



Australian Government

SITXMPR003 Plan and implement sales activities

Release: 1

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Modification History

Not applicable.

Application

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.

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

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

Pre-requisite Unit

Nil

Competency Field

Marketing and Public Relations

Unit Sector

Cross-Sector

Elements and Performance Criteria

ELEMENTS	PERFORMANCE CRITERIA
Elements describe the essential outcomes.	Performance criteria describe the performance needed to demonstrate achievement of the element.
1. Plan sales activities.	1.1. Plan sales activities for existing and potential customers according to marketing plan or other organisational 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 and are consistent with legal, ethical and sustainability requirements.
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 or 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.

Foundation Skills

Foundation skills essential to performance in this unit, but not explicit in the performance criteria are listed here, along with a brief context statement.

SKILLS	DESCRIPTION
Oral communication skills to:	establish and conduct positive business relationships.
Numeracy skills to:	- calculate potential sales revenues - create and interpret sales statistics.
Problem-solving skills to:	proactively identify and respond to operational or more systemic customer problems.

Initiative and enterprise skills to:

- proactively identify and respond to new opportunities.

Technology skills to:

- use current sales management systems.

Unit Mapping Information

SITXMPR403 Plan and implement sales activities

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=68c40a93-e51d-4e0f-bc06-899dff092694>

Assessment Requirements for SITXMPR003 Plan and implement sales activities

Modification History

Not applicable.

Performance Evidence

Evidence of the ability to complete tasks outlined in elements and performance criteria of this unit in the context of the job role, and:

- plan and implement sales activities according to organisational requirements for at least two different operations, products or services, including conducting at least one sales call as part of the activities for each operation, product or service
- use effective communication skills during sales calls that are part of above sales activities
- prepare a report on each of the above sales activities.

Knowledge Evidence

Demonstrated knowledge required to complete the tasks outlined in elements and performance criteria of this unit:

- 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:
 - 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
- information inputs into sales planning process:
 - competitive activity
 - current sales figures for nominated periods
 - financial statistics
 - market trends
 - sales and marketing reports
- sales call strategies and tactics:
 - focus on specific products or offers
 - response to competitive activity
 - use of individual customer history
- legal issues that impact on sales activities and sales personnel:
 - Australian consumer law

- work health and safety obligations
- ethical considerations for sales personnel:
 - honesty in sales
 - targeting particular groups in the community
- sustainability considerations for sales activities:
 - reducing waste of printed materials
 - sustainability as a sales tool.

Assessment Conditions

Skills must be demonstrated in an operational business operation or activity for which the individual can conduct sales activities for products or services. This can be:

- an industry workplace
- a simulated industry environment.

Assessment must ensure access to:

- current information and communications technology used by industry to manage sales activities
- marketing plans, operational sales documents, sales reports and sales support materials
- other people with whom the individual can interact; these can be:
 - those in an industry workplace who are assisted by the individual during the assessment process; or
 - individuals who participate in role plays or simulated activities, set up for the purpose of assessment, in a simulated industry environment operated within a training organisation.

Assessors must satisfy the Standards for Registered Training Organisations' requirements for assessors.

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