

<b>Title</b>	<b>Promote goods and/or services over the telephone</b>		
<b>Level</b>	<b>3</b>	<b>Credits</b>	<b>3</b>

<b>Purpose</b>	People credited with this unit standard are able to: prepare for, and promote goods and/or services over the telephone.
----------------	---

<b>Classification</b>	Retail, Distribution, and Sales > Merchandising and Marketing
-----------------------	---

<b>Available grade</b>	Achieved
------------------------	----------

---

### Guidance Information

- 1 Definitions  
*Contact* refers to the recipient of a telephone call promoting goods and/or services.  
*Promotion* refers to the act of heightening a contact's awareness of goods and/or services.  
*Workplace procedures* refer to the applicable procedures found in the following: organisational performance guidelines and standards; manufacturer's procedures and specifications; and Government and local body legislation.
- 2 Legislation relevant to this unit standard includes but is not limited to: Privacy Act, 2020, Consumer Guarantees Act, 1993; Fair Trading Act 1986.
- 3 All tasks are to be carried out in accordance with workplace procedures, the workplace being the enterprise carrying out the work, or delivering the service.
- 4 Evidence is required for four separate telephone promotions.

---

### Outcomes and performance criteria

#### Outcome 1

Prepare for promotion of goods and/or services over the telephone.

#### Performance criteria

- 1.1 Information for promoting goods and/or services is identified and gathered.  

<b>Range</b>	may include but is not limited to – objectives, markets, targets, customers, strategies, product information, timeframes, schedules, conditions, limitations, call plan, planning tool.
--------------	---

1.2 Resources required for promoting goods and/or services are assembled.

Range may include but is not limited to – script, reference materials, product data, customer data, recording mechanism, call plan, planning tool.

## Outcome 2

Promote goods and/or services over the telephone.

### Performance criteria

2.1 Calls are made in accordance with call plan.

2.2 Contact is greeted.

Range may include but is not limited to – standard greeting, script, tone of voice, courtesy, use of correct name, timeliness.

2.3 Contact's permission to explore the promotional situation is obtained and unwilling contacts are farewelled.

2.4 Communication skills for establishing empathy and creating interest are demonstrated.

2.5 Contacts with special needs are identified and accommodated.

Range may include but is not limited to – accommodation for hearing impairment, speech impediment, physical disability, English as a second language.

2.6 Active listening skills are used to identify contact needs and expectations.

Range may include but is not limited to – full attention, open and closed questions, recognising tone of voice, matching, clarifying, reflecting, paraphrasing, summarising, measuring motivation.

2.7 Goods and/or services are described clearly to identify their features and benefits.

2.8 Objections are overcome.

Range may include but is not limited to – listen for clues, ask questions, acknowledge objection, suggest additional benefits, sidetrack.

2.9 Closing strategy is demonstrated.

Range may include but is not limited to – direct close, trial close, alternative close, summary close, make appointment, referral, check records, organise follow-up.

2.10 Documentation is completed accurately and processed.

Range may include but is not limited to – complete and update contact records, register call details, make appointments.

2.11 Promotional call is closed.

Range may include but is not limited to – farewell statement, thank contact, use of contact's name, positive attitude.

2.12 Follow-up is completed.

Range may include but is not limited to – confirm appointment, check customer satisfaction, offer other goods and/or services, provide information, give feedback, seek and record feedback, register progress, modify procedures, refer to others.

<b>Planned review date</b>	31 December 2027
----------------------------	------------------

#### Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	16 June 1993	31 December 2018
Review	2	25 October 1995	31 December 2018
Review	3	24 March 1998	31 December 2018
Revision	4	8 June 1999	31 December 2018
Review	5	20 November 2006	31 December 2018
Review	6	8 December 2016	31 December 2024
Review	7	2 March 2023	N/A

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