a health product, identify where the health product is absorbed, metabolised and excreted
- If a health product, identify factors influencing absorption and distribution
- Identify how the health product is administered and/or used and motivate why it is administered/used by this route
- If a health product, identify the dose and factors influencing this dose
- Identify for what conditions the health product may be used
- Identify whether the health product is used to treat, manage, relieve or prevent a disease
- Identify any limitations/precautions contra-indications on using the health product with other health products
- Identify adverse reactions associated with this health product
- Identify, if any, the contra-indications
- Identify the schedule of the health product or class of medical device and where it may be sold / supplied

Applied Knowledge

- Applicable legislation
- Understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions
- Product knowledge

Internal Assessment Criteria

- PI and IFU are used as principle information sources in advising about the product

3.2.5. PM-03-PS05: Apply research skills to analyse scientific data

Scope of Practical Skill

Given a range of clinical trials (e.g. double blind, randomized, placebo controlled, meta-analysis), pharmacoeconomic studies, sources of information (google, magazines, package inserts, learner guides, medical dictionaries and MIMS) and an assessment sheet the learner must be able to:

- Analyse the study report by identifying the following:
- Primary, secondary and tertiary outcomes achieved
- Identify the principle investigator
- Publication information (date, location of the trial, journal, peer reviewed)
- Rating of the impact factors
- Identify statistical analysis
- The clinical study results are accurately, fairly and ethically paraphrased in a report
- Presentation of results (clinically or statistical significant)
- Make a conclusion on the quality of the study report taking into account design, results, weighting and bias
- Have a hard, unmarked copy of the clinical trial available
- Confirm that claims made in the report are within the approved package insert or instruction for use
- Obtain permission to hand out copies

Applied Knowledge

- Applicable legislation
- Understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions
- Product knowledge
- Clinical trials

Internal Assessment Criteria

- The study/analysis is comprehensive and fair
- Conclusion is based on the analysis and is accurate and balanced
- The words used are ethical and in accordance with relevant codes and legislation
- Key points are selected to demonstrate the features
- Ability to answer technical questions on the presented material is demonstrated
- The methods used for the analysing of clinical and pharmacoeconomic study results are explained to identify a method appropriate for given circumstances
- The identified method for analysis is used to interpret the results of the specific study and suitable methods for given circumstances are identified
- The outcomes of the analysis are used to design a strategy which highlights the specific advantages of the given product in a fair and ethical way

- The paraphrased and related information is communicated to the client, in order to demonstrate the effective and appropriate use of the particular product so that the patient receives the best treatment option available

3.2.6. PM-03-PS06: Apply product and other relevant knowledge when promoting and selling products

Scope of Practical Skill

Given an assignment on finding relevant product knowledge the learner must be able to:

- Research one condition of three of the ten different anatomical systems
- Research therapeutic (pharmacological and non-pharmacological) management options
- Research product options within own portfolio and that of the competitor
- Identify and discuss the benefits and features of the selected product in comparison with competitors
- Argue and convince as to the superiority of the product

Applied Knowledge

- Applicable legislation
- Understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions
- Product knowledge

Internal Assessment Criteria

- Relate health conditions to product features and benefits

3.2.7. PM-03-PS07: Research competitor products and services

Scope of Practical Skill

Given a range of (own company) products the learner must be able to:

- Identify and list competitor products
- Select one or more competitor product(s)
- Analyse and compare the benefits and features of the selected products
- Apply product differentiators in a sales pitch

Applied Knowledge

- Applicable legislation
- Understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions
- Product knowledge
- Market knowledge

Internal Assessment Criteria

- Competitor products and services are identified and researched and compared with similar products or services from own company in relation to the benefits and features
- A sales pitch is developed based on product differentiators

3.2.8. PM-03-PS08: Support for recall / withdrawal of health products

Scope of Practical Skill

Given regulatory guidelines on product recall and product information the learner must be able to:

- Read the relevant paragraphs of the regulatory guidelines on recall / withdrawal of health products
- Draw up a check list according to company specific procedures to handle a health product recall taking legislation into account
- Describe own involvement, if any, for each of the situations / recalls

Applied Knowledge

- Applicable legislation
- Understanding of anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions

Internal Assessment Criteria

- Respective roles in the product recall procedure are identified
- The ability to complete necessary documentation as per scope of practice in the process of supporting a product recall is displayed

3.3 Provider Programme Accreditation Criteria

Physical Requirements:

- All equipment/information specified in the scope statement

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- OHS compliant

3.4 Exemptions

- None

4. 243302-000-00-00-PM-04, Sell Health Products to Achieve Targets, NQF Level 5, Credits 8

4.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to construct an argument to convince customers of value proposition/ unique selling point and to develop selling skills to identify client needs that may be met by range or products within sales portfolio and close a sale

The learner will be required to:

- PM-04-PS01: Construct an argument to convince customers of value proposition/ unique selling point
- PM-04-PS02: Develop selling skills to identify client needs that may be met by range or products within sales portfolio
- PM-04-PS03: Identify customer needs or wants and present the customer with opportunities based on these needs or wants
- PM-04-PS04: Create a dialogue to sell the selected health product
- PM-04-PS05: Conduct a sales call to sell a health product and take an order
- PM-04-PS06: Close a sale
- PM-04-PS07: Evaluate a sales call
- PM-04-PS08: Receive and respond to customer queries and requests
- PM-04-PS09: Update knowledge for products, services and regulations
- PM-04-PS10: Merchandise products to the market

4.2 Guidelines for Practical Skills

4.2.1. PM-04-PS01: Construct an argument to convince customers of value proposition/ unique selling point

Scope of Practical Skill

Given product information on a range of products and for a specific customer as well as criteria for the dialogue the learner must be able to:

- Differentiate own product
- Anticipate potential objections and possible ways for dealing with the objections
- Construct a dialogue with a logical sequence of arguments to build up to the USP or value proposition including possible responses to objections
- Cross-check the argument using predetermined criteria or checklist

Applied Knowledge

- Product knowledge
- Legislation and marketing code compliance
- Customer knowledge

Internal Assessment Criteria

- A convincing sales argument is constructed based on product knowledge and unique selling point
- An effective sales call is implemented

4.2.2. PM-04-PS02: Develop selling skills to identify client needs that may be met by range or products within sales portfolio

Scope of Practical Skill

Given scenarios with a range of interaction contexts (could be role play or DVD) with product features and benefits the learner must be able to:

