

Competency Standard

UNIT TITLE: PLAN AND IMPLEMENT SALES ACTIVITIES		NOMINAL HOURS: 40
UNIT NUMBER: D1.HSM.CL5.02 D2TTO.CL4.17 D2.TCS.CL5.18		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to plan and implement the sales activities of a sales team from a managerial perspective in a tourism and hospitality context		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Identify the context for sales activities</p> <p>1.1 Describe the <i>sales objectives</i> of relevant internal documents</p> <p>1.2 Identify relevant <i>organisational policies and procedures</i></p> <p>1.3 Determine the <i>key performance indicators</i> to evaluate sales performance</p> <p>Element 2: Plan sales activities</p> <p>2.1 Plan and schedule sales activities for existing and potential customers in accordance with <i>relevant internal documents</i> and/or system</p> <p>2.2 Identify, analyse and incorporate appropriate host enterprise, customer and market <i>information to be included into the sales planning process</i></p>	<p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.</p> <p>This unit applies to all industry sectors that utilise a planned, proactive and marketing-based approach to selling activities within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> 1. Front Office 2. Housekeeping 3. Travel Agencies 4. Tour Operation <p><i>Sales objectives</i> may be related to:</p> <ul style="list-style-type: none"> • Market share • Turnover • Profit • Units sold 	

<p>2.3 <i>Source prospects and create prospect profiles</i></p> <p>2.4 <i>Estimate potential revenue based on analysis of information captured in consultation with appropriate colleagues</i></p> <p>2.5 <i>Plan activities to maximise opportunities to meet required sales performance targets</i></p> <p>2.6 <i>Establish practical sales call patterns based on analysis of all relevant customer and market information</i></p>	<ul style="list-style-type: none"> • Percentage growth • Ratio of enquiries converted to sales • Number of sales-related enquiries received • Specific products and/or services • Nominated periods of the year including seasonal, events, holidays, peak seasons and low seasons.
<p>Element 3: Prepare for sales calls</p> <p>3.1 <i>Make sales call appointments in advance where appropriate</i></p> <p>3.2 <i>Develop sales call strategies and tactics</i></p> <p>3.3 <i>Gather specific information and support materials to support individual sales calls</i></p>	<p><i>Organisational policies and procedures</i> may include:</p> <ul style="list-style-type: none"> • Approved selling approaches and techniques • Recommended techniques for approaching and closing a sale • Allowable types and styles of advertising campaigns • Specified target markets including niche markets • Media to be used for advertising • Promotional approaches that are allowed • Public relations initiatives approved and/or authorised • Scopes of authority for making sales-related decisions
<p>Element 4: Make sales calls</p> <p>4.1 <i>Call on prospects in accordance with call schedules</i></p> <p>4.2 <i>Build relationship and rapport with prospect</i></p> <p>4.3 <i>Develop prospect trust and confidence</i></p> <p>4.4 <i>Identify and resolve customer purchasing issues</i></p> <p>4.5 <i>Use selling techniques to optimise sales opportunities and meet/exceed sales targets</i></p>	<ul style="list-style-type: none"> • Price-related issues relating to allowable discounts, concessions, free-of-charge products and services, loyalty schemes, and all other factors that have the capacity to impact on selling price and profit. <p><i>Key performance indicators</i> will include:</p> <ul style="list-style-type: none"> • Sales objectives • The impact that increased sales may have had on service levels and customer satisfaction levels • Consideration of the intangible elements that are central to the operation and reputation of the business • Relevant timelines and milestones

<p>4.6 <i>Provide information on product features and benefits</i> in accordance with host enterprise policies and procedures</p> <p>4.7 <i>Encourage feedback</i> from prospects and customers</p> <p>4.8 <i>Seek market information</i> from prospects and customers</p> <p>Element 5: Evaluate sales activities</p> <p>5.1 <i>Review sales activities</i> in accordance with established methods</p> <p>5.2 Incorporate results of reviews of sales activities into future sales planning</p> <p>5.3 <i>Prepare sales report</i></p> <p>5.4 <i>Provide identified market intelligence</i> to assist in sales planning activities</p> <p>5.5 <i>Share sales-related information</i> with sales team members</p>	<ul style="list-style-type: none"> • Return in investment of monies spent on sales activities • Relevant success rates for direct selling activities, media campaigns, public relations exercises, and other nominated promotional sales activities • The contribution made by joint venture arrangements and agency affiliations, including consideration of the costs associated with such agreements. <p><i>Relevant internal documents</i> should include:</p> <ul style="list-style-type: none"> • Business plans • Strategic plans • Marketing plans • Departmental operational plans • Budget reports and financial statements, including consideration of revenue, cash flow, costs, profits • Reviews of previous marketing and sales-related activities • Customer feedback. <p><i>Information to be included into the sales planning process</i> should relate to:</p> <ul style="list-style-type: none"> • Sales and marketing reports • Financial statistics • Market trends • Competitive activity • Consideration of new and/or revised products and services • State of the economy. <p><i>Source prospects and create prospect profiles</i> may include:</p> <ul style="list-style-type: none"> • Proactively seeking out prospective customers • Reviewing the buying history of previous customers
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- Asking existing customers for referrals
- Using internet websites to capture prospects information
- Conducting an in-house or external activity/competition to capture information about prospective customers
- Generating files for potential customers, including indication of identified demographic characteristics deemed necessary by the organisation to support successful sales activities.

