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|--------------|---|----------------|----------|
| <b>Title</b> | <b>Develop, submit and evaluate sales proposals</b> |                |          |
| <b>Level</b> | <b>4</b>  | <b>Credits</b> | <b>6</b> |

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| <b>Purpose</b> | <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: develop sales proposals; submit sales proposals; and evaluate sales proposals and draw conclusions about improvements in proposals.</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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### 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, 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.
- 3 The assessor is to ensure that actual sales proposals are used as evidence of competency.

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### Outcomes and performance criteria

#### Outcome 1

Develop sales proposals.

**Performance criteria**

- 1.1 The importance of sales proposals and their relationship to selling is analysed in terms of the characteristics of persuasive sales proposals and ways of constructing persuasive sales proposals.
- 1.2 The prospect's or customer's requirements are clearly stated and agreed and all identified issues requiring clarification are resolved before the proposal is finalised and submitted.
- 1.3 The conditions and constraints required to protect the organisation's interest are included in the proposal.
- 1.4 The level of detail required by the prospect or customer is included in the proposal.

**Outcome 2**

Submit sales proposals.

**Performance criteria**

- 2.1 Proposals are submitted in accordance with organisational procedures.  
  
Range proposals may include but are not limited to – prior approval, enclosure of terms and conditions, organisational format.
- 2.2 Proposals are submitted to the prospect or customer within an agreed timescale in accordance with organisational procedures.
- 2.3 Proposal is followed up and any clarification of information is made to the customer.

**Outcome 3**

Evaluate sales proposals and draw conclusions about improvements in proposals.

**Performance criteria**

- 3.1 Feedback on the sales proposals is obtained by the salesperson from the customer in accordance with organisational procedures.
- 3.2 Feedback on the sales proposals is analysed and evaluated, and measures to improve the quality of proposals are made.

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| <b>Planned review date</b> | 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 2024         |
| Review       | 5       | 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](mailto:qualifications@ringahora.nz) if you wish to suggest changes to the content of this unit standard.