

41004 Apply sales support techniques and relationship management to provide a quality customer experience

Kaupae Level	4
Whiwhinga Credit	10
Whāinga Purpose	<p>This skill standard is intended for individuals who support customer engagement and relationship management in the business events sector, and who are developing practical skills in sales support, customer service, and contract administration.</p> <p>Learners will be able to apply product knowledge and sales support techniques to deliver customer service, build and maintain effective business relationships, and produce a standard contract that reflect the intent of organisational requirements and procedures and support safe and compliant business operations.</p> <p>This skill standard can be used in programmes leading to the New Zealand Certificate in Business Events (Level 4) [Ref: 5452] and may also be included in other qualifications or micro-credentials where sales support and relationship management are key components of event delivery.</p>

Hua o te ako me Paearu aromatawai | Learning outcomes and assessment criteria

Hua o te ako Learning outcomes	Paearu aromatawai Assessment criteria
1. Apply product knowledge and sales support techniques to deliver customer service that enhances customer satisfaction.	a. Demonstrate effective sales support techniques and customer service skills.
	b. Contribute to completing a site inspection for an event, and report findings and recommendations for suitability.
	c. Demonstrate effective communication skills, produce effective sales communications, and manage customer interactions professionally.
	d. Resolve customer issues and complaints professionally to support a quality customer experience.
	e. Generate and analyse sales and customer reports from CRM or other systems.

Hua o te ako Learning outcomes	Paearu aromatawai Assessment criteria
2. Build and maintain effective business relationships with clients and stakeholders.	a. Apply skills and relationship management strategies to build and maintain relationships with clients, responsively adjusting approaches.
	b. Use effective questioning and listening techniques to understand and elicit client circumstances and needs
	c. Create and maintain records in relation to customer interactions.
3. Produce a standard contract that reflects intent of organisational requirements and procedures, and supports safe and compliant business operations.	a. Produce a standard contract using an approved template, including its purpose, key elements, and associated legal or operational requirements.
	b. Apply relevant organisational procedures, safety considerations, and compliance requirements during contract development, with potential issues identified and addressed.

Pārongo aromatawai me te taumata paearu | Assessment information and grade criteria

Assessment specifications:

Assessment against this standard must take place in a business events related workplace when appropriate situations arise, or in a provider environment if simulated workplace conditions are able to be provided that reflect the standards of a business events related workplace.

Learning and assessment should, where appropriate, demonstrate indigenous values of manaakitanga, whanaungatanga and kaitiakitanga, and may thread te reo Māori and tikanga Māori learning throughout as appropriate.

Definitions

Business events refer to organised gatherings where professionals come together to network, share knowledge, experiences and discuss/explore business opportunities. These events can take many forms, such as conferences, incentives, trade shows, seminars, workshops, meetings, and hybrid events.

Customer Relationship Management (CRM) refers to a system that helps businesses manage all interactions with customers and prospects to improve relationships, streamline processes, and drive growth.

Tech Stack RFP (Request for Proposal) refers to a formal document used by event organisers to invite proposals from technology vendors for the tools and systems required to plan, manage, and deliver a business event. It outlines the event's objectives, technical and operational needs, and evaluation criteria, and seeks integrated technology solutions, such as registration platforms, virtual event tools, and engagement apps, that support a seamless and compliant event experience.

Ngā momo whiwhinga | Grades available

Achieved

Ihirangi waitohu | Indicative content

Sales fundamentals and product knowledge

- Basics of sales, including defining sales and its importance.
- Asking questions, active listening – techniques for asking open-ended questions and active listening.
- Upselling and cross-selling techniques.
- Lead generation techniques, marketing strategies (digital and copywriting); consultative sales and solution finding.
- Basic administrative tasks such as producing sales communications, email follow-up and note-taking.
- Time management, stress, and resilience.
- Understanding product features and benefits.
- Tech stack RFPs to find the right hybrid technology to support the event.
- Competitor awareness and industry terminology.
- Use of digital tools – understanding and utilising Customer Relationship Management (CRM) or other systems for managing sales and customer relationships; data entry, report generation, and analysis.

Site inspections

- Researching information on venues in terms of their ability to meet event requirements.
- Compilation of selection of venues, and evaluation against criteria, such as capabilities, limitations, standards, budget, location, security, infrastructure, accessibility, and facilities.
- Conducting effective site inspections and how to report findings.

Customer service

- Principles of customer service and their importance.
- Effective communication techniques, including verbal and non-verbal communication.
- Strategies for handling customer complaints and resolving issues.
- Understanding customer motivation.
- Techniques for managing customer expectations and ensuring satisfaction.

Relationships

- Customer interactions – client meetings, discovery calls.
- Managing and fostering business relationships.
- Identify nature of and importance of relationship management in business.
- Use effective questioning and listening techniques to understand and elicit customer circumstances and needs.
- Techniques for building and maintaining business relationships, and responsively adjusting approaches.
- Future-proof communication methods and tools for relationship management.
- Creating and maintaining records in relation to customer interactions.

Contracts and procedures

- Reading and interpreting contracts – purpose, key terms, deliverables, obligations, risks, and necessary adjustments.
- Awareness of legal and operational implications (e.g. non-compliance, liability, dispute risks).
- Processes for developing, reviewing, and managing contracts using organisational templates.
- Development and implementation of Standard Operating Procedures (SOPs) with awareness of contextual variation.
- Navigating relevant regulations and legal considerations, organisational procedures, safety considerations, compliance requirements, and best practices (e.g. privacy, employment, liability, Health and safety regulations).

Rauemi | Resources

Legislation relevant to this skill standard may include but is not limited to:

- Consumer Guarantees Act 1993.
- Credit Contracts and Consumer Finance Act 2003.
- Contract and Commercial Law Act 2017.
- Fair Trading Act 1986.
- Harmful Digital Communications Act 2015.
- Health and Safety at Work Act 2015.
- Human Rights Act 1993.
- Privacy Act 2020.
available from <https://www.legislation.govt.nz>.
- Te Tiriti o Waitangi Programme Development – supporting information available at [Home - Ringa Hora programme guidance documents for providers](#).

Pārongo Whakaū Kounga | Quality assurance information

Ngā rōpū whakatau-paerewa Standard Setting Body	Ringa Hora Services Workforce Development Council
Whakaritenga Rārangi Paetae Aromatawai DASS classification	Service Sector > Tourism > Business Events
Ko te tohutoro ki ngā Whakaritenga i te Whakamanatanga me te Whakaōritenga CMR	0112

Hātepe Process	Putanga Version	Rā whakaputa Review Date	Rā whakamutunga mō te aromatawai Last date for assessment
Rēhitatanga Registration	1	30 October 2025	N/A
Kōrero whakakapinga Replacement information	N/A		
Rā arotake Planned review date	31 December 2030		

Please contact Ringa Hora Services Workforce Development Council at qualifications@ringahora.nz to suggest changes to the content of this skill standard.