

<b>Title</b>	<b>Prepare and conduct sales meetings with prospects or clients</b>		
<b>Level</b>	<b>4</b>	<b>Credits</b>	<b>4</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: prepare for a sales meeting with a prospect or client; conduct a business and customer focused sales meeting with a prospect or client; evaluate the effectiveness of the sales meeting with the prospect or client.</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
 

*Call plan* is a tool designed to help a salesperson prepare for a sales call or sales meeting with a prospective or existing customer. Depending on the complexity of the sale, it could be a simple checklist through to a strategic planning tool.

*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.

*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 meetings are used as evidence of competency.

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## Outcomes and performance criteria

### Outcome 1

Prepare for a sales meeting with a prospect or client.

#### Performance criteria

- 1.1 Participants who can influence the desired outcome of the meeting are identified from within the organisation.
- 1.2 Prior research on the participants of the meeting is undertaken in accordance with organisational procedures.
- 1.3 A call plan is prepared prior to the meeting in accordance with organisational procedures.
- 1.4 The purpose of the meeting is communicated to all participants in accordance with organisational procedures.

### Outcome 2

Conduct a business and customer focused sales meeting with a prospect or client.

#### Performance criteria

- 2.1 The sales meeting is run to an agreed agenda in a logical, efficient and timely manner in accordance with organisational procedures.  
  
Range            may include but is not limited to – face-to-face, phone, teleconference, video conference.
- 2.2 Verbal and non-verbal communication signals are assessed to determine how the meeting is progressing and any corrective actions are responded to in a timely manner.

### Outcome 3

Evaluate the effectiveness of the sales meeting with the prospect or client.

#### Performance criteria

- 3.1 The effectiveness of the meeting is evaluated to determine if the meeting objectives of all the participants were met.
- 3.2 The outcomes of the meeting are recorded in accordance with organisational procedures.

<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

<b>Consent and Moderation Requirements (CMR) reference</b>	0112
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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.