

<b>Title</b>	<b>Provide sales administration and support services</b>		
<b>Level</b>	<b>5</b>	<b>Credits</b>	<b>7</b>

<b>Purpose</b>	People credited with this unit standard are able to: administer sales procedures; provide administrative support to the sales team; manage communications for the sales team; and report on activities of the sales team.
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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 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.  
*Sales administration and support services* could include administration and support related to staff, contractors, clients, sales activities, resources, information, money, credit, safety, communication, quality, compliance with organisational procedures, compliance with legislative requirements.
- 4 Legislation relevant to this unit standard includes but is not limited to: Consumer Guarantees Act 1993, Fair Trading Act 1986, Credit Contracts and Consumer Finance Act 2003, Contract and Commercial Law Act 2017, Privacy Act 1993, Employment Relations Act 2000, Health and Safety at Work Act 2015, Human Rights Act 1993.

### Outcomes and performance criteria

#### Outcome 1

Administer sales procedures in accordance with organisational procedures.

**Performance criteria**

1.1 Sales procedures are administered.

Range may include but is not limited to – prioritising, scheduling, recording, monitoring, communicating, training, making payments, receiving payments, controlling credit, reporting, reviewing, evaluating effectiveness.

1.2 Sales procedures are documented.

Range documentation may include but is not limited to – minute taking, note taking, audio-recording, use of computer software, use of customer relationship management system, use of communication technology, use of mobile devices, formatting, checking, filing, file management; evidence is required for the method of documentation specific to the organisational procedure.

1.3 Administration of sales procedures is evaluated and upgraded to facilitate efficient operation of the business.

**Outcome 2**

Provide administrative support to the sales team.

**Performance criteria**

2.1 Administration needs of the sales team are identified and established in relation to sales activities and operations.

Range may include but is not limited to – support, encouragement, communication, time management, networking, resources, information, documentation, reports.

2.2 Administration support services are provided to meet the needs of the sales team in accordance with organisational procedures.

2.3 Administrative support systems and procedures are evaluated and upgraded to facilitate efficient operation of the business.

**Outcome 3**

Manage communications for the sales team in accordance with organisational procedures.

**Performance criteria**

3.1 Communications requirements of the sales team are identified and provided.

Range may include but is not limited to – telecommunications, email, smart-phone technology, website, social media, meetings, paper-based communications.

- 3.2 Impacts, benefits, and costs of new communication technologies are identified and evaluated in terms of their relevance for sales activities and operations.
- 3.3 Communication systems and procedures are evaluated and upgraded to facilitate efficient operation of the business.
- 3.4 Training opportunities are identified and implemented to facilitate effective use of communication systems and technologies.

#### **Outcome 4**

Report on activities of the sales team in accordance with organisational procedures.

#### **Performance criteria**

- 4.1 Reporting requirements are established.
- Range may include but is not limited to – objectives content, format, reporting periods.
- 4.2 Information from sales activities and operations is gathered and recorded.
- Range may include but is not limited to – image, planning, prospecting, consultation, client profile, products, sales information, marketing strategies, sales strategies, communication, relationships, makeup of sales team, skills and qualifications of sales team, processing of sales, sales results, administration, support, follow-up; evidence of six is required.
- 4.3 Reports are produced.
- 4.4 Reporting systems and procedures are evaluated and upgraded to facilitate efficient operation of the business.

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**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

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