- Formulate bridging statements appropriate to the product and customer line-up
- Identify and create needs to sell to a client

Applied Knowledge

- Product knowledge
- Legislation and marketing code compliance
- Customer knowledge

Internal Assessment Criteria

- Movement between products is done in a seamless and nuanced way
- Bridging statements appropriate to the product and customer line-up are formulated
- Needs to sell to a client are identified and created

4.2.3. PM-04-PS03: Identify customer needs or wants and present the customer with opportunities based on these needs or wants

Scope of Practical Skill

Given the specific area of interest of the client, the learner must be able to:

- Apply different questioning techniques to establish customer requirements, needs and wants
- Differentiate between perceived needs and wants
- Identify actual needs and/or create need through dialogue
- Address identified or created needs using product features and benefits

Applied Knowledge

- Product knowledge
- Legislation and marketing code compliance
- Customer knowledge

Internal Assessment Criteria

- Client needs and specifications are analysed to determine appropriate focus for the presentation
- Product information is applied

4.2.4. PM-04-PS04: Create a dialogue to sell the selected health product

Scope of Practical Skill

Given an instruction to create a dialogue on a selected product which had been researched the learner must be able to:

- Set a pre-call objective
- Select and use an effective opening for the sales interaction
- Plan and select an effective /action closing
- Identify techniques for rapport building
- Identify suitable objection handling techniques and information
- Identify techniques and product information for managing questions
- Identify the features and benefits of the health product
- Formulate linking/bridging statements between products (linked sales) for upselling and cross selling
- Analyse the script to identify any gaps or areas for improvement

Applied Knowledge

- Knowledge (product, price/cost, disease, competitor, market, managed health care products)
- Post-call analysis
- Legislation and marketing code compliance

Internal Assessment Criteria

- All aspects are included in the dialogue
- The observation checklist is applied to identify and discuss gaps
- Opportunity to cross-sell or up-sell products is identified

4.2.5. PM-04-PS05: Conduct a sales call to sell a health product and take an order

Scope of Practical Skill

Given a script on a selected product which had been researched the learner must be able to:

- Allocate roles according to sales representative and customer styles (style flexing)
- Indicate which step of the sales cycle they are in

- Apply a strategy to move the customer up the sales cycle
- Apply active listening techniques
- Apply an observation checklist as self-assessment to identify possible improvements in the script and the application thereof

Applied Knowledge

- Product knowledge
- Customer knowledge
- Selling techniques
- Post-call analysis
- Legislation and marketing code compliance

Internal Assessment Criteria

- A sales call (role play) is conducted applying an appropriate script, product knowledge and style flexing
- A sales call is analysed using a checklist and shortfalls are identified with suggestions to address such shortfalls

4.2.6. PM-04-PS06: Close a sale

Scope of Practical Skill

Given an instruction to create a role play script on a selected product which had been researched the learner must be able to:

- Obtain an order or commitment to prescribe product
- Apply contractual arrangements when closing a sale where applicable
- Establish whether the customer (HCP) has followed through on commitment

Applied Knowledge

- Product knowledge
- Customer knowledge
- Legislation and marketing code compliance
- Selling techniques

Internal Assessment Criteria

- Procedures for closing a sale and follow through on commitment are applied

4.2.7. PM-04-PS07: Evaluate a sales call

Scope of Practical Skill

Given an audio-visual of a sales call and observation checklist the learner must be able to:

- Use the observation checklist to identify areas of strength, gaps or areas of improvement
- Develop a coaching plan to improve the above
- Complete a post call analysis
- Plan for the next call

Applied Knowledge

- Product knowledge
- Customer knowledge
- Legislation and marketing code compliance
- Selling techniques

Internal Assessment Criteria

- The sales call is analysed by applying sales skills criteria
- Checklist is completed indicating all criteria have been met or need improvement

4.2.8. PM-04-PS08: Receive and respond to customer queries and requests

Scope of Practical Skill

Given information supplied by customer on a range of type of queries or/and requests the learner must be able to:

- Apply active listening techniques when interacting with the customer
- Identify the issue and verify understanding with the customer
- Apply critical thinking to problem-solve the issue
- Distinguish between issues a representative may handle and those which must be referred for technical/medical input
- Consult with relevant parties to seek guidance
- Address the query or request accurately according to applicable legal standards and marketing code
- Complete an adverse event report form and convey to technical/medical department

Applied Knowledge

- Product knowledge
- Customer knowledge
- Legislation and marketing code compliance

Internal Assessment Criteria

- Issues that a representative may handle and those which must be referred for technical/medical input are distinguished in accordance with the marketing code and legislation
- An Adverse Event Report form is completed to convey issue to technical/medical department
- Queries are answered or directed appropriately

4.2.9. PM-04-PS09: Update knowledge for products, services and regulations

Scope of Practical Skill

Given an existing presentation on a product and sources of information the learner must be able to:

- Identify and access suitable sources of information
- Identify and select whether information is appropriate for use
- Use information to review and update an existing presentation to incorporate new information
- Change response to client based on new information
- Integrate changes to regulatory environment

Applied Knowledge

- Product knowledge
- Customer knowledge
- Legislation and marketing code compliance

Internal Assessment Criteria

- Updated and new information on health products, services and regulations are sourced to update existing information and presentations
- Changes to regulatory environment are integrated

4.2.10. PM-04-PS10: Merchandise products to the market

Scope of Practical Skill

Given a product range to be displayed in a healthcare environment, including gondolas, hot spots, point of sale, and window displays the learner must be able to:

- Apply the key principles and techniques of effective visual merchandising to build and maintain a display. Displaying includes designing displays, building displays, cross merchandising, accessorising, colour blocking, sizing, and theme
- Interpret a planogram to build and maintain a display
- Understand and implement planogram concepts to ensure company products are at relevant shelf level and have correct number of facings

- Replenish the displays taking into account rotation of stock, removal of unsalable products

Applied Knowledge

- Product knowledge
- Customer knowledge
- Legislation and marketing code compliance

Internal Assessment Criteria

- The legal requirements relating to the advertising of health products are taken into account when merchandising
- The requirements for stock with special requirements are identified and handling requirements are explained in terms of legislative and health and safety requirements
- Correct storage conditions are described in terms of legislative requirements, organisational policy and procedures and health and safety considerations
- Legal requirements and ethical codes relating to merchandising are explained in terms of their influence on the pharmaceutical industry
- Products to be displayed are identified in line with seasonal demands, promotions and slow moving products

