

<b>Title</b>	<b>Use prospecting to develop new business and use a sales pipeline effectively</b>		
<b>Level</b>	<b>4</b>	<b>Credits</b>	<b>3</b>

<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: apply methods of sales prospecting; develop professional sales networks; gain access to key decision makers; and apply a sales pipeline to develop new business.</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

- Legislation relevant to this unit standards 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.
- 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.

*Lead* refers to a potential customer that wants to learn more about what you have to sell and has acknowledged it has a business problem that you could help solve.

*Network* refers to an association of individuals having a common interest, formed to provide mutual assistance, helpful information, or the like. Developing a professional network is based on the principles of reciprocity (exchanging things with others for mutual benefit).

*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.

*Prospecting* refers to the process of looking for new customers by converting leads that are generated into potential buyers.

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

*Target markets* refer 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.

- 3 This unit standard must be assessed against in the workplace.
- 4 Evidence is required for two sales prospects.

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## Outcomes and performance criteria

### Outcome 1

Apply methods of sales prospecting.

#### Performance criteria

- 1.1 Different methods of lead generation appropriate for the target market are identified and their purpose outlined.  
  
Range methods may include but are not limited to – telephone calls, email, events, trade fairs, direct mail, networking, referral, advertising, branding, public relations, website, online market research, social media.
- 1.2 Methods and tools for lead generation are applied to the target market to give a consistent and sufficient supply of leads.

### Outcome 2

Develop professional sales networks.

#### Performance criteria

- 2.1 The personal and organisational benefits of developing a professional sales network are explained.
- 2.2 The types and roles of people, and organisations required to enhance the salesperson's network are identified.
- 2.3 The places and forums for professional sales networks are identified.  
  
Range places may include but are not limited to – business meetings, membership and attendance at professional associations and groups, Chamber of Commerce, industry events, social networking online market research, social media.
- 2.4 Professional sales networks are developed to reflect changing organisational and professional needs.

### Outcome 3

Gain access to key decision makers.

#### Performance criteria

- 3.1 The effectiveness of self and customer focused techniques for contacting prospects and key decision makers is analysed.
- 3.2 The different methods and timing of contacting a key decision maker are outlined.
- 3.3 Customer focused methods are used to make contact with and gain access to key decision makers.
- Range methods may include but are not limited to – email, face-to-face introduction, referral, social media, telephone.
- 3.4 Appointments with key decision makers are made at mutually convenient times in accordance with organisational procedures.

### Outcome 4

Apply a sales pipeline to develop new business.

#### Performance criteria

- 4.1 Contact with prospects is tracked and managed to develop new business opportunities in accordance with organisational procedures.
- 4.2 Sales lead and prospect information is recorded for all new business opportunities in the sales pipeline through all stages of new business development in accordance with organisational procedures.
- 4.3 The status and potential of new business opportunities in the sales pipeline is tracked and managed against measurable milestones.
- 4.4 The status of the sales pipeline is applied to determine the future sales activity that is required.

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**This unit standard is expiring. Assessment against the standard must take place by the last date for assessment set out below.**

**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	31 December 2024

**Consent and Moderation Requirements (CMR) reference**

0225

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