

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 tasks 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.

Planned review date	31 December 2021
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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	N/A

Consent and Moderation Requirements (CMR) reference

0225

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact ServicelQ qualifications@ServicelQ.org.nz if you wish to suggest changes to the content of this unit standard.