4.3 Provider Programme Accreditation Criteria

Physical Requirements:

- All equipment/information specified in the scope statement

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- OHS compliant

4.4 Exemptions

- None

5. 243302-000-00-00-PM-05, Plan Events and Present Information on Health Products, NQF Level 5, Credits 4

5.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner with an opportunity to: present information to a customer and plan an event to sell and market health products in compliance with relevant code(s) of practice and regulatory framework

The learner will be required to:

- PM-05-PS01: Apply and present product knowledge when planning, developing and delivering a presentation
- PM-05-PS02: Plan the logistics of different types of events to sell and market health products in compliance with relevant code(s) of practice
- PM-05-PS03: Plan speakers, logistics, invitations, advertisements, material to hand out, menu, agenda/ program, etc. for a successful event to sell and market health products in compliance with relevant code(s) of practice

5.2 Guidelines for Practical Skills

5.2.1. PM-05-PS01: Apply and present product knowledge when planning, developing and delivering a presentation

Scope of Practical Skill

Given a basic presentation structure and visual aids and/or electronic software and self-assessment checklist the learner must be able to:

- Select one of the anatomical systems
- Select and analyse the target audience
- Decide on the purpose of the presentation
- Select media for the presentation
- Research, select, organise and reference content material
- Design a presentation which includes:
 - Introduction
 - Body of presentation
 - Identify hot spots and potential cold spots and decide how to address
 - Conclusion and bid for action
- Prepare for questions and answers
- Final conclusion and bid for action
- Prepare logistics
- Prepare support material and visual aids
- Identify aspects which could impact on the presentation

- Apply a checklist to perform a self-assessment on the presentation

Applied Knowledge

- Product knowledge
- Customer knowledge
- Legislation and marketing code compliance
- Presentation principles and methods

Internal Assessment Criteria

- Presentation planning, presentation development and handling of self during the presentation are demonstrated
- Overall success relating to the bid for action is analysed
- Presentation is delivered within specified time
- Client needs and specifications are analysed to determine appropriate focus for the presentation
- Information pertinent to the client needs is collated and the objectives are set
- The appropriate media are selected and assembled
- Principles of effective presentation are observed in the development of the presentation referring to structure, content, clarity and overall appearance
- Medium selected is appropriate to the circumstances, such as venue, audience, available services, time available
- The medium selected is optimised to ensure an effective presentation e.g. clarity, colour, language, illustrations and sound quality
- The content of the presentation accurately represents the material from which it was developed and is appropriate to the objective and the audience
- The references to the material used are accurately and fully presented
- Techniques such as voice projection, language use, eye contact, body language and adaptability of effective presentation delivery are applied
- Presentation is delivered to achieve the set objectives
- Available time is utilised to achieve the set objectives

5.2.2. PM-05-PS02: Plan the logistics of different types of events to sell and market health products in compliance with relevant code(s) of practice

Scope of Practical Skill

Given a case study with product, market and customer information and self-assessment checklist the learner must be able to:

- Analyse the implications of cultural, social and demographic aspects on the nature of the event

- Analyse and evaluate the environmental impact of the event on a community
- List and apply the steps to be taken to plan an event
- Research possible venues appropriate to the nature of the event and discuss any environmental impact the venue has encountered previously and how such aspects can be mitigated
- Compile an event scheduling plan in the form of a mind map or flow diagram, etc.
- Discuss which role-players to contact and liaise with internally and externally (local municipality/community) to ensure that the event is successful and within requirements
- Develop an event budget taking into account costs, income sources, monitoring expenditure and income and conducting a post-event review of meeting budget requirements
- Obtain input from the financial/sales and marketing divisions on the budget
- Discuss any payments and/or arrangements with the local community and request community contact to review budget requirements
- Analyse, evaluate and incorporate comments received from internal and external role-players into budget plan (show changes to initial plan)

Applied Knowledge

- Product knowledge
- Customer knowledge
- Legislation and marketing code compliance
- Event management principles and methods

Internal Assessment Criteria

- All aspects related to the event are covered by research
- The environmental impact of the event on the community and visa versa is analysed and appropriate recommendations are formulated
- Event planning is appropriate to the nature of the event
- Budget is comprehensive and includes evidence of interaction with internal and external role-players

5.2.3. PM-05-PS03: Plan speakers, logistics, invitations, advertisements, material to hand out, menu, agenda/ program, etc. for a successful event to sell and market health products in compliance with relevant code(s) of practice

Scope of Practical Skill

Given information on an intended topic based on the marketing code and self-assessment checklist the learner must be able to:

- Identify the target audience
- Identify appropriate speaker(s) and ensure the brief has been provided
- Identify appropriate promotional materials or items

- Compile a diagram of the layout of the venue indicating compliance with relevant codes
- Research food and beverage that need to be culturally acceptable and within budgeting requirements
- Compile an appropriate invitation and event program/agenda for the event and monitor and note RSVP
- Liaise with venue and service providers to confirm number of attendees
- Develop and present a brief opening introduction for the event

Applied Knowledge

- Product knowledge
- Customer knowledge
- Legislation and marketing code compliance
- Event management principles and methods

Internal Assessment Criteria

- An understanding of the implications of the relevant code of practice related to the setting up of the venue is demonstrated through use of the diagram
- A clearly defined set of participants and roleplayers such as speakers, audience, hosts, MC promotional material are demonstrated by the event plan
- Cultural and banqueting etiquette is applied

5.3 Provider Programme Accreditation Criteria

Physical Requirements:

- All equipment/information specified in the scope statement

Human Resource Requirements:

- Qualifications of facilitator: Pharmaceutical Sales Representation; NQF Level: 5, or equivalent or higher
- Certificate in facilitation, coaching, mentoring and learner support (Certificate in ETDP)
- Experience of facilitator: 1 year operational experience
- Facilitator/learner ratio: 1 facilitator to 20 learners

Legal Requirements:

- OHS compliant

5.4 Exemptions

- None

SECTION 3C: WORK EXPERIENCE MODULE SPECIFICATIONS

List of Work Experience Module Specifications

- 243302-000-00-00-WM-01, Health Products Sales and Marketing Environment Analysis, NQF Level 5, Credits 4
- 243302-000-00-00-WM-02, Customer Databases and Relationships Maintenance and Building, NQF Level 5, Credits 16
- 243302-000-00-00-WM-03, Health Products Sales, NQF Level 5, Credits 60
- 243302-000-00-00-WM-04, Events and Presentations, NQF Level 5, Credits 6
- 243302-000-00-00-WM-05, Induction and Company Policy, Procedures and Product Specific Training, NQF Level 5, Credits 10

