

Title	Apply knowledge of the sales process to sales situations		
Level	3	Credits	6

Purpose	<p>This unit standard is for people entering the sales area. They could be working in a variety of different sales situations.</p> <p>People credited with this unit standard are able to demonstrate knowledge of the sales process, and apply the sales process to sales situations.</p>
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Classification	Retail, Distribution, and Sales > Sales
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Available grade	Achieved
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Guidance Information

- 1 Any relevant Acts, regulations, and bylaws must be complied with during assessment against this standard.
- 2 Definitions

Buyer decision making process is a systematic and measurable approach to the process the buyer may go through in buying a product. This process will typically involve recognising needs and wants, researching the product, using criteria to short list preferred options.

Organisational procedures referred to in this unit standard may include but are not limited to the applicable procedures found in the following: organisational performance guidelines and standards; Government and local body legislation.

Product refers to goods and/or services.

Sales or *selling* refers to creating, building and sustaining mutually beneficial and profitable business through personal and organisational contact and relationships.

Sales process is the systematic and measurable approach to selling a product or service.

Sales related information refers to information relating to customers, competitors and markets that is required to support sales activities.
- 3 The assessor is to ensure that actual sales situations are used as evidence of competency.

Outcomes and performance criteria

Outcome 1

Demonstrate knowledge of the sales process.

Performance criteria

- 1.1 The stages of a sales process are identified and described in terms of their impact on the buyer decision making process.

Range stages of the sales process may include but are not limited to – planning and preparing the sales outcome, finding and qualifying new opportunities, selecting products or services, developing solutions for the customer, presenting findings and recommendations, gaining commitment, delivering what has been sold, managing on-going customer relationships, completing sales data, documentation, administration.

Outcome 2

Apply the sales process to sales situations.

Performance criteria

- 2.1 The stages in the sales process are applied in accordance with organisational procedures.

- 2.2 Sales documentation is completed from initial enquiry through to fulfilled in accordance with organisational procedures.

Range sales documentation may include but is not limited to – customer account, applications, credit applications, order docket, approval forms, warranty applications, competition entry forms.

- 2.3 Sales support resources that provide assistance with sales processing are identified and applied in accordance with organisational procedures.

Range sales support may include but is not limited to – sales support team, estimating, tender specialist, administrative assistant, email, internet, intranet, telephone.

- 2.4 Sales data is input, stored and accessed in the organisation's information system in accordance with organisational procedures.

Range sales data may include but is not limited to – compliance requirements, audit requirements, provision of customer service, confidential documents, marketing, customer tracking, customer relationship management (CRM) digital database, reporting requirements, client profile, order details, order history.

- 2.5 Sales related information and recommendations are provided and documented for reporting requirements in accordance with organisational procedures.

Planned review date	31 December 2027
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	18 March 2011	31 December 2015
Revision	2	14 November 2012	31 December 2024
Review	3	8 December 2016	31 December 2024
Review	4	26 January 2023	N/A

Consent and Moderation Requirements (CMR) reference	0112
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact Ringa Hora Services Workforce Development Council qualifications@ringahora.nz if you wish to suggest changes to the content of this unit standard.