



Australian Government

Department of Education, Employment and Workplace Relations

SITXMPR003A Plan and implement sales activities

Revision Number: 1

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Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit describes the performance outcomes, skills and knowledge required to plan and implement sales activities. It requires the ability to identify and analyse market and customer needs, proactively target current and new customers, plan the operation of sales calls, make calls and prepare sales reports.

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

Operational sales skills are covered in SITTTSL005A Sell tourism products and services.

Application of the Unit

Application of the unit

Planning and implementation of sales activities may relate to the promotion of any product, service or event; a group of products being cooperatively marketed; or even a whole city, region or tourist precinct.

This unit requires the application of planning, organisational and communication skills. This role is generally undertaken by sales and marketing personnel within the service industries who operate autonomously and who are responsible for coordinating a range of sales activities. Managers and owner-operators of small businesses would also undertake this activity.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability skills The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit is packaged will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

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

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Plan sales activities.	<p>1.1 Plan and schedule sales activities for existing and potential customers according to marketing plan or other organisation systems.</p> <p>1.2 Identify, analyse and incorporate appropriate organisation, customer and market <i>information</i> into the sales planning process.</p> <p>1.3 Proactively source prospects and create profiles accordingly.</p> <p>1.4 Estimate potential revenue, based on sound analysis of</p>

ELEMENT	PERFORMANCE CRITERIA
	information and in consultation with appropriate colleagues.
	1.5 Plan activities to maximise opportunities to meet individual and team targets.
	1.6 <i>Establish practical sales call patterns</i> based on analysis of all relevant customer and market information.
2 Prepare for sales calls.	2.1 Make sales call appointments in advance where appropriate.
	2.2 Develop <i>sales call strategies and tactics</i> based on market knowledge, current sales focus and consultation with appropriate operational colleagues.
	2.3 Gather specific <i>information and support materials</i> to support individual sales calls.
3 Make sales calls.	3.1 Make sales calls according to agreed call patterns.
	3.2 Build relationships with customers through the use of effective interpersonal communication styles.
	3.3 Develop customer trust and confidence through the demonstration of personal and professional integrity.
	3.4 Proactively identify and resolve customer issues and problems.
	3.5 Use selling techniques to maximise opportunities to meet and exceed sales targets.
	3.6 Provide current, accurate and relevant information on product features and benefits according to current organisation marketing focus.
	3.7 Encourage feedback from customers and proactively seek market intelligence.
4 Review and report on sales activities.	4.1 Review all activities according to agreed evaluation methods and incorporate results into future sales planning.
	4.2 Prepare sales reports according to required timelines and organisation procedures.
	4.3 Present market intelligence in a manner that provides clear and concise information to those responsible for sales

ELEMENT

PERFORMANCE CRITERIA

and marketing planning.

- 4.4 Share market intelligence with relevant colleagues in a timely fashion.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

The following skills must be assessed as part of this unit:

- sales skills to sell diverse products and services in a range of industry contexts and environments
- planning and organisational skills that relate to the conduct of sales activities
- high-level verbal communication skills, specifically active listening and questioning
- conflict and problem resolution techniques in order to take a lead role in solving ongoing problems
- high-level literacy skills to interpret customer information and market trend information, and to read and prepare sales reports
- high-level numeracy skills to calculate potential sales revenues and create and interpret sales statistics.

The following knowledge must be assessed as part of this unit:

- in-depth knowledge of the principles of selling, sales communication and relationship building
- in-depth product knowledge sufficient to take a proactive sales role
- detailed knowledge of the industry, including structure and interrelationships, industry networks and information sources
- industry and market knowledge appropriate to the sector and organisation, including:
 - in-depth knowledge of distribution and marketing networks, especially those that support the product or service being promoted
 - current customer and market trends, products and service style that would meet particular customer and market requirements and preferences
 - links between sales and other areas of the organisation's operations
- overall structure and content of marketing plans
- role of sales within the overall marketing mix
- broad and working knowledge of the legal liability and implications of consumer legislation and regulations on selling products appropriate to particular industry sectors.

Evidence Guide

EVIDENCE GUIDE

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

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- project or work activities that show the candidate's ability to plan and implement sales activities for a specific business operation and to prepare sales reports
- use of effective communication skills during sales calls
- detailed knowledge of the industry, including structure and interrelationships, industry networks, information sources and distribution and marketing networks
- project or work activities conducted over a commercially realistic period of time so that the planning, analysis and reporting aspects of this unit can be assessed.

Context of and specific resources for assessment

Assessment must ensure:

- that the candidate has accessed a fully equipped office environment using appropriate computers, printers, communication technology, information programs and software to facilitate the processes involved in planning and implementing sales activities
- access to an operation for which products would be promoted or access to comprehensive and sufficient information about that operation to allow the candidate to plan for fully and implement sales activities
- use of marketing plans and operational sales documents, such as sales reports and sales support materials
- interaction with individuals or businesses with a genuine or potential interest in purchasing the product or service.

EVIDENCE GUIDE

Methods of assessment

A range of assessment methods should be used to assess the practical skills and knowledge required to plan and implement sales activities. The following examples are appropriate for this unit:

- evaluation of sales plans and sales results developed and achieved by the candidate
- evaluation of sales reports prepared by the candidate to detail the way in which a sales campaign was planned and implemented and lessons to be learned for future sales activities
- evaluation of sales activities undertaken by the candidate in conjunction with and on behalf of industry operators
- case studies to assess knowledge of how sales activities can be used for specific industry contexts
- written and oral questioning or interview to test knowledge such as structure of the industry, industry interrelationships, distribution networks and legal compliance issues
- review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- SITXMGT002A Develop and implement operational plans
- SITXMGT006A Establish and conduct business relationships
- SITXMPR004A Coordinate marketing activities.

Assessing employability skills

Employability skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts.

Employability skills embedded in this unit should be assessed holistically with other relevant units that make up the skill set or qualification and in the context of the job role.

Range Statement

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 in the performance criteria is detailed below.

Information to be incorporated into the sales planning process may include:

- sales and marketing reports
- financial statistics
- market trends
- competitive activity.

Establishing practical sales call patterns may be affected by:

- specific sales and revenue targets
- call intensity required
- geographic considerations and restraints
- current organisation priorities
- need for administration and reporting time.

Sales call strategies and tactics may include or be based on:

- focus on specific products or offers
- individual customer history
- current sales figures for nominated periods
- response to competitive activity.

RANGE STATEMENT

Information and support materials may include:

- brochures
- tariff sheets
- other handouts
- internet and web pages
- electronic updates
- display material
- giveaways
- incentive material.

Unit Sector(s)

Sector

Cross-Sector

Competency field

Competency field

Marketing and Public Relations