1. 243302-000-00-00-WM-01, Health Products Sales and Marketing Environment Analysis, NQF Level 5, Credits 4

1.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Analyse the global and local sales and marketing environment of the company

The learner will be required to:

- WM-01-WE01: Co-work with an experienced health products sales representative or appropriate person at company to analyse the global and local sales and marketing environment of the company
- WM-01-WE02: Work independently to gather and analyse global and local information required for a sales and marketing environment analysis for a given sales territory

1.2 Guidelines for Work Experiences

1.2.1. WM-01-WE01: Co-work with an experienced health products sales representative or appropriate person at company to analyse the global and local sales and marketing environment of the company

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Incorporate ethical and legal codes relating to health products promotion into contractual sales, vendor and/or other agreements
- Able to apply own, industry and competitor pricing models. If selling health technology, able to apply for health technology reimbursement and able to implement principles of procurement
- Conduct a sales territory analysis in order to develop a relevant territory plan
- Implement sales and marketing strategies for health products
- Analyse market trends and provide input for marketing and sales strategies
- Conclude a contract to include product in listings
- Complete an observation checklist on correct use and application of sales techniques

Supporting Evidence

- Attendance register
- Observation checklists with comment and recommendation
- Sales and marketing environment analysis
- Sales and marketing strategy
- Product reimbursement document
- And/or other documents that support all practical activities of co-working on sales and marketing environment analysis

1.2.2. WM-01-WE02: Work independently to gather and analyse global and local information required for a sales and marketing environment analysis for a given sales territory

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Incorporate ethical and legal codes relating to health products promotion into contractual sales, vendor and/or other agreements
- Apply own, industry and competitor pricing models. If selling health technology, able to apply for health technology reimbursement and able to implement principles of procurement
- Receive and analyse information on a sales territory in order to develop a relevant territory plan
- Analyse market trends and provide input for marketing and sales strategies
- Draw up a plan to implement the sales and marketing strategies for health products for a given sales territory

Supporting Evidence

- Implementation plan for the sales and marketing strategy

1.3 Contextualised Workplace Knowledge

1 Company specific products and price range

2 Company specific territory

3 Company specific competitors

4 Company policies, procedures and protocols

5 Code of conduct and ethics

1.4 Criteria for Workplace Approval

Physical Requirements:

- Health products sales and marketing processes

Human Resource Requirements:

- Mentor/learner ratio: 1:6
- Mentor qualifications: NC: Pharmaceutical Sales Representative (NQF Level 5) or equivalent
- Mentor work experience: 2 years as sales representative
- In-field coach (learner to co-travel with) qualifications: 1 year as sales representative. Do not require PSR qualification.

Legal Requirements:

- OHS compliant

1.5 Additional Assignments to be Assessed Externally

- None

2. 243302-000-00-00-WM-02, Customer Databases and Relationships Maintenance and Building, NQF Level 5, Credits 16

2.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Build and manage customer database and relationships

The learner will be required to:

- WM-02-WE01: Co-work with experienced health products sales representative to build and manage customer database and relationships
- WM-02-WE02: Independently build and manage customer database and relationships

2.2 Guidelines for Work Experiences

2.2.1. WM-02-WE01: Co-work with experienced health products sales representative to build and manage customer database and relationships

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Define the target market for the product portfolio
- Observe the implementation of a contact strategy for a given database
- Interpret and evaluate a route plan for visits or calls for cost effectiveness and efficiency
- Manage and maintain a sales territory
- Identify opportunities and grow customer data base
- Observe the analysis and management of customer shrinkage/ decline within customer data base
- Analyse principles of interaction styles to respond to the different interactive styles in client relationships by flexing to the style of the customer
- Observe style flexing techniques during customer interaction

Supporting Evidence

- Attendance register
- An example of a sales territory plan and/or route plan
- Documents/screenshots of CRM or equivalent system to demonstrate territory and time management
- Document(s) to demonstrate application of interaction model to customers
- Call reports that illustrate awareness of growth opportunities and/or decline within existing database
- Documents that support all practical activities

2.2.2. WM-02-WE02: Independently build and manage customer database and relationships

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Define the target market for the product portfolio
- Develop and implement a contact strategy for a given database
- Compile a cost effective and efficient route plan for customer visits
- Manage and maintain a sales territory
- Identify opportunities and grow customer data base
- Analyse and manage customer shrinkage/ decline within client data base
- Analyse principles of interaction styles to respond to the different interactive styles in client relationships by flexing to the style of the customer
- Apply style flexing techniques when interacting with customers

Supporting Evidence

- Learner's own sales territory plan and/or route plan
- Documents/screenshots of CRM or equivalent system to demonstrate territory and time management
- Document(s) to demonstrate application of interaction model to customers
- Call reports that illustrate awareness of growth opportunities and/or decline within existing database
- Documents that support all practical activities

2.3 Contextualised Workplace Knowledge

1 Company specific products and price range

2 Company specific territory

3 Company specific competitors

4 Company policies, procedures and protocols

5 Code of conduct and ethics

2.4 Criteria for Workplace Approval

Physical Requirements:

- Customer databases building and maintenance
- Customer relationship building and maintenance

Human Resource Requirements:

- Mentor/learner ratio: 1:6

- Mentor qualifications: NC: Pharmaceutical Sales Representative (NQF Level 5) or equivalent
- Mentor work experience: 2 years as sales representative
- In-field coach (learner to co-travel with) qualifications: 1 year as sales representative. Do not require PSR qualification.

