



Australian Government

Department of Education, Employment and Workplace Relations

SIFSLS003A Lead a sales team

Revision Number: 1

SIFSL003A Lead a sales team

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, implement, direct and evaluate sales team activities.
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Application of the Unit

Application of the unit	This unit applies to funeral home and cemetery and crematorium staff and involves leading and managing staff with a high level of autonomy and responsibility.
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	Nil
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Employability Skills Information

Employability skills	This unit contains employability skills.
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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 operations. | 1.1 Identify and develop <i>sales team objectives</i> . |
| | | 1.2 Prepare a sales plan and budget to support attainment of objectives. |
| | | 1.3 Determine size and structure of sales team. |
| | | 1.4 Select sales team members according to sales team objectives and <i>workplace policies and procedures</i> . |
| | | 1.5 Provide sales team members with <i>initial training</i> . |
| 2 | Direct the sales team. | 2.1 Monitor sales team to ensure that <i>products and services</i> match client needs according to workplace policies and procedures, and <i>relevant legislation</i> . |
| | | 2.2 Implement and monitor <i>financial transactions</i> , sales agreements and financing arrangements according to workplace policies and procedures, and relevant legislation. |
| | | 2.3 Monitor sales team to ensure <i>sales documentation</i> is completed according to workplace policies and procedures, and relevant legislation. |
| | | 2.4 Implement <i>strategies</i> to support sales team members. |
| | | 2.5 Identify and allocate resources to support attainment of sales according to workplace policies and procedures. |

ELEMENT	PERFORMANCE CRITERIA						
3 Evaluate effectiveness and performance of sales team.	<table><tr><td data-bbox="568 286 624 322">3.1</td><td data-bbox="644 286 1402 360">Establish systems to evaluate sales effectiveness against sales team objectives.</td></tr><tr><td data-bbox="568 376 624 412">3.2</td><td data-bbox="644 376 1402 450">Take corrective action where sub-standard performance is identified.</td></tr><tr><td data-bbox="568 465 624 501">3.3</td><td data-bbox="644 465 1402 501">Adjust sales team planning to reflect evaluation outcome.</td></tr></table>	3.1	Establish systems to evaluate sales effectiveness against sales team objectives.	3.2	Take corrective action where sub-standard performance is identified.	3.3	Adjust sales team planning to reflect evaluation outcome.
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3.2	Take corrective action where sub-standard performance is identified.						
3.3	Adjust sales team planning to reflect evaluation outcome.						

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills

- communication skills, including clear and direct communication and active questioning, listening and negotiation, to liaise with sales team members and provide staff training
- literacy and numeracy skills to prepare sales plans and budgets and monitor completion of sales documentation
- problem-solving skills to allocate resources, establish evaluation systems and take corrective action to address sub-standard team performance
- planning and organisational skills to identify clear objectives and monitor sales team performance
- teamwork skills to support sales team members.

Required knowledge

- products and services, including features and price
- sales techniques
- customer service techniques
- procedures for using office equipment and technology
- recruitment, selection, induction and training strategies
- human resource policy and practices
- in-depth knowledge of relevant federal, state or territory, and local government legislation and regulations relating to consumer protection, privacy and the sale of funeral services
- workplace policies and procedures in relation to sales services.

Evidence Guide

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.

Critical aspects for assessment and evidence required to

Evidence of the following is essential:

- establishment of the sales objectives, plans and budgets

EVIDENCE GUIDE

demonstrate competency in this unit

relevant to the nature of the sales operation and consistent with marketing and sales strategies

- selection, recruitment and training of a sales team according to sales objectives, budget and plan
- project or work activities conducted over a period of time to ensure consistency of performance, to allow the candidate to play an ongoing sales team-leading role and respond to and evaluate different situations.

Context of and specific resources for assessment

Assessment must ensure:

- demonstration of skills in an environment where staff training and performance monitoring can take place
- access to relevant documentation, such as sales plans and budgets
- interaction with team members.

Methods of assessment

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

- observation of candidate identifying sales objectives and preparing plans and budgets relevant to sales operation; selecting, recruiting and training a sales team; and evaluating team performance
- written or verbal questioning to assess knowledge and understanding of relevant policies and procedures with regard to leading a sales team
- review of workplace documents completed by candidate
- 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:

- SIFMPR004A Develop marketing strategies and activities.

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, 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.

Sales team objectives may include:

- marketing and sales strategies
- nature of sales operation.

Workplace policies and procedures may include:

- standard operating policies and procedures, such as:
 - human resource policies and practices
 - equity and diversity
 - recruitment, selection, induction and training
 - sales and customer service
- standards and certification requirements
- quality assurance procedures
- code of behaviour.

Initial training may include:

- videotapes
- lectures
- one-on-one instruction
- role plays
- audio-tapes
- simulations
- slides
- films
- case studies
- videoconferencing
- teleconferencing
- computer software packages.

RANGE STATEMENT

Products and services may include:

- funeral arrangements
- embalming arrangements
- cremation arrangements
- burial arrangements
- coffins or caskets
- coffin or casket accessories
- burial plots
- mausoleum crypts
- headstones
- grave markers
- urns
- nameplates.

Relevant legislation and regulations may include:

- Fair Trading Act
- Funerals (Pre-paid Money) Act
- Consumer Credit Code
- Privacy Acts
- local government regulations
- equal employment opportunity.

Financial transactions may include:

- cash
- cheque
- credit card.

Sales documentation may include:

- sales documents and agreements
- financing arrangements.

Strategies may include:

- coaching
- providing feedback
- recognising and rewarding sales team member performance.

RANGE STATEMENT

Corrective action may include:

- additional training
- mentoring
- ongoing feedback
- goal-related feedback
- individualised development plans.

Unit Sector(s)

Sector Funeral Services

Competency field

Competency field Sales