

Title	Produce and present sales proposals		
Level	5	Credits	10

Purpose	People credited with this unit standard are able to: establish objectives for sales proposals; produce sales proposals; and present sales proposals.
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Classification	Retail, Distribution, and Sales > Sales
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Available grade	Achieved
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Guidance Information

- 1 Evidence is required of competent performance in a sales management context.
- 2 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.
- 3 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 services.
- 4 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.
- 5 Evidence is required for production and presentation of sales proposals for two different clients.

Outcomes and performance criteria

Outcome 1

Establish objectives for sales proposals.

Performance criteria

- 1.1 Background information for potential clients is identified.
- Range categories of background information may include but are not limited to – contacts, personal and business profile, organisational qualities and culture, current practices, problems with competing products, demand for product, product information, product support; product quality, product price, product promotion, product distribution preferences, buying process preferences; evidence of five categories is required.
- 1.2 Client information is evaluated in terms of implications for sales proposals.
- Range may include but is not limited to – market demand, profitability, competition, ability to meet client requirements, fit with the organisation's strategic objectives, ongoing business.
- 1.3 Sales objectives are developed for specific clients.
- Range may include but is not limited to – specific, measurable, achievable, results-focused, time bound, linked to organisation's strategic objectives.
- 1.4 Sales objectives are assessed in terms of implications for the development and presentation of sales proposals.
- Range implications may include but is not limited to – potential conflicts, potential constraints, resources, budget, ability to meet client needs and expectations, client buying motives and behaviours, competitors, economic environment, legal and regulatory environment, time frames; evidence is required for six implications.

Outcome 2

Produce sales proposals in accordance with organisational procedures.

Performance criteria

- 2.1 Potential sales strategies are evaluated in terms of meeting of client requirements and achievement of sales objectives.
- 2.2 Sales strategies are selected.
- Range consistent client requirements, consistent with sales objectives.
- 2.3 Sales strategies for specified clients are created.

2.4 Sales proposals for specified clients are developed.

Range may include but is not limited to – consultation, targeting, drafting, formatting, budgeting, checking, agreement, approval.

Outcome 3

Present sales proposals in accordance with organisational procedures.

Performance criteria

3.1 Potential presentation techniques are evaluated and selected.

Range presentation techniques may include but are not limited to – sales objectives, presentation objectives, client preferences, style and expertise of the presenter, resources, quality standards.

3.2 Sales proposal is presented.

Range may include but is not limited to – creating a suitable environment, establishing credibility, confirming requirements, explaining product features and benefits, demonstrating product features and benefits, presentation aids, overcoming resistance, conflict resolution, maintaining a win-win attitude, sales pitch.

3.3 Sales-closing techniques are demonstrated.

Range may include but is not limited to – encouraging and confirming commitment or decision to purchase.

3.4 Post-sale follow-up processes are presented.

Range processes may include but are not limited to – supply of products, invoicing, monitoring client satisfaction, monitoring product performance, resolving problems, offering add-on sales, maintaining client relationships, developing future business; evidence of four processes is required.

3.5 Effectiveness of the presentation of sales proposal is evaluated and any areas for improvement are identified.

3.6 Methods for improving effectiveness of presentation of sales proposals are implemented.

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.