Legal Requirements:

- OHS compliant

2.5 Additional Assignments to be Assessed Externally

- None

3. 243302-000-00-00-WM-03, Health Products Sales, NQF Level 5, Credits 60

3.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Promote, market and sell health products to customers in compliance with prevailing legislation

The learner will be required to:

- WM-03-WE01: Co-work with experienced health products sales representatives to promote, market and sell health products to customers
- WM-03-WE02: Work independently to promote, market and sell health products to customers

3.2 Guidelines for Work Experiences

3.2.1. WM-03-WE01: Co-work with experienced health products sales representatives to promote, market and sell health products to customers

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Observe all naturally occurring work activities that a typical sales representative will be completing over a minimum of 10 non-continuous days
- Observe the construction of an argument to convince customers of value proposition/ unique selling point
- Develop selling skills to identify client needs that may be met by range or products within sales portfolio
- Conduct a sales call
- Identify customer needs or wants and present the customer with opportunities (features and benefits) based on these needs or wants
- Receive and respond to customer queries and requests
- Sell a health products and obtain an order or commitment
- Cross-sell and up-sell products and services to customers
- Merchandise products to the market (as appropriate)
- Analyse a post-call evaluation for improvement and set objectives and actions for the next call as required
- Assist with updating knowledge for products, services and regulations

Supporting Evidence

- The Field Visit Reports or equivalent document(s) belonging to the experienced sales rep for every sales visit conducted per territory/route plan on 10 different days are attached
- The above documents must indicate presence/contribution of the Learner
- All work activities must reflect on field visit reports/equivalent on at least 3 different occasions

3.2.2. WM-03-WE02: Work independently to promote, market and sell health products to customers

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Construct an argument to convince customers of value proposition/unique selling point
- Achieve sales and marketing targets of health products
- Manage sales portfolio to achieve targets
- Apply product and other relevant knowledge when marketing and selling products within funder guidelines and constraints
- Utilise clinical trial findings and pharmacoeconomic studies to promote products
- Merchandise products to the market
- Cross-sell and up-sell products and services to customers
- Analyse market trends and provide input for marketing and sales strategies
- Continuously report on achievements as per company procedures
- Make suggestions in terms of updating knowledge for products, services and regulations

Supporting Evidence

- The Field Visit Reports or equivalent document(s) belonging to the Learner sales rep for every sales visit conducted per territory/route plan on 10 different days are attached
- The above documents must indicate presence/contribution of the Learner
- All work activities must reflect on field visit reports/equivalent on at least 3 different occasions

3.3 Contextualised Workplace Knowledge

1 Company specific products and price range

2 Company specific territory

3 Company specific competitors

4 Company policies, procedures and protocols

5 Code of conduct and ethics

3.4 Criteria for Workplace Approval

Physical Requirements:

- Health products sales and marketing

Human Resource Requirements:

- Mentor/learner ratio: 1:6

- Mentor qualifications: NC: Pharmaceutical Sales Representative (NQF Level 5) or equivalent
- Mentor work experience: 2 years as sales representative
- In-field coach (learner to co-travel with) qualifications: 1 year as sales representative. Do not require PSR qualification.

Legal Requirements:

- OHS compliant

3.5 Additional Assignments to be Assessed Externally

- None

4. 243302-000-00-00-WM-04, Events and Presentations, NQF Level 5, Credits 6

4.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Train and educate customers on company products and/or other relevant topic through presentations and events

The learner will be required to:

- WM-04-WE01: Co-work (includes observation, partial assistance and/or working under supervision) with experienced health products sales representative to train and educate customers on company products and/or other relevant topic on at least 2 different occasions
- WM-04-WE02: Working independently, train and educate customers on company products and/or other relevant topic on at least 3 different occasions
- WM-04-WE03: Co-work (includes observation, partial assistance and/or working under supervision) with experienced health products sales representative to plan, organise and implement at least 2 educational events
- WM-04-WE04: Working independently, plan, organise and implement at least 2 educational events

4.2 Guidelines for Work Experiences

4.2.1. WM-04-WE01: Co-work (includes observation, partial assistance and/or working under supervision) with experienced health products sales representative to train and educate customers on company products and/or other relevant topic on at least 2 different occasions

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Plan for and deliver a presentation on product and/or therapeutic area and/or other relevant topic using a predesigned presentation
- Link the purpose of the presentation to the profile of the audience
- Select appropriate media for the presentation
- Prepare logistics related to the presentation
- Select appropriate support material and visual aids
- Identify potential challenges which could impact on the presentation
- Apply a checklist to perform a self-assessment on the presentation
- Report on attendance and outcome of the presentation

Supporting Evidence

- Presentation (power point /flipchart etc).
- Attendance Register
- Audience evaluation forms
- Presentation feedback by mentor

- Design a presentation which includes:
- Introduction
- Body of presentation
- Identify hot spots and potential cold spots and decide how to address
- Conclusion and bid for action
- Prepare for questions and answers
- Final conclusion and bid for action

4.2.2. WM-04-WE02: Working independently, train and educate customers on company products and/or other relevant topic on at least 3 different occasions

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Plan, develop and deliver a presentation on product and/or therapeutic area and/or other relevant topic
- Decide on the purpose of the presentation
- Select media for the presentation
- Research, select, organise and reference content material
- Design a presentation
- Prepare logistics
- Conduct a dry run of the presentation to determine possible success
- Prepare support material and visual aids
- Identify potential challenges which could impact on the presentation
- Apply a checklist to perform a self-assessment on the presentation
- Report on attendance and outcome of the presentation

Supporting Evidence

- Conduct a pre-presentation of the presentation to assess compliance and adequacy
- Presentation (power point/flipchart etc)
- Attendance Register
- Audience evaluation forms
- Presentation feedback by mentor
- Design a presentation which includes:
- Introduction

- Body of presentation
- Identify hot spots and potential cold spots and decide how to address
- Conclusion and bid for action
- Prepare for questions and answers
- Final conclusion and bid for action

4.2.3. WM-04-WE03: Co-work (includes observation, partial assistance and/or working under supervision) with experienced health products sales representative to plan, organise and implement at least 2 educational events

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Using company policy and adhering to necessary codes of practice, plan, organise and implement 2 separate events
- Analyse the implications of cultural, social and demographic aspects on the nature of the event
- Analyse and evaluate the environmental impact of the event on a community
- List and apply the steps to be taken to plan an event
- Research possible venues appropriate to the nature of the event and discuss any environmental impact the venue has encountered previously and how such aspects can be mitigated
- Compile an event scheduling plan in the form of a mind map or flow diagram, etc.
- Discuss which role-players to contact and liaise with internally and externally (local municipality/community) to ensure that the event is successful and within requirements
- Develop an event budget taking into account costs, income sources, monitoring expenditure and income and conducting a post-event review of meeting budget requirements
- Obtain input from the financial/sales and marketing divisions on the budget
- Discuss any payments and/or arrangements with the local community and request community contact to review budget requirements
- Analyse, evaluate and incorporate comments received from internal and external role-players into budget plan (show changes to initial plan)

