



Australian Government

Department of Education, Employment and Workplace Relations

BSBSLS407A Identify and plan sales prospects

Revision Number: 2

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Modification History

Release	Comments
Release 2	New release of this Qualification released with <i>version 6 of BSB07 Business Services Training Package</i> . Outdated advice removed

Unit Descriptor

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

Application of the Unit

This unit 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 that can be used 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.

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

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.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Employ prospecting methods and qualify prospects	1.1. Identify, consider and evaluate the strengths and limitations of a range of primary and secondary prospecting methods 1.2. Select prospecting methods to match the 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, purchase authority, legal compliance and return for the seller 1.5. Ensure the established criteria represent a standard against which the buying potential of individuals and groups is gauged
2. Manage prospect information	2.1. Develop and implement a system for recording prospect information 2.2. Monitor and evaluate the effectiveness of the system for recording prospect information 2.3. Refine the system for recording prospect information based on evaluation
3. Establish an 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 an individualised sales plan to achieve sales goals and quotas within a work system that is constructed against clear timeframes 3.4. Monitor and adjust sales plan in relation to established goals and quotas 3.5. Evaluate sales plan and adjust where necessary
4. Complete sales paperwork and reports	4.1. Establish a system to collect, record and organise data associated with the 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

ELEMENT	PERFORMANCE CRITERIA
	unanticipated events and activities 5.3. Conduct an analysis of the 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. Monitor <i>symptoms of stress</i> and establish a plan to reduce stress

Required Skills and Knowledge

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

Required skills

- learning skills to evaluate effectiveness of sales plan and make improvements to contribute to the organisation's operations and outcomes
- literacy and information management skills to collect, record and organise data to:
 - establish a sales plan
 - complete sales reports
- planning skills to establish, monitor and adjust sales plan as required
- research and data analysis skills to determine prospect requirements
- self-evaluation skills to identify symptoms of negative stress
- technological skills to use a range of software and business equipment to:
 - collect and record prospect and sales information
 - design and record formats to facilitate information storage and retrieval
- self-management skills to manage own performance and set priorities
- time-management skills to:
 - meet sales time lines
 - sequence tasks
 - set priorities

Required knowledge

- information management strategies used to manage prospect and sales data
- key principles associated with self-management
- overview knowledge to identify key provisions of relevant legislation, codes of practice and national standards that affect business operations as they relate to sales, such as:
 - anti-discrimination
 - ethical principles
 - consumer protection
 - contract law
 - privacy laws
 - Trade Practices Act
- prospecting methods used in the sales process
- principles of buyer motives
- strategies and techniques to prevent and manage stress

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 following is essential: • demonstration of the use and management of different prospecting methods targeting a present, previous and new client • research and establishment of criteria used in qualifying leads identified through prospecting methods • recording, storage and retrieval of prospect information • development and documentation of a sales plan for a specified time period, including: • sales goals • quotas • monitoring and evaluation strategies • organisation of own workload.
Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • organisational sales prospect information, databases and records • office equipment and resources.
Method of assessment	The following assessment methods are appropriate for this unit: • assessment of criteria developed to qualify sales leads • observation of demonstration of prospecting methods • assessment of individual sales plan documentation • direct questioning combined with portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of principles of buyer motives, content of sales plan developed and techniques used to organise workload and manage stress levels • review of time-management strategies applied to minimise non-productive sales activities • review of system established to collect, record and organise data associated with the sales process.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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.

Prospecting methods may include:	• brokers • cold canvassing • databases • direct mail • internet • intra-organisational leads • journals • magazines • media advertising • networking • newspapers • personal observation • public records • referrals • spotters • telemarketing.
Clients may include:	• consumers • customers • members • patients • members of other business units within an organisation • other work teams within an organisation • person or organisation who receives or has the potential to receive products, services or ideas supplied by the organisation.
Buyer motives may include:	• browsing • buying for unqualified prospect e.g. dependant child • gift • housekeeping • replacement item • self-reward • self-gratification.
Available technology may include:	• databases • email • spreadsheets

	• word processing software packages • other computer applications.
Work tasks may include:	• administrative tasks • face-to-face selling • sales preparation • service calls • travelling.
Symptoms of stress may include:	• anxiety • changed eating habits • difficulty concentrating • fear of criticism or disapproval • feeling overworked or overloaded • feeling tense or on edge • feeling tired • feeling unclear about roles and responsibilities • feeling weak or easily exhausted • increased consumption of alcohol • nervousness • restlessness • trembling or shaking • worry.

Unit Sector(s)

Business development - sales