



Australian Government

SITXMPR403 Plan and implement sales activities

Release 2

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Modification History

The version details of this endorsed unit of competency set are in the table below. The latest information is at the top.

Version	Comments
1.2	Correction to mapping to show non equivalence.
1.0	N Replaces and is not equivalent to SITXMPR003A Plan and implement sales activities. Minor adjustments to expression of content to streamline and improve unit. Added innovation, legal, ethical and sustainability to Performance Criteria. Added more on new technologies and media.

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.

Application of the Unit

This unit applies to all industry sectors, and to individuals taking responsibility for coordinating sales activities within the parameters of an established sales strategy. People working independently with limited supervision undertake this role. This could include sales and marketing personnel or managers and owner-operators of small businesses.

Licensing/Regulatory Information

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

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Not applicable.

Elements and Performance Criteria

Elements describe the essential outcomes of a unit of competency. 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.

1. Plan sales activities.
 - 1.1 Plan sales activities for existing and potential customers according to marketing plan or other organisation systems.
 - 1.2 Identify, analyse and incorporate organisation, customer and market ***information*** into sales planning process.
 - 1.3 Source prospects and create profiles.
 - 1.4 Proactively seek and evaluate innovative sales opportunities and take advantage of new technologies and media.
 - 1.5 Estimate potential revenue, based on analysis of information and in consultation with appropriate colleagues.
 - 1.6 Plan activities and ***practical sales call patterns*** that maximise opportunities to meet individual and team targets.
 - 1.7 Consider ***legal, ethical and sustainability issues***.
2. Prepare for sales calls.
 - 2.1 Make sales call appointments in advance where appropriate.
 - 2.2 Develop ***sales call strategies and tactics*** based on market knowledge, current sales focus and consultation with colleagues.
 - 2.3 Gather ***information and support materials*** to support sales calls.
3. Make sales calls.
 - 3.1 Make sales calls according to agreed call patterns.
 - 3.2 Build relationships with customers through use of effective interpersonal communication styles.
 - 3.3 Develop customer trust and confidence through 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 marketing focus.
 - 3.7 Encourage feedback from customers and proactively seek market intelligence.
4. Review and report on sales activities.
 - 4.1 Review activities according to agreed evaluation methods and incorporate results into future sales planning.
 - 4.2 Prepare sales reports according to organisational policy and required timeframes.
 - 4.3 Present current and clear market intelligence to those responsible for sales and marketing planning.

Required Skills and Knowledge

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

Required skills

- communication skills to:
 - use effective selling techniques
 - establish and conduct positive business relationships
- critical thinking skills to evaluate market and customer information for sales opportunities
- initiative and enterprise skills to proactively identify and respond to new opportunities
- literacy skills to:
 - interpret customer and market trend information
 - develop sales reports
- numeracy skills to:
 - calculate potential sales revenues
 - create and interpret sales statistics
- planning and organising skills to plan for and manage sales call patterns
- problem-solving skills to proactively identify and respond to operational and more systemic customer problems
- self-management skills to take responsibility for sales outcomes
- technology skills to use current sales management systems.

Required knowledge

- principles of selling, sales communication and relationship building
- industry structures and interrelationships, industry networks and information sources
- industry and market knowledge appropriate to the sector and organisation, including:
 - distribution and marketing networks, especially those that support the product or service being promoted
 - commission structures
 - current customer and market trends
 - links between sales and other areas of organisational operations
- structure and content of marketing plans and the role of sales in the overall marketing mix
- legal issues that impact on sales personnel, including consumer protection provisions
- ethical considerations for sales personnel, including:
 - truth and honesty in sales
 - targeting of particular groups in the community
- sustainability considerations for sales activities, including:
 - reducing waste of printed materials
 - sustainability as a sales tool.

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.

Overview of assessment

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

Evidence of the ability to:

- plan and implement a range of sales activities for an operation, product or service including the preparation of sales reports
- use effective communication skills during sales calls
- demonstrate knowledge of the industry, including structure and interrelationships, industry networks, information sources and distribution and marketing networks.

Context of and specific resources for assessment

Assessment must ensure use of:

- real or simulated products or services for which the individual can conduct sales activities
- current information and communications technology used by industry to manage sales activities
- marketing plans and operational sales documents, such as sales reports and sales support materials
- other people with whom the individual can interact.

Method of assessment

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

- evaluation of sales activities undertaken by the individual including sales planning and associated implementation
- sales reporting, incorporating analysis of performance
- use of case studies to assess knowledge of how sales activities can be used in specific industry contexts
- written or oral questioning to assess 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 individual.

Guidance information for assessment

In the workplace, people always combine the skills described in different units to do their jobs. For effective assessment of this unit, the assessor should use integrated activities that also provide evidence of skills in other units, for example:

- SITXMGT501 Establish and conduct business relationships

- SITXMPR404 Coordinate marketing activities.

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.

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

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

Practical sales call patterns may be affected by:

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

Legal, ethical and sustainability issues may relate to:

- consumer law and trade practices
- work health and safety obligations
- resource conservation
- targeting of particular groups
- ways of presenting information.

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

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

Information and support materials may include:

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

Unit Sector(s)

Cross-Sector

Competency Field

Marketing and Public Relations