Supporting Evidence

- Invitations/RSVP
- Agenda
- Training material
- Speaker agreements (if applicable)
- Event evaluation

- Budget
- Other relevant documents

4.2.4. WM-04-WE04: Working independently, plan, organise and implement at least 2 educational events

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Using company policy and adhering to necessary codes of practice, plan, organise and implement 2 separate events
- Analyse the implications of cultural, social and demographic aspects on the nature of the event
- Analyse and evaluate the environmental impact of the event on a community
- List and apply the steps to be taken to plan an event
- Research possible venues appropriate to the nature of the event and discuss any environmental impact the venue has encountered previously and how such aspects can be mitigated
- Compile an event scheduling plan in the form of a mind map or flow diagram, etc.
- Discuss which role-players to contact and liaise with internally and externally (local municipality/community) to ensure that the event is successful and within requirements
- Develop an event budget taking into account costs, income sources, monitoring expenditure and income and conducting a post-event review of meeting budget requirements
- Obtain input from the financial/sales and marketing divisions on the budget
- Discuss any payments and/or arrangements with the local community and request community contact to review budget requirements
- Analyse, evaluate and incorporate comments received from internal and external role-players into budget plan (show changes to initial plan)

Supporting Evidence

- Invitations/RSVP
- Agenda
- Training Material
- Speaker agreements (if applicable)
- Event evaluation
- Budget
- Other relevant documents

4.3 Contextualised Workplace Knowledge

- 1 Company specific products, price range
- 2 Company specific territory
- 3 Company specific competitors
- 4 Company policies, procedures and protocols
- 5 Code of conduct and ethics

4.4 Criteria for Workplace Approval

Physical Requirements:

- Events coordination
- Customer education

Human Resource Requirements:

- Mentor/learner ratio: 1:6
- Mentor qualifications: NC: Pharmaceutical Sales Representative (NQF Level 5) or equivalent
- Mentor work experience: 2 years as sales representative
- In-field coach (learner to co-travel with) qualifications: 1 year as sales representative. Do not require PSR qualification.

Legal Requirements:

- OHS compliant

4.5 Additional Assignments to be Assessed Externally

None

5. 243302-000-00-00-WM-05, Induction and Company Policy, Procedures and Product Specific Training, NQF Level 5, Credits 10

5.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to:

Study company specific policies, procedures, therapeutic areas and product details for products covered within the sales territory allocated to the Learner

The learner will be required to:

- WM-05-WE01: Study company specific therapeutic areas and product details for products covered within the sales territory allocated to the Learner (minimum of 10 days as allocated by company)
- WM-05-WE02: Study relevant internal and external protocols, policies and procedures (minimum of 2.5 days as allocated by company)

5.2 Guidelines for Work Experiences

5.2.1. WM-05-WE01: Study company specific therapeutic areas and product details for products covered within the sales territory allocated to the Learner (minimum of 10 days as allocated by company)

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Analyse and interpret available product specific resources such as MIMS, package insert, instruction for use (IFU), etc.
- Identify pharmacological classification of medicines or class of medical device
- Identify and explain the various sections within the PI/IFU for a range of products
- Identify and discuss products the HCP could prescribe or use
- Identify the advantages and disadvantages of different routes of administration, application or mechanism of intervention
- Utilise clinical trial findings and pharmacoeconomic studies to promote products

Supporting Evidence

- Internal assessment results as per company requirements
- Confirmation that the learner is able to demonstrate understanding of the following
- An understanding of relevant anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions
- Able to provide information about company products based on pharmacology and pharmaceutical principles
- Able to analyse and interpret available product specific resources such as MIMS, product manuals etc.
- Able to analyse and interpret a package insert/ information for use for company products
- Able to apply research skills to analyse scientific data

- Able to apply product and other relevant knowledge when promoting and selling products
- Able to research competitor products and services
- Able to support for recall/ withdrawal of health products

5.2.2. WM-05-WE02: Study relevant internal and external protocols, policies and procedures (minimum of 2.5 days as allocated by company)

Scope of Work Experience

The person will be expected to engage in the following work activities:

- Attend company specific induction program
- Analyse and interpret available company specific resources
- Apply correct protocols and procedures when calling on internal or external sites or specialised areas

Supporting Evidence

- Internal assessment results as per company requirements
- Attendance registers

5.3 Contextualised Workplace Knowledge

1 Company specific products and price range

2 Company specific territory

3 Company specific competitors

4 Company policies, procedures and protocols

5 Code of conduct and ethics

5.4 Criteria for Workplace Approval

Physical Requirements:

- Internal and external protocols, policies and procedures
- Health products sales and marketing

Human Resource Requirements:

- Mentor/learner ratio: 1:6
- Mentor qualifications: NC: Pharmaceutical Sales Representative (NQF Level 5) or equivalent
- Mentor work experience: 2 years as sales representative
- In-field coach (learner to co-travel with) qualifications: 1 year as sales representative. Do not require PSR qualification.

Legal Requirements:

- OHS compliant

5.5 Additional Assignments to be Assessed Externally

None

SECTION 4: STATEMENT OF WORK EXPERIENCE

Curriculum Number:	243302-000-00-00
Curriculum Title:	Health Products Sales Representative

Learner Details	
Name:	
ID Number:	

Employer Details	
Company Name:	
Address:	
Supervisor Name:	
Work Telephone:	
E-Mail:	

243302-000-00-00-WM-01, Health Products Sales and Marketing Environment Analysis, NQF Level 5, Credits 4

WM-01-WE01		
Co-work with an experienced health products sales representative or appropriate person at company to analyse the global and local sales and marketing environment of the company		
Scope of Work Experience	Date	Signature
Incorporate ethical and legal codes relating to health products promotion into contractual sales, vendor and/or other agreements		
Able to apply own, industry and competitor pricing models. If selling health technology, able to apply for health technology reimbursement and able to implement principles of procurement		
Conduct a sales territory analysis in order to develop a relevant territory plan		
Implement sales and marketing strategies for health products		
Analyse market trends and provide input for marketing and sales strategies		
Conclude a contract to include product in listings		
Complete an observation checklist on correct use and application of sales techniques		
Supporting Evidence	Date	Signature
Attendance register		
Observation checklists with comment and recommendation		
Sales and marketing environment analysis		
Sales and marketing strategy		
Product reimbursement document		
And/or other documents that support all practical activities of co-working on sales and marketing environment analysis		
WM-01-WE02		

