

Title	Apply sales skills and tools to sales situations		
Level	3	Credits	10

Purpose	<p>This unit standard is for people entering the sales area. They could be working in a variety of different sales situations.</p> <p>People credited with this unit standard are able to apply sales skills and tools to sales situations.</p>
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Classification	Retail, Distribution, and Sales > Sales
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Available grade	Achieved
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Guidance Information

- 1 Legislation relevant to this unit standard includes but is not limited to: Consumer Guarantees Act 1993, Credit Contracts and Consumer Finance Act 2003, Fair Trading Act 1986, Privacy Act 2020, Contract and Commercial Law Act 2017, and Unsolicited Electronic Messages Act 2007.
- 2 Definitions

Customer focused refers to the alignment of leadership, processes and people in an organisation to meet or exceed customer expectations. This leads to customer loyalty and advocacy resulting in sustainable profitability.

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 or *selling* refers to creating, building and sustaining mutually beneficial and profitable business through personal and organisational contact and relationships.

Sales skills refer to skills such as managing buyer/seller relationship, call planning, questioning skills, presentation skills, gaining commitment, time management used by the salesperson to obtain a sale.

Sales tools are any instruments that enable the sales process.

Target market refers to the group of potential customers selected for selling and marketing. The groups (market segments) are based on matching the organisation's strengths to the segments that will place the greatest value on these strengths and yield the greatest success for the organisation.

Time management methods are ways for using time available more efficiently.
- 3 The assessor is to ensure that actual sales situations are used as evidence of competency. The sales strategy and qualifying criteria may have been pre-determined and given to the candidate.

Outcomes and performance criteria

Outcome 1

Apply sales skills to sales situations.

Performance criteria

- 1.1 Knowledge of the difference between open and closed questions in a sales situation is demonstrated in terms of their purpose.
- 1.2 Qualifying criteria for a prospective buyer are examined and applied to a specific sales situation.
- Range criteria may include but are not limited to – fit with target market, clearly identified need, desire to buy or change, level of authority for decision, timeframe, budget.
- 1.3 A customer focused questioning strategy is prepared prior to interaction with the customer.
- Range strategy may include but is not limited to – issues, goals, objectives, context, perceptions.
- 1.4 A range of questioning techniques and listening skills are used to determine whether a prospective customer enquiry meets the qualifying criteria.
- Range questioning techniques may include but are not limited to – open, closed, leading, multiple, direct, indirect; listening skills include but are not limited to – attention, recognising tone of voice, summarising, paraphrasing, matching, clarifying, reflecting.
- 1.5 Information received is responded to in a manner that fits the context, subject matter and organisational procedures.
- 1.6 Unreasonable customer requests and prospective enquiries that do not meet qualifying criteria are declined in accordance with organisational procedures.
- 1.7 Methods for creating sales opportunities are identified and implemented in accordance with organisational procedures.
- Range methods may include but are not limited to – up-sell, add-on, repeat business.

Outcome 2

Apply sales tools to sales situations.

Performance criteria

2.1 Tools to obtain referral and repeat business are identified and described in accordance with organisational procedures.

2.2 Tools are used to obtain referral and repeat business in accordance with organisational procedures.

Range tools may include but are not limited to – verbal or written request for referral, incentive offer for referral, social media, register for loyalty program, subscription to database, vouchers for future purchase, use of thank you messages, customer survey, customer relationship management, direct mail, e-newsletter; evidence of one tool to obtain a referral and one tool to obtain repeat business is required.

2.3 The purpose of using a sales pipeline tool for the salesperson and the sales manager is described.

2.4 Time management methods to facilitate efficient use of time in dealing with sales priorities are identified and described in terms of their purpose.

Range methods may include but are not limited to – organising activity to ensure priorities are met, lessening the impact of diversions, minimising the amount of time spent on non-urgent matters.

2.5 A system for effective use of time when dealing with sales priorities is implemented in accordance with organisational procedures.

2.6 Price tools are used to calculate price for a customer in accordance with organisational procedures.

Planned review date	31 December 2027
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	18 March 2011	31 December 2015
Revision	2	14 November 2012	31 December 2021
Review	3	8 December 2016	31 December 2021
Revision	4	29 March 2018	31 December 2025
Review	5	26 January 2023	N/A
Revision	6	25 July 2024	N/A

Consent and Moderation Requirements (CMR) reference	0112
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact Ringa Hora Services Workforce Development Council
qualifications@ringahora.nz if you wish to suggest changes to the content of this unit standard.