



Australian Government

Assessment Requirements for FNSSAM402 Implement a sales plan

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- analyse a sales plan to develop suitable promotional and budgetary programs
- implement a sales strategy, including putting appropriate sales training in place and preparing promotional materials
- evaluate and make necessary adjustments to ensure the success of a sales plan.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- analyse marketing techniques and market trends
- describe the range of products and services provided by the organisation
- explain the key requirements of legislation, regulation and codes of practice relating to selling financial products and services
- compare and contrast sales and promotion techniques
- outline types of promotional packages and distribution channels used to promote financial products and services
- describe the key features of training strategies used in sales and marketing
- describe the performance criteria used to measure the success of sales plan implementation.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the sales and marketing field of work and include access to:

- financial services product information
- relevant software system and data
- organisational policy and procedures
- common office equipment, technology, software and consumables.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>