Work independently to gather and analyse global and local information required for a sales and marketing environment analysis for a given sales territory		
Scope of Work Experience	Date	Signature
Incorporate ethical and legal codes relating to health products promotion into contractual sales, vendor and/or other agreements		
Apply own, industry and competitor pricing models. If selling health technology, able to apply for health technology reimbursement and able to implement principles of procurement		
Receive and analyse information on a sales territory in order to develop a relevant territory plan		
Analyse market trends and provide input for marketing and sales strategies		
Draw up a plan to implement the sales and marketing strategies for health products for a given sales territory		
Supporting Evidence	Date	Signature
Implementation plan for the sales and marketing strategy		

Contextualised Workplace Knowledge	Date	Signature
1. Company specific products and price range		
2. Company specific territory		
3. Company specific competitors		
4. Company policies, procedures and protocols		
5. Code of conduct and ethics		

Additional Assignments to be Assessed Externally	Date	Signature
None		

243302-000-00-00-WM-02, Customer Databases and Relationships Maintenance and Building, NQF Level 5, Credits 16

WM-02-WE01		
Co-work with experienced health products sales representative to build and manage customer database and relationships		
Scope of Work Experience	Date	Signature
Define the target market for the product portfolio		
Observe the implementation of a contact strategy for a given database		
Interpret and evaluate a route plan for visits or calls for cost effectiveness and efficiency		
Manage and maintain a sales territory		
Identify opportunities and grow customer data base		
Observe the analysis and management of customer shrinkage/ decline within customer data base		
Analyse principles of interaction styles to respond to the different interactive styles in client relationships by flexing to the style of the customer		
Observe style flexing techniques during customer interaction		
Supporting Evidence	Date	Signature
Attendance register		
An example of a sales territory plan and/or route plan		
Documents/screenshots of CRM or equivalent system to demonstrate territory and time management		
Document(s) to demonstrate application of interaction model to customers		
Call reports that illustrate awareness of growth opportunities and/or decline within existing database		

Documents that support all practical activities		
WM-02-WE02		
Independently build and manage customer database and relationships		
Scope of Work Experience	Date	Signature
Define the target market for the product portfolio		
Develop and implement a contact strategy for a given database		
Compile a cost effective and efficient route plan for customer visits		
Manage and maintain a sales territory		
Identify opportunities and grow customer data base		
Analyse and manage customer shrinkage/ decline within client data base		
Analyse principles of interaction styles to respond to the different interactive styles in client relationships by flexing to the style of the customer		
Apply style flexing techniques when interacting with customers		
Supporting Evidence	Date	Signature
Learner's own sales territory plan and/or route plan		
Documents/screenshots of CRM or equivalent system to demonstrate territory and time management		
Document(s) to demonstrate application of interaction model to customers		
Call reports that illustrate awareness of growth opportunities and/or decline within existing database		
Documents that support all practical activities		

Contextualised Workplace Knowledge	Date	Signature
1. Company specific products and price range		
2. Company specific territory		
3. Company specific competitors		
4. Company policies, procedures and protocols		
5. Code of conduct and ethics		

Additional Assignments to be Assessed Externally	Date	Signature
None		

243302-000-00-00-WM-03, Health Products Sales, NQF Level 5, Credits 60

WM-03-WE01	Date	Signature
Co-work with experienced health products sales representatives to promote, market and sell health products to customers		
Scope of Work Experience	Date	Signature
Observe all naturally occurring work activities that a typical sales representative will be completing over a minimum of 10 non-continuous days		
Observe the construction of an argument to convince customers of value proposition/ unique selling point		
Develop selling skills to identify client needs that may be met by range or products within sales portfolio		
Conduct a sales call		
Identify customer needs or wants and present the customer with opportunities (features and benefits) based on these needs or wants		
Receive and respond to customer queries and requests		
Sell a health products and obtain an order or commitment		

Cross-sell and up-sell products and services to customers		
Merchandise products to the market (as appropriate)		
Analyse a post-call evaluation for improvement and set objectives and actions for the next call as required		
Assist with updating knowledge for products, services and regulations		
Supporting Evidence	Date	Signature
The Field Visit Reports or equivalent document(s) belonging to the experienced sales rep for every sales visit conducted per territory/route plan on 10 different days are attached		
The above documents must indicate presence/contribution of the Learner		
All work activities must reflect on field visit reports/equivalent on at least 3 different occasions		
WM-03-WE02		
Work independently to promote, market and sell health products to customers		
Scope of Work Experience	Date	Signature
Construct an argument to convince customers of value proposition/unique selling point		
Achieve sales and marketing targets of health products		
Manage sales portfolio to achieve targets		
Apply product and other relevant knowledge when marketing and selling products within funder guidelines and constraints		
Utilise clinical trial findings and pharmacoeconomic studies to promote products		
Merchandise products to the market		
Cross-sell and up-sell products and services to customers		

Analyse market trends and provide input for marketing and sales strategies		
Continuously report on achievements as per company procedures		
Make suggestions in terms of updating knowledge for products, services and regulations		
Supporting Evidence	Date	Signature
The Field Visit Reports or equivalent document(s) belonging to the Learner sales rep for every sales visit conducted per territory/route plan on 10 different days are attached		
The above documents must indicate presence/contribution of the Learner		
All work activities must reflect on field visit reports/equivalent on at least 3 different occasions		

Contextualised Workplace Knowledge	Date	Signature
1. Company specific products and price range		
2. Company specific territory		
3. Company specific competitors		
4. Company policies, procedures and protocols		
5. Code of conduct and ethics		

Additional Assignments to be Assessed Externally	Date	Signature
None		

24332001-WM-04, Events and Presentations, NQF Level 5, Credits 6

WM-04-WE01		
Co-work (includes observation, partial assistance and/or working under supervision) with experienced health products sales representative to train and educate customers on company products and/or other relevant topic on at least 2 different occasions		
Scope of Work Experience	Date	Signature
Plan for and deliver a presentation on product and/or therapeutic area and/or other relevant topic using a predesigned presentation		
Link the purpose of the presentation to the profile of the audience		
Select appropriate media for the presentation		
Prepare logistics related to the presentation		
Select appropriate support material and visual aids		
Identify potential challenges which could impact on the presentation		
Apply a checklist to perform a self-assessment on the presentation		
Report on attendance and outcome of the presentation		
Supporting Evidence	Date	Signature
Presentation (power point /flipchart etc).		
Attendance Register		
Audience evaluation forms		
Presentation feedback by mentor		
Design a presentation which includes:		
Introduction		