Estimate potential revenue may include:

- Using various modelling techniques
- Addressing a variety of price points for sales
- Calculating the possible increase in sales as a result of:
 - Selling price reductions
 - Packages and specials
 - Time-limited offers
 - Offers made only to a selected band of customers
 - Increasing prices
 - Value-adding to existing products and services
 - Viable changes to the '4Ps of marketing' (Price, Place, Product, Promotion)
- Undertaking focused market research on spending patterns of target markets and the changes in these patterns in response to nominated sales activities.

Appropriate colleagues may include:

- Supervisors, managers and owners
- Accounts department
- Sales and marketing department

- Frontline sales staff
- Any customer contact staff
- External marketing consultants
- Representatives from head office and other organisations with which the business has an appropriate commercial arrangement.

Activities to maximise opportunities to meet required sales performance targets may include:

- Advertising
- Promotions
- Entering into new markets
- Adding new products and services to the sales menu
- Public relations
- Direct selling
- Joint promotions
- Consideration of individual activities and team/departmental activities.

Establish practical sales call patterns may include:

- Identifying hot and cold prospects
- Sharing the calls equitably amongst sales staff
- Allocating the most relevant sales personnel to nominated prospects
- Scheduling calls
- Placing appropriate staff on roster
- Determining or clarifying sales and revenue targets
- Determining level of call intensity required
- Considering relevant geographic constraints and factors
- Aligning with current host enterprise priorities

- Accommodating the needs for administration activities and reporting functions.

Make sales call appointments in advance may include:

- Contacting prospects, including by e-mail, telephone or in person
- Determining the best time to make the sales call
- Advising prospect about the content and duration of the sales call
- Offering to send pre-sales call information for the prospect to read/consider
- Confirming contact details.

Develop sales call strategies and tactics may include:

- Basing approaches on market knowledge, current sales focus and consultation with appropriate colleagues
- Factoring in availability of products and services to be sold
- Focusing on specific products and/or offers
- Reviewing customer sales history
- Assessing current sales figures for nominated periods
- Meeting activities undertaken by competitors.

Information and support materials to support individual sales calls may include:

- Company profile
- Brochures
- Tariff sheets
- Other handouts and flyers
- Third party materials
- Internet information and hard copy downloads
- Electronic updates to existing materials and information
- Display materials

- Samples
- Give-a-ways
- Incentive materials.

Call on prospects may include:

- Reviewing previous call history
- Ensuring promised information has been researched and is available
- Ensuring promised materials are ready for distribution
- Checking personal appearance and grooming
- Listing personal whereabouts on host enterprise board
- Calling ahead to remind prospect
- Ensuring punctuality
- Determining in advance the sales approach to be used.

Build relationship and rapport may include:

- Using effective interpersonal skills
- Using the customer's name
- Demonstrating respect for the prospect
- Re-scheduling the call if required by the customer
- Understanding the needs, wants and preferences of the customer
- Explaining and illustrating the capacity and capability of the host enterprise
- Using appropriate verbal and non-verbal communication skills and techniques
- Demonstrating a willingness to be of service
- Thanking the customer for their time.

Develop prospect trust and confidence may include:

- Demonstrating personal and professional integrity

- Telling the truth, including informing the customer about the negative aspects of a product and/or service being sold
 - Mentioning limitations of products and services
 - Refraining from exaggerating a product or service
 - Being prepared to lose a sale rather than telling an untruth
 - Refraining from criticising the opposition.
- Identify and resolve customer purchasing issues may include:*
- Presenting a business proposal to the customer, where appropriate
 - Explaining the benefits of the products and/or services being promoted
 - Highlighting the advantages of purchasing products and services from the company
 - Describing how the proposed products and services meets identified customer needs, wants and preferences
 - Adhering to pre-prepared sales spiel
 - Overcoming buying objections including:
 - Identifying and accepting customer objections
 - Categorising objections into price, time, product/service characteristics
 - Offering solutions according to enterprise policies
 - Applying problem solving to overcome customer objections
 - Using the 'feel-felt-found' approach.
- Use selling techniques may include:*
- Offering bonuses and incentives, including the use of give-a-ways
 - Creating packages to add value to the business
 - Change terms and conditions, where practical, to better suit customer needs/preferences
 - Recognising opportunities for making additional sales

