



**Australian Government**

# **BSBSLS501A Develop a sales plan**

**Release 2**

## BSBSLS501A Develop a sales plan

### Modification History

Release	Comments
Release 2	<p>New release of this Unit with <i>version 7.0 of BSB07 Business Services Training Package</i>.</p> <p>Trade Practices Act replaced with Competition and Consumer Act 2010 in the Required Knowledge AND the statement 'Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended' included in the Guidance information for assessment.</p>
Release 1	Initial release of this Unit.

### Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop a sales plan for a product or service for a team covering a specified sales territory based on strategic objectives and in accordance with established performance targets.

### Application of the Unit

This unit applies to individuals working in a supervisory or managerial sales role who develop a sales plan for a product or service.

### Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

## Pre-Requisites

## Employability Skills Information

This unit contains employability skills.

## Elements and Performance Criteria Pre-Content

Element	Performance Criteria
<i>Elements describe the essential outcomes of a unit of competency.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.</i>

## Elements and Performance Criteria

1. Identify organisational strategic direction	<p>1.1 Obtain and analyse assessment of market needs and <b><i>strategic planning documents</i></b></p> <p>1.2 <b><i>Review previous sales performance</i></b> and successful approaches to identify factors affecting performance</p> <p>1.3 Analyse information on market needs, new opportunities, customer profiles and requirements as a basis for decision making</p>
2. Establish performance targets	<p>2.1 Determine practical and achievable sales targets</p> <p>2.2 Establish realistic time lines for achieving targets</p> <p>2.3 Determine <b><i>measures to allow for monitoring</i></b> of performance</p> <p>2.4 Ensure objectives of the sales plan and style of the campaign are consistent with organisational strategic objectives and corporate image</p>
3. Develop a sales plan for a product	<p>3.1 Describe approaches to be used to meet sales objectives</p> <p>3.2 Identify <b><i>additional expertise</i></b> requirements and allocate budgetary resources accordingly</p> <p>3.3 Identify risks and develop risk controls</p> <p>3.4 Develop advertising and promotional strategy for <b><i>product</i></b></p> <p>3.5 Identify appropriate <b><i>distribution channels</i></b> for product</p> <p>3.6 Prepare a budget for the sales plan</p> <p>3.7 Present documented sales plan to appropriate personnel for approval</p>
4. Identify support requirements	<p>4.1 Identify and acquire staff resources to implement sales plan</p> <p>4.2 Develop an appropriate <b><i>selling approach</i></b></p> <p>4.3 Train staff in the selling approach selected</p> <p>4.4 Develop and assess staff knowledge of product to be sold</p>
5. Monitor and review sales plan	<p>5.1 Monitor implementation of the sales plan</p> <p>5.2 Record data measuring performance versus sales targets</p> <p>5.3 Make adjustments to sales plan as required to ensure required results are obtained</p>

## Required Skills and Knowledge

*This section describes the skills and knowledge required for this unit.*

### Required skills

- communication and negotiation skills to determine sales needs, and to refine and modify sales plans in consultation with relevant organisational personnel
- creativity and innovation skills to develop and evaluate new sales approaches
- research and data collection skills to gather information to develop a sales plan.

### Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination
  - ethical principles
  - consumer protection
  - contract law
  - privacy laws
  - Competition and Consumer Act 2010
- industry, organisation, product
- methods for monitoring sales outcomes
- organisational strategic direction and objectives
- principles and techniques for selling
- statistical techniques for analysing sales and market trends.

## Evidence Guide

*The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.*

<b>Overview of assessment</b>	
<b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b>	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"><li>• development of a sales plan for a product sold by an organisation</li><li>• knowledge of organisational strategic direction and objectives.</li></ul>
<b>Context of and specific resources for assessment</b>	<p>Assessment must ensure:</p> <ul style="list-style-type: none"><li>• access to an actual workplace or simulated environment</li><li>• access to office equipment and resources</li><li>• access to strategic planning and sales documents, data and information.</li></ul>
<b>Method of assessment</b>	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"><li>• analysis of responses to case studies</li><li>• assessment of documented sales plans</li><li>• demonstration of sales plan development techniques</li></ul>
<b>Guidance information for assessment</b>	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.</p>

## Range Statement

*The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.*

<b><i>Strategic planning documents</i></b> may include:	<ul style="list-style-type: none"> <li>• company mission statement</li> <li>• financial records</li> <li>• industry trends</li> <li>• marketing trends</li> <li>• operations plan</li> <li>• product trends</li> <li>• strategic plan.</li> </ul>
<b><i>Reviewing previous sales performance</i></b> may include:	<ul style="list-style-type: none"> <li>• analysis of sales history</li> <li>• consideration of related product strategies</li> <li>• evaluation of competitors' or other companies' approaches</li> <li>• innovative suggestions</li> <li>• marketing research.</li> </ul>
<b><i>Measures to allow for monitoring</i></b> may include:	<ul style="list-style-type: none"> <li>• volume of sales</li> <li>• whether sales targets are met or not</li> <li>• progress towards targets</li> <li>• surveys of potential/existing/previous clients.</li> </ul>
<b><i>Additional expertise</i></b> may include:	<ul style="list-style-type: none"> <li>• designers of materials and displays</li> <li>• media producers</li> <li>• advertising executives.</li> </ul>
<b><i>Products</i></b> may include:	<ul style="list-style-type: none"> <li>• goods</li> <li>• ideas</li> <li>• services.</li> </ul>
<b><i>Distribution channels</i></b> may include:	<ul style="list-style-type: none"> <li>• agents</li> <li>• brokers</li> <li>• industry associations.</li> </ul>
<b><i>Selling approach</i></b> may include:	<ul style="list-style-type: none"> <li>• answers to frequently asked questions</li> <li>• introductory techniques</li> <li>• planned approaches</li> <li>• sales scripts</li> <li>• strategies for handling negative comments.</li> </ul>

## **Unit Sector(s)**

## **Competency field**

Business Development – Sales

## **Co-requisite units**