Body of presentation		
Identify hot spots and potential cold spots and decide how to address		
Conclusion and bid for action		
Prepare for questions and answers		
Final conclusion and bid for action		
WM-04-WE02		
Working independently, train and educate customers on company products and/or other relevant topic on at least 3 different occasions		
Scope of Work Experience	Date	Signature
Plan, develop and deliver a presentation on product and/or therapeutic area and/or other relevant topic		
Decide on the purpose of the presentation		
Select media for the presentation		
Research, select, organise and reference content material		
Design a presentation		
Prepare logistics		
Conduct a dry run of the presentation to determine possible success		
Prepare support material and visual aids		
Identify potential challenges which could impact on the presentation		
Apply a checklist to perform a self-assessment on the presentation		
Report on attendance and outcome of the presentation		
Supporting Evidence	Date	Signature

Conduct a pre-presentation of the presentation to assess compliance and adequacy		
Presentation (power point/flipchart etc)		
Attendance Register		
Audience evaluation forms		
Presentation feedback by mentor		
Design a presentation which includes:		
Introduction		
Body of presentation		
Identify hot spots and potential cold spots and decide how to address		
Conclusion and bid for action		
Prepare for questions and answers		
Final conclusion and bid for action		
WM-04-WE03		
Co-work (includes observation, partial assistance and/or working under supervision) with experienced health products sales representative to plan, organise and implement at least 2 educational events		
Scope of Work Experience	Date	Signature
Using company policy and adhering to necessary codes of practice		
Analyse the implications of cultural		
Analyse and evaluate the environmental impact of the event on a community		
List and apply the steps to be taken to plan an event		

Research possible venues appropriate to the nature of the event and discuss any environmental impact the venue has encountered previously and how such aspects can be mitigated		
Compile an event scheduling plan in the form of a mind map or flow diagram, etc.		
Discuss which role-players to contact and liaise with internally and externally (local municipality/community) to ensure that the event is successful and within requirements		
Develop an event budget taking into account costs, income sources, monitoring expenditure and income and conducting a post-event review of meeting budget requirements		
Obtain input from the financial/sales and marketing divisions on the budget		
Discuss any payments and/or arrangements with the local community and request community contact to review budget requirements		
Analyse, evaluate and incorporate comments received from internal and external role-players into budget plan (show changes to initial plan)		
Supporting Evidence	Date	Signature
Invitations/RSVP		
Agenda		
Training material		
Speaker agreements (if applicable)		
Event evaluation		
Budget		
Other relevant documents		
WM-04-WE04		
Working independently, plan, organise and implement at least 2 educational events		

Scope of Work Experience	Date	Signature
Using company policy and adhering to necessary codes of practice, plan, organise and implement 2 separate events		
Analyse the implications of cultural, social and demographic aspects on the nature of the event		
Analyse and evaluate the environmental impact of the event on a community		
List and apply the steps to be taken to plan an event		
Research possible venues appropriate to the nature of the event and discuss any environmental impact the venue has encountered previously and how such aspects can be mitigated		
Compile an event scheduling plan in the form of a mind map or flow diagram, etc.		
Discuss which role-players to contact and liaise with internally and externally (local municipality/community) to ensure that the event is successful and within requirements		
Develop an event budget taking into account costs, income sources, monitoring expenditure and income and conducting a post-event review of meeting budget requirements		
Obtain input from the financial/sales and marketing divisions on the budget		
Discuss any payments and/or arrangements with the local community and request community contact to review budget requirements		
Analyse, evaluate and incorporate comments received from internal and external role-players into budget plan (show changes to initial plan)		
Supporting Evidence	Date	Signature
Invitations/RSVP		
Agenda		
Training Material		

Speaker agreements (if applicable)		
Event evaluation		
Budget		
Other relevant documents		

Contextualised Workplace Knowledge	Date	Signature
1. Company specific products, price range		
2. Company specific territory		
3. Company specific competitors		
4. Company policies, procedures and protocols		
5. Code of conduct and ethics		

Additional Assignments to be Assessed Externally	Date	Signature
None		

243302-000-00-00-WM-05, Induction and Company Policy, Procedures and Product Specific Training, NQF Level 5, Credits 10

WM-05-WE01		
Study company specific therapeutic areas and product details for products covered within the sales territory allocated to the Learner (minimum of 10 days as allocated by company)		
Scope of Work Experience	Date	Signature
Analyse and interpret available product specific resources such as MIMS, package insert, instruction for use (IFU), etc.		
Identify pharmacological classification of medicines or class of medical device		

Identify and explain the various sections within the PI/IFU for a range of products		
Identify and discuss products the HCP could prescribe or use		
Identify the advantages and disadvantages of different routes of administration, application or mechanism of intervention		
Utilise clinical trial findings and pharmacoeconomic studies to promote products		
Supporting Evidence	Date	Signature
Internal assessment results as per company requirements		
Confirmation that the learner is able to demonstrate understanding of the following		
An understanding of relevant anatomy, physiology and pathophysiology to interact with customers concerning therapeutic options for common conditions		
Able to provide information about company products based on pharmacology and pharmaceutical principles		
Able to analyse and interpret available product specific resources such as MIMS, product manuals etc.		
Able to analyse and interpret a package insert/ information for use for company products		
Able to apply research skills to analyse scientific data		
Able to apply product and other relevant knowledge when promoting and selling products		
Able to research competitor products and services		
Able to support for recall/ withdrawal of health products		
WM-05-WE02		
Study relevant internal and external protocols, policies and procedures (minimum of 2.5 days as allocated by company)		
Scope of Work Experience	Date	Signature
Attend company specific induction program		

Analyse and interpret available company specific resources		
Apply correct protocols and procedures when calling on internal or external sites or specialised areas		
Supporting Evidence	Date	Signature
Internal assessment results as per company requirements		
Attendance registers		

Contextualised Workplace Knowledge	Date	Signature
1. Company specific products and price range		
2. Company specific territory		
3. Company specific competitors		
4. Company policies, procedures and protocols		
5. Code of conduct and ethics		

Additional Assignments to be Assessed Externally	Date	Signature
None		