

Title	Coordinate, develop, and manage the sales team to achieve objectives		
Level	6	Credits	10

Purpose	People credited with this unit standard are able to: develop objectives for sales team; evaluate and select structures for sales team; develop sales strategies for sales team; coordinate, monitor, and control activities of sales team; evaluate performance of sales team.
----------------	--

Classification	Retail, Distribution, and Sales > Sales
-----------------------	---

Available grade	Achieved
------------------------	----------

Guidance Information

- 1 Evidence is required of competent performance in a sales management context.
- 2 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.
- 3 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.
- 4 Evidence is required for coordination, development and management of a sales team in two different contexts.

Outcomes and performance criteria

Outcome 1

Develop objectives for sales team.

Performance criteria

- 1.1 Procedures for development of objectives for sales team are identified in accordance with organisational procedures.
- Range may include but is not limited to – planning, consultation, negotiation, documentation, presentation, adjustment, approval.
- 1.2 Factors influencing achievement of objectives by sales team are identified in accordance with organisational procedures.
- Range may include but is not limited to – new or existing customers, strategies, competition, fit with organisation and its products, market share, brand loyalty, legislation.
- 1.3 Objectives for sales team are developed in accordance with organisational procedures.
- Range may include but is not limited to – specific, measurable, achievable, results-focused, time bound, linked to organisation's overall objectives.
- 1.4 Objectives for sales team is matched with the requirements of customers.
- Range may include but is not limited to – products, sales approaches, sales volume, customer service, relationships, strategies, incentives, timing, coverage, responsiveness.
- 1.5 Objectives for sales team are agreed to and documented in accordance with organisational procedures.

Outcome 2

Evaluate and select structures for sales team in accordance with organisational procedures.

Performance criteria

- 2.1 Strengths and weaknesses of alternative sales team structures are evaluated.
- Range may include but is not limited to – evaluation of markets, products, sales, nature of the sales operation, policies and procedures, goals and objectives, legislative requirements.
- 2.2 Requirements of roles, functions and activities of sales team are identified.
- Range may include but are not limited to – identifying desirable characteristics, specifying competencies, job analysis, job design, job description, person specification.

2.3 Structure of sales team is determined and documented.

Range includes but is not limited to – relevant to established objective, maximising human resources, matching customer requirements, matching requirements of other business functions.

2.4 Structure of sales team is communicated to relevant parties.

Range may include but is not limited to – management, sales team, other business functions, suppliers, customers, stakeholders.

Outcome 3

Develop sales strategies for sales team in accordance with organisational procedures.

Performance criteria

3.1 Capability of sales team to achieve agreed objectives is evaluated.

Range may include but is not limited to – skills, experience, motivation and preferences of the sales team, costs, overheads, resources.

3.2 Strategies for effective performance of sales team are developed.

Range may include but is not limited to – prospecting, scheduling, location, selling, meeting customer needs, sales team feedback, training, reporting, evaluating.

Outcome 4

Coordinate, monitor, and control activities of sales team.

Performance criteria

4.1 Responsibilities and accountabilities for activities of sales team are assigned in terms of agreed objectives.

Range may include but is not limited to – prospecting, marketing, administration of client base, scheduling and making sales calls, achievement of sales volumes and product targets, communication, development of new business, management of customer relations, reporting.

4.2 Activities of sales team are monitored in terms of compliance with policies and procedures and achievement of agreed objectives.

Range may include but is not limited to – observation, results, profitability, customer relationships, feedback, performance management.

4.3 Activities of sales team are monitored in terms of customer satisfaction, relevance for the sales environment, and ongoing business development.

4.4 Activities of sales team are coordinated and controlled to ensure compliance with policies and procedures, achievement of agreed objectives, customer satisfaction, relevance for the sales environment and ongoing business development.

Range may include but is not limited to – leadership, problem solving, communication, flexibility, adjustment, re-orientation, responsiveness.

Outcome 5

Evaluate performance of sales team in accordance with organisational procedures.

Performance criteria

5.1 Procedures for measuring performance of sales team are identified.

Range may include but is not limited to – observation; research; monitoring of sales; analysis of results; self-evaluation; feedback from customers, manufacturers, suppliers, staff.

5.2 Performance of sales team is evaluated.

Range may include but is not limited to – targets, products, approaches, structures, personnel, focus, resources, incentives, value to customers, responsiveness, achievement of objectives, profitability, variations, implications.

5.3 Procedures for improving performance of sales team are implemented.

Range may include but is not limited to – review of approaches, structures, objectives, resources, personnel.

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>.

This unit standard is expiring