

Title	Manage a sales territory		
Level	4	Credits	4

Purpose	<p>This unit standard is for people working in 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 manage a sales territory, and evaluate the effectiveness of territory management.</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: Fair Trading Act 1986, Consumer Guarantees Act 1993, Credit Contracts and Consumer Finance Act 2003, Contract and Commercial Law Act 2017, Privacy Act 2020, Unsolicited Electronic Messages Act 2007.
- 2 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.

Prospect is a sales ready qualified lead. This is a potential customer that has been determined to fit the profile of an ideal customer, and has been qualified according to the qualification criteria.

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

Sales territory refers to the segment of the market for which the sales person is responsible, which is commonly defined on a geographic, product type or customer type basis.

Outcomes and performance criteria

Outcome 1

Manage a sales territory.

Performance criteria

- 1.1 The sales territory management plan for contact with customers and prospects is developed in accordance with organisational procedures.

 Range plan includes but is not limited to – present and potential revenue and/or profit, cost of service, probability of success, territory call cycle, product or market or service infiltration strategy, competitive threat, potential obstacles.
- 1.2 The sales territory management plan contains specific actions that are aligned with sales and business targets and strategy.
- 1.3 Use of time is managed and travel time and cost of travel is minimised in accordance with organisational procedures.

 Range use of time includes but is not limited to – important and urgent tasks are prioritised.
- 1.4 Customer contact time is managed to suit customer requirements and ensures the timing gives an advantage over competitors.
- 1.5 The sales territory management plan is implemented in accordance with organisational procedures.

Outcome 2

Evaluate the effectiveness of territory management.

Performance criteria

- 2.1 The effectiveness of territory management is evaluated against the agreed criteria for two consecutive time periods in accordance with organisational procedures.

 Range time period may include but is not limited to – daily, weekly, monthly or quarterly;
 agreed criteria may include but are not limited to – present and potential revenue and/or profit, cost of service, probability of success, territory call cycle, product or market or service infiltration strategy, competitive threat, potential obstacles.

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 2018
Review	2	8 December 2016	31 December 2021
Revision	3	29 March 2018	31 December 2024
Review	4	26 January 2023	N/A

Consent and Moderation Requirements (CMR) reference

0112

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.