

Title	Develop, submit and evaluate sales proposals		
Level	4	Credits	6

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: develop sales proposals; submit sales proposals; and evaluate sales proposals and draw conclusions about improvements in proposals.</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 1993, 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.

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.

Planned review date	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	31 December 2021
Review	3	8 December 2016	31 December 2021
Revision	4	29 March 2018	N/A

Consent and Moderation Requirements (CMR) reference

0225

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact ServicelQ qualifications@ServicelQ.org.nz if you wish to suggest changes to the content of this unit standard.