

<b>Title</b>	<b>Structure, develop, and manage sales territories</b>		
<b>Level</b>	<b>6</b>	<b>Credits</b>	<b>7</b>

<b>Purpose</b>	People credited with this unit standard are able to: identify sales territories and establish sales objectives; evaluate and select structures for sales territories; develop strategies for sales territories; delegate sales territory responsibilities and accountabilities; and evaluate sales territory performance.
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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 Definitions  
*Manage* may include but is not limited to – self-management, teamwork, planning, communication, consultation, negotiation, compromise, direction, leadership, coordination, control, respect, ethics, supervision, monitoring, evaluation, feedback, reporting.  
*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 or services.  
*Territory* refers to a system of classification of current and potential customers. Territories may include but are not limited to classifications based on – geography, products, product life cycle, customers, personnel, sales, profitability, industry sector, season, resources.
- 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.
- 5 Evidence is required for development and management of sales territories in two different contexts.

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## Outcomes and performance criteria

### Outcome 1

Identify sales territories and establish sales objectives.

#### Performance criteria

1.1 Factors influencing potential sales territories are identified.

Range factors may include but are not limited to – new or existing customers, competition, access, location, image, expectations, openness to sales strategies, customer loyalty, brand loyalty, price sensitivity, profitability, fit with organisation and its products, servicing requirements, market share, quotas; evidence of seven factors is required.

1.2 Ability of organisation to service specified sales territories is evaluated.

Range may include but is not limited to – expertise of sales team, experience of sales team, ability to meet customer needs, ability to counter competition, efficiency of management and administration, cost effectiveness, profitability, establishment costs, overheads, ongoing costs, resources; evidence of six is required.

1.3 Sales territories for specified markets are identified and established.

Range may include but is not limited to – consultation, negotiation, documentation, presentation, adjustment, approval, budgeting.

1.4 Sales objectives for selected territories are developed and adopted.

Range may include but is not limited to – specific, measurable, achievable, results-focused, time bound, linked to organisation's overall objectives, consistent with organisational marketing and sales strategies, matching requirements of target markets.

### Outcome 2

Evaluate and select structures for sales territories.

**Performance criteria**

- 2.1 Strengths and weaknesses of alternative territory structures are identified and evaluated.
- Range may include but is not limited to – evaluation of markets, products, sales, nature of the sales operation, profitability, personnel, resources, administration, management, relationships, responsibilities, accountabilities, distribution, legislative requirements.
- 2.2 Territory structure for specified markets is selected and established.
- Range may include but is not limited to – meeting of customer needs, meeting of organisational needs, efficiency, cost effectiveness, consistency with achievement of sales objectives, suitability for products, skills of sales team, ease of management, ease of administration, meet legislative requirements.

**Outcome 3**

Develop strategies for sales territories.

**Performance criteria**

- 3.1 Strategies for effective performance of sales territory are developed.
- Range strategies may include but are not limited to – prospecting, serving customers, building customer relationships, management, communication, product storage, product supply, product distribution, servicing territory, managing public relations and market perceptions, receiving payments, invoicing, customer follow-up and support, identification and development of new business maximising the effective use of the sales team; evidence for six strategies is required.
- 3.2 Territory strategies are developed to integrate individual territory activities with organisational sales operations.

**Outcome 4**

Delegate sales territory responsibilities and accountabilities.

## Performance criteria

- 4.1 Responsibilities and accountabilities for individual sales territories are identified and delegated.

Range may include but is not limited to – meeting of customer needs, meeting of organisational needs, efficiency, cost effectiveness, consistency with achievement of sales objectives, suitability for products, fit with skills, motivation and workload of personnel; ease of management; ease of administration; meeting of legislative requirements.

## Outcome 5

Evaluate sales territory performance.

## Performance criteria

- 5.1 Procedures for measuring performance and evaluating sales territories are identified and implemented.

Range measuring methods may include but are not limited to – observation, research, monitoring of sales, analysis of results, self-evaluation, feedback from customers, manufacturers, suppliers, staff; evidence of the use of four measuring methods is required; evaluation criteria may include but are not limited to – targets, products, approaches, structures, personnel, focus, resources, incentives, value to customers, responsiveness, achievement of objectives, profitability, variations, implications; evidence of the use of four evaluation criteria is required.

- 5.2 Procedures for improving performance of sales territories are implemented.

Range procedures may include but are not limited to – review of approaches, review of structures, review of objectives, review of resources, review of personnel, setting development objectives, providing resources, changing strategies, adjusting procedures, providing incentives, seeking feedback, providing professional advice and assistance; evidence of six procedures is required.

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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>.