

<b>Title</b>	<b>Establish, implement, and evaluate personal selling strategies to achieve targeted results</b>		
<b>Level</b>	<b>5</b>	<b>Credits</b>	<b>10</b>

<b>Purpose</b>	People credited with this unit standard are able to: establish personal selling objectives; identify and implement strategies to achieve personal selling objectives; and evaluate effectiveness of personal selling strategies and implement methods for improvement.
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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 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.  
*Personal selling strategies* may include but are not limited to – direct marketing, campaigning, targeting, mail-out, personal contact, internet selling, telephone selling, creating a suitable environment, timeliness, building rapport, building relationships, clarifying requirements, understanding customer perspectives, identifying product gaps, use of sales aids, maximising benefits, identification of needs and motivation, meeting needs, handling unrealistic expectations, negotiating, overcoming objections, overcoming resistance, solving problems, resolving conflicts, use of closing strategies, maintaining a win-win attitude, reaching agreement, confirming requirements, documentation, giving and receiving feedback, follow-up, compliance with organisational procedures, building client loyalty, developing partnerships, complying with legislation.  
*Product* refers to goods or services.
- 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.

6 Evidence is required for selling to different clients on two occasions.

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## Outcomes and performance criteria

### Outcome 1

Establish personal selling objectives.

#### Performance criteria

1.1 Personal selling goals are established.

Range may include but is not limited to – sales volume, market share, profit, product or brand recognition, customer relationships, new business, repeat business, coverage, targets.

1.2 Objectives to achieve personal selling goals are established and documented.

Range may include but is not limited to – specific, measurable, achievable, results-focused, time bound, linked to organisation's strategic marketing, production, management, team, territory or centre objectives.

### Outcome 2

Identify and implement strategies to achieve personal selling objectives.

#### Performance criteria

2.1 Personal selling strategies are identified and evaluated.

Range may include but is not limited to – market trends, customer requirements.

2.2 Implications of competitive environment on personal selling strategies are identified and evaluated.

Range may include but is not limited to – markets, customers, products, legislation, administration, sales approaches, personal motivation, incentives, training and development, skills of sales team, circumstances of sales team; evidence of five is required.

2.3 Requirements and expectations of individual customers are identified and suitable selling strategies are implemented.

Range may include but is not limited to – sales volume, market share, profit, product or brand recognition, customer service, customer relationships, new business, repeat business, coverage, motivation, professionalism, achievement of targeted results.

**Outcome 3**

Evaluate effectiveness of personal selling strategies and implement methods for improvement.

**Performance criteria**

3.1 Effectiveness of personal selling strategies is evaluated.

Range processes for measuring effectiveness may include but are not limited to – observation, monitoring of sales, self-evaluation, feedback from clients, manufacturers, suppliers, staff.

3.2 Methods for improving effectiveness of personal selling strategies are implemented.

Range methods may include but are not limited to – setting development objectives, upskilling, training, coaching, motivating, encouraging, providing resources, changing strategies, adjusting procedures, providing incentives, seeking feedback, providing professional advice and assistance, linking with mentor.

**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

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