- Advising customer of complementary products or services according to customer's identified need (s)
 - Demonstrating the ability to make add on sales, to up-sell, to use suggestive selling techniques and to use other approaches to maximising sales
 - Demonstrating the ability to be an order maker and not just an order taker
 - Complying with enterprise policies in relation to selling
 - Closing the sale using accepted strategies which may include:
 - Monitoring, identifying and responding appropriately to customer buying signals
 - Encouraging customers to make purchase decisions through the use of appropriate and acceptable verbal and non-verbal prompts
 - Congratulating the customer on their selection
 - Thanking the customer for their business
 - Encouraging the customer the return to make further purchases.
- Provide information on product features and benefits may include:*
- Providing promotional material, including brochures, third party materials, videos/digital video disc (DVDs)
 - Supplying verbal explanation
 - Using the organisation's website in conjunction with the customer
 - Relaying anecdotes to the customer
 - Ensuring all information provided is accurate, relevant and current.
- Encourage feedback may include:*
- Asking customer for feedback
 - Leaving customer with a customer comment card to complete and remit to the organisation
 - Encouraging the use of online feedback forms
 - Noting comments made by the customer
 - Asking customer what it would take for them to make a purchase/booking.

	<p><i>Seek market information</i> may include:</p> <ul style="list-style-type: none"> • Asking customer questions about their last/previous tours, trips, travel experiences • Applying a pre-prepared market research form • Asking for names and contact details of other people they believe may be interested in the products and services being offered. <p><i>Review sales activities</i> may include:</p> <ul style="list-style-type: none"> • Evaluating the results of the sales activities with reference to the nominated key performance indicators and sales objectives established by the organisation • Evaluating the activities undertaken to assess suitability, cost, effectiveness and acceptability to the target market populations • Identifying innovative activities and suggestions that may have arisen during the previous period. <p><i>Prepare sales report</i> may include:</p> <ul style="list-style-type: none"> • Preparing reports in accordance with required timelines and enterprise procedures, including presentation requirements • Identifying outcomes in terms of key performance indicators and sales objectives • Identifying sales, bookings and enquiries by individual members of the sales team • Recognising and acknowledging effort by the sales team • Identifying specific factors that impeded sales efforts, including weather, political activity, economic conditions, staff illness, competitor activity • Indicating emerging trends • Indicating products and services that are being regularly mentioned by customers and prospects. <p><i>Provide identified market intelligence</i> may include:</p> <ul style="list-style-type: none"> • Providing new market research data • Providing recent feedback from clients
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- Providing information gathered as a result of personal observation and experience
- Providing data relating to all sales that have been made, including types and volumes of products and services, commissions, timing
- Passing on names and details of prospects to relevant other staff, including referring corporate contacts to the corporate client manager and appropriate others
- Supplying information about new sales techniques and strategies to the sales team
- Advising sales team of changes to relevant organisational policies and procedures.

Share sales-related information may include:

- Holding team meetings
- Providing hard copy information
- Sharing information via the intranet
- Disseminating information at staff briefings.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- The enterprise's policies and procedures in regard to promoting and selling products and/or services
- Principles of promotion and selling
- Research skills
- Communication, negotiation, interpersonal and rapport building skills
- Product and service knowledge
- Knowledge of target markets for the host enterprise
- Compliance with legal issues of the host country in relation to the promotion and sale of products and services
- Knowledge of differing customer preferences, needs and wants
- Ability to meet and overcome buying objections

- Ability to make suggestions and recommendations in line with identified customer wants, needs and preferences
- Ability to apply a variety of acceptable sales techniques that will achieve a win-win situation without putting pressure on the customer.

Linkages To Other Units

- Promote products and services to customers
- Access and retrieve computer-based data
- Develop and update local knowledge
- Maintain hospitality industry knowledge
- Receive and resolve customer complaints
- Provide advice to patrons on food and beverage services
- Gather and present product information
- Maintain a paper-based filing and retrieval system
- Plan and implement sales activities or campaigns
- Prepare and deliver a presentation
- Maintain product information inventory
- Source and present information
- Work effectively with colleagues and customers.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures in regard to promoting and selling products and/or services
- Demonstrated ability to plan viable and effective sales activities to achieve nominated sales targets within a specified industry context

- Demonstrated ability to prepare for, and deliver, a sales call on an identified customer in an attempt to sell a nominated industry product
- Demonstrated ability to prepare for, and deliver, a sales call on an identified customer in an attempt to sell a nominated industry service.

Context of Assessment

This unit may be assessed on or off the job

- Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility.

Resource Implications

Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Analysis of portfolio of evidence prepared by the candidate, including sales material, market research data, customer feedback, sales reports
- Problem solving
- Role plays involving selling activities and sales presentations
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit		
<i>Level 1 = competence to undertake tasks effectively</i>		
<i>Level 2 = competence to manage tasks</i>		
<i>Level 3 = competence to use concepts for evaluating</i>		
Key Competencies	Level	Examples
Collecting, organising and analysing information	3	Evaluate sales data to determine effectiveness of sales activities
Communicating ideas and information	3	Share sales plans, techniques and strategies with sales staff
Planning and organising activities	2	Schedule sales calls
Working with others and in teams	3	Monitor sales activities and results
Using mathematical ideas and techniques	2	Calculate levels of attainment of key performance criteria
Solving problems	2	Develop legitimate techniques to overcome customer buying objections
Using technology	3	Use software packages to record sales data