

<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.
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<b>Classification</b>	Retail, Distribution, and Sales > Merchandising and Marketing
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<b>Available grade</b>	Achieved
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### Explanatory notes

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

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### Outcomes and evidence requirements

#### Outcome 1

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

#### Evidence requirements

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

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

### Evidence requirements

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 2021
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#### 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	N/A

<b>Consent and Moderation Requirements (CMR) reference</b>	0225
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

#### Please note

Providers must be granted consent to assess against standards (accredited) by NZQA, before they can report credits from assessment against unit standards or deliver courses of study leading to that assessment.

Industry Training Organisations must be granted consent to assess against standards by NZQA before they can register credits from assessment against unit standards.

Providers and Industry Training Organisations, which have been granted consent and which are assessing against unit standards must engage with the moderation system that applies to those standards.

Requirements for consent to assess and an outline of the moderation system that applies to this standard are outlined in the Consent and Moderation Requirements (CMR). The CMR also includes useful information about special requirements for organisations wishing

to develop education and training programmes, such as minimum qualifications for tutors and assessors, and special resource requirements.

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**Comments on this unit standard**

Please contact ServiceIQ [qualifications@ServiceIQ.org.nz](mailto:qualifications@ServiceIQ.org.nz) if you wish to suggest changes to the content of this unit standard.