

<b>Title</b>	<b>Apply knowledge of the sales process to sales situations</b>		
<b>Level</b>	<b>3</b>	<b>Credits</b>	<b>6</b>

<b>Purpose</b>	<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 demonstrate knowledge of the sales process, and apply the sales process to sales situations in accordance with organisational procedures.</p>
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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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### Explanatory notes

- 1 Any relevant Acts, regulations, and bylaws must be complied with during assessment against this standard.
- 2 Definitions
 

*Buyer decision making process* is a systematic and measurable approach to the process the buyer may go through in buying a product. This process will typically involve recognising needs and wants, researching the product, using criteria to short list preferred options.

*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 and/or services.

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

*Sales process* is the systematic and measurable approach to selling a product or service.

*Sales related information* refers to information relating to customers, competitors and markets that is required to support sales activities.
- 3 The assessor is to ensure that actual sales situations are used as evidence of competency.

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### Outcomes and evidence requirements

#### Outcome 1

Demonstrate knowledge of the sales process.

**Evidence requirements**

1.1 The stages of a sales process are identified and described in terms of their impact on the buyer decision making process.

Range stages of the sales process may include but are not limited to – planning and preparing the sales outcome, finding and qualifying new opportunities, selecting products or services, developing solutions for the customer, presenting findings and recommendations, gaining commitment, delivering what has been sold, managing on-going customer relationships, completing sales data, documentation, administration.

**Outcome 2**

Apply the sales process to sales situations in accordance with organisational procedures.

**Evidence requirements**

2.1 The stages in the sales process are applied.

2.2 Sales documentation is completed from initial enquiry through to fulfilled.

Range sales documentation may include but is not limited to – customer account, applications, credit applications, order docketts, approval forms, warranty applications, competition entry forms.

2.3 Sales support resources that provide assistance with sales processing are identified and applied.

Range sales support may include but is not limited to – sales support team, estimating, tender specialist, administrative assistant, email, internet, intranet, telephone.

2.4 Sales data is input, stored and accessed in the organisation’s information system.

Range sales data may include but is not limited to – compliance requirements, audit requirements, provision of customer service, confidential documents, marketing, customer tracking, customer relationship management (CRM) digital database, reporting requirements, client profile, order details, order history.

2.5 Sales related information and recommendations are provided and documented for reporting requirements.

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<b>Planned review date</b>	31 December 2021
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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	N/A
Review	3	8 December 2016	N/A

<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>.

**Please note**

Providers must be granted consent to assess against standards (accredited) by NZQA, before they can report credits from assessment against unit standards or deliver courses of study leading to that assessment.

Industry Training Organisations must be granted consent to assess against standards by NZQA before they can register credits from assessment against unit standards.

Providers and Industry Training Organisations, which have been granted consent and which are assessing against unit standards must engage with the moderation system that applies to those standards.

Requirements for consent to assess and an outline of the moderation system that applies to this standard are outlined in the Consent and Moderation Requirements (CMR). The CMR also includes useful information about special requirements for organisations wishing to develop education and training programmes, such as minimum qualifications for tutors and assessors, and special resource requirements.

**Comments on this unit standard**

Please contact ServicelQ [qualifications@ServicelQ.org.nz](mailto:qualifications@ServicelQ.org.nz) if you wish to suggest changes to the content of this unit standard.