

<b>Title</b>	<b>Establish and develop sales client relationships</b>		
<b>Level</b>	<b>4</b>	<b>Credits</b>	<b>5</b>

<b>Purpose</b>	People credited with this unit standard are able to: identify potential clients, communicate with clients, respond to client requirements, and maintain and develop client relationships.
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<b>Classification</b>	Retail, Distribution, and Sales > Sales
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<b>Available grade</b>	Achieved
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### Guidance Information

- 1 This unit standard may be assessed against in a work-based environment, or in an education and training environment if simulated business conditions are provided, or in a combination of both environments.
- 2 Definitions  
*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 or services.
- 3 Legislation relevant to this unit standard includes but is not limited to: Consumer Guarantees Act 1993, Fair Trading Act 1986, Privacy Act 2020, Credit Contracts and Consumer Finance Act 2003, Contract and Commercial Law Act 2017.
- 4 Evidence is required for development of relationships with two different clients.

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### Outcomes and performance criteria

#### Outcome 1

Identify potential clients.

#### Performance criteria

- 1.1 Potential clients are identified in accordance with organisational procedures.

- 1.2 Factors affecting client relationships are identified for specific clients.
- Range factors may include but are not limited to – market type; product type; existing relationship; personal, social, psychological, cultural, behavioural, organisational factors, role, authority, motivators, decision-making processes, timing; evidence of five factors is required.
- 1.3 Communication strategies consistent with identified factors are developed for specific clients in accordance with organisational procedures.
- Range may include but is not limited to – direct marketing, campaigning, targeting, mail-out, personal contact, internet, telephone.

## Outcome 2

Communicate with clients.

### Performance criteria

- 2.1 Components of effective communication are identified and applied for specific sales situations.
- Range components may include but are not limited to – creating a suitable environment, timeliness, greeting, building rapport, building relationship, negotiation, product knowledge, use of sales aids, identification of needs and motivation, overcoming resistance, problem solving, conflict resolution, maintaining a win-win attitude, use of closing strategies, reaching agreement, confirmation of requirements, documentation, giving and receiving feedback, follow-up; evidence of the application of five components is required;

## Outcome 3

Respond to client requirements.

### Performance criteria

- 3.1 The process of identifying client requirements for specific products is carried out in accordance with organisational procedures.
- Range processes may include but are not limited to – clarifying requirements, understanding client perspectives, identifying product gaps, maximising benefits, meeting needs, handling unrealistic expectations, negotiating, overcoming objections, overcoming resistance, resolving conflicts, solving problems, using closing strategies, compliance with organisational procedures, building client loyalty, developing partnerships; evidence of five processes is required.

- 3.2 Client requirements for specific products are established in accordance with legislative requirements and organisational procedures.
- 3.3 Client requirements are met in accordance with criteria established with client and organisational procedures.

#### Outcome 4

Maintain and develop client relationships.

#### Performance criteria

- 4.1 Client relationships are maintained in accordance with organisational procedures.
- Range may include but is not limited to – communication, feedback, product support, positive attitude, effective use of resources.
- 4.2 Client relationships are developed in accordance with organisational procedures.
- Range may include but is not limited to – contacting, informing, offering extra benefits, monitoring client satisfaction, recognising client value.
- 4.3 Opportunities for providing further products to clients are identified and followed up in accordance with organisational procedures.

<b>Planned review date</b>	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	21 March 1997	31 December 2018
Revision	2	3 May 2002	31 December 2018
Revision	3	20 January 2006	31 December 2018
Review	4	20 June 2008	31 December 2018
Review	5	8 December 2016	31 December 2021
Revision	6	29 March 2018	31 December 2024
Review	7	26 January 2023	N/A

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

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**Comments on this unit standard**

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