

Title	Prepare and conduct sales meetings with prospects or clients		
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: 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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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

Call plan is a tool designed to help a sales person 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.

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.

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