



Australian Government

BSBSLS407 Identify and plan sales prospects

Release: 1

BSBSLS407 Identify and plan sales prospects

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to identify potential sales prospects by applying prospecting methods, and manage own sales performance by establishing a sales plan, while managing stress, time and sales-related paperwork.

It applies to individuals working in a sales-related position in a small, medium or large enterprise in a wide variety of industries, who identify, collate and follow up sales prospect information to generate leads. Individuals undertaking this unit may be at entry level, or have experience in sales sufficient to provide advice and support about aspects of sales solutions as part of a sales team.

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

Unit Sector

Business Development – Sales

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Employ prospecting methods and qualify prospects	1.1 Identify, consider and evaluate strengths and limitations of range of primary and secondary prospecting methods 1.2 Select prospecting methods to match market to which the product or service is targeted 1.3 Target present, previous and new clients through chosen prospecting methods 1.4 Research and establish criteria for qualifying leads according to buyer accessibility, buyer motives, product affordability,

ELEMENT	PERFORMANCE CRITERIA
	purchase authority, legal compliance and return for seller 1.5 Ensure established criteria represent a standard against which buying potential of individuals and groups is gauged
2. Manage prospect information	2.1 Develop and implement system for recording prospect information 2.2 Monitor and evaluate effectiveness of system for recording prospect information 2.3 Refine system for recording prospect information based on evaluation
3. Establish individualised sales plan	3.1 Establish individual sales goals and quotas to focus work activities, based on organisational sales and marketing objectives 3.2 Establish consultation and communication structures with clients and supervisors 3.3 Plan and document individualised sales plan to achieve sales goals and quotas within a work system constructed against clear timeframes 3.4 Monitor and adjust sales plan to established goals and quotas 3.5 Evaluate sales plan and adjust where necessary
4. Complete sales paperwork and reports	4.1 Establish system to collect, record and organise data associated with sales process 4.2 Complete routine reports at regular intervals according to organisational requirements 4.3 Use available technology to facilitate record-keeping and production of sales reports
5. Organise workload effectively	5.1 Establish routines to provide structure for work and to manage workload 5.2 Allocate time for specific work tasks and unanticipated events and activities 5.3 Conduct analysis of time spent on work-related activities and adjust time spent on tasks, if required 5.4 Apply time-management strategies to minimise non-productive sales activities 5.5 Delegate tasks to individuals or sales team members to share workload as appropriate 5.6 Identify and monitor symptoms of stress and seek expert assistance

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description
Reading	1.1-1.5, 2.1-2.3, 3.1-3.5, 4.1-4.3, 5.1-5.4	Analyses and evaluates textual information to develop research strategies, integrate facts and ideas and meet organisational requirements
Writing	1.1-1.5, 2.1-2.3, 3.1-3.5, 4.1-4.3, 5.1-5.4	Creates documents using specific and detailed language to convey explicit information, requirements and recommendations
Oral Communication	1.3, 5.2, 5.5	- Presents information using clear language suited to the audience - Uses listening and questioning skills to check and confirm understanding
Numeracy	1.4-1.5, 3.1, 3.3-3.5, 5.2-5.4	Applies ratios and percentages and relevant formulae to data to calculate and interpret time durations and establish financial goals
Navigate the world of work	1.4, 3.1, 3.4, 4.2	Follows explicit and implicit organisational objectives, protocols and legal requirements
Interact with others	1.3, 3.2, 5.5, 5.6	- Tailors communication to achieve purpose, demonstrating a sophisticated understanding of audience needs - Collaborates with others to achieve organisational objectives
Get the work done	1.1, 1.3, 1.4, 2.1, 2.2, 3.3-3.5, 4.1-4.3, 5.1, 5.3-5.6	- Sequences and schedules complex activities of self and others and monitors implementation - Uses systematic, analytical processes in complex, non-routine situations, setting goals, gathering relevant information and evaluating options against agreed criteria - Monitor implementation of solutions and reflects on outcomes to identify appropriate action - Develops new and innovative ideas through exploration, analysis and critical thinking - Uses main features and functions of digital tools to complete work tasks and access information

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
BSBSLS407 Identify and plan sales prospects	BSBSLS407A Identify and plan sales prospects	Updated to meet Standards for Training Packages	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>

Assessment Requirements for BSBSLS407 Identify and plan sales prospects

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- evaluate and select the use and management of different sales prospecting methods
- develop, monitor and refine a system for recording prospecting methods
- plan, document and monitor individualised sales plan
- establish data collection system
- use appropriate technology
- organise, analyse and delegate workloads to maximise productivity
- identify and monitor symptoms of stress.

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:

- describe information management strategies used to manage prospect and sales data
- identify key principles associated with self-management
- outline key provisions of relevant legislation, codes of practice and national standards related to the sales environment
- describe prospecting methods used in sales process
- identify principles of buyer motives
- describe strategies and techniques used to prevent and manage stress.

Assessment Conditions

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

- relevant legislation, regulations, standards and codes
- relevant workplace documentation and resources
- case studies and, where possible, real situations
- interaction with others.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=11ef6853-ceed-4ba7-9d87-4da407e23c10>