

Title	Develop, implement, and maintain sales related services		
Level	5	Credits	10

Purpose	People credited with this unit standard are able to: identify prospective clients and establish their requirements; establish and manage client relationship database; service and administer client base; and evaluate and develop sales business.
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Classification	Retail, Distribution, and Sales > Sales
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Available grade	Achieved
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Guidance Information

- 1 All performance criteria are to be carried out in accordance with organisational procedures.
- 2 Evidence is required of competent performance in a sales management context.
- 3 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.
- 4 **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 and/or services in this unit standard.
- 5 Legislation relevant to this unit standard includes but is not limited to: Consumer Guarantees Act 1993, Fair Trading Act 1986, Privacy Act 1993, Credit Contracts and Consumer Finance Act 2003, Contract and Commercial Law Act 2017.

Outcomes and performance criteria

Outcome 1

Identify prospective clients and establish their requirements.

Performance criteria

- 1.1 Contacts and networks are developed to identify prospective clients.

1.2 Prospective clients are evaluated in terms of potential business.

Range evaluation criteria may include but are not limited to – relevance of products; ability to meet requirements; product delivery capability, previous sales, potential sales, growth opportunities, client profitability, client financial stability; evidence of four evaluation criteria is required.

1.3 Requirements of prospective clients are established through communication.

Range communication may include but is not limited to – provision of product information, identification of requirements, confirmation of requirements.

Outcome 2

Establish and manage client relationship database.

Performance criteria

2.1 Required operating parameters of client relationship database are established.

Range required operating parameters may include but are not limited to – information, technology, access, security, administration, maintenance, communication, relevance for nature of the sales operation, meeting needs of current and potential users.

2.2 Client relationship database is created and maintained to meet established requirements.

Range may include but is not limited to – ease of access, use and maintenance; efficient recording of client and sales information; accurate and current information; security.

2.3 Client relationship database is evaluated for effectiveness.

Range may include but is not limited to – efficiency, accuracy, relevance for organisation and clients, cost effectiveness, usefulness, ease of use, maintenance, value, fit with organisational policies and procedures.

Outcome 3

Service and administer client base.

Performance criteria

3.1 Servicing requirements for client base are established.

Range may include but is not limited to – meeting requirements of management, sales staff, clients, suppliers, distributors; fit with organisational objectives, priorities, targets, policies and procedures; monitoring of workloads, account potential, resources, situations.

3.2 Operating procedures for servicing client base are established.

Range procedures include but are not limited to –planning; consulting; organising; coordinating; monitoring; reviewing.

3.3 Client base is serviced.

Outcome 4

Evaluate and develop sales business.

Performance criteria

4.1 Product mix is evaluated.

Range may include but is not limited to – existing products, new products, competitor's products, diversification, market trends, client demand, client feedback.

4.2 Sales activities are evaluated.

Range may include but is not limited to – image, goals, planning, prospecting, consultation, client profile, sales information, marketing strategies, sales strategies, communication, processing of sales, administration, follow-up, relationships.

4.3 Sales team is evaluated.

Range may include but is not limited to – image, mix, roles, presentation skills, selling skills, qualifications, training, communication skills, relationships, development.

4.4 Sales business is developed.

Range may include but is not limited to – developments in product mix, sales activities, sales team.

This unit standard is expiring. Assessment against the standard must take place by the last date for assessment set out below.

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	31 December 2024

Consent and Moderation Requirements (CMR) reference	0225
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.