



## US 61 – Sell goods and/or services on a consultancy basis Level 4, Credit 6, Version 6

This evidence guide aims to assist you in preparing for assessment of this unit standard. It outlines the requirements for each element in the unit standard and the knowledge you need to have before you are assessed.

### **Purpose of the unit standard:**

People credited with this unit standard are able to: establish, maintain, and increase a client base; sell goods and/or services to clients; close transaction and complete documentation; and develop an on-going business relationship with clients.

### **Resources**

The following resources may be useful when completing this assessment

- Client data base which has fields to allow the collection of information on clients and potential clients

### **Definitions from the Unit Standard**

*Organisational procedures* refer to instructions to staff on policy and procedures which are formally documented, or generally accepted within the workplace.

*Selling on a consultancy basis* refers to selling where the salesperson is an expert employed in the service sector who provides goods and/or services (tangible or intangible) for clients.

*Organisation* refers to any workplace, work site and/or training or educational establishment.

*Client* may be internal or external and refers to the recipient of goods and/or services.

*Active listening* refers to the skills of listening. These skills may include but are not limited to – questioning, reading and responding to body language, use of silence, paraphrasing, summarising, reflecting words and feelings.

*Prospecting* refers to the activity of searching for new clients.

### **Summary of Evidence Requirements**

Sources of evidence may include:

- Observation,
- Verbal answers
- Written answers
- Computer print outs
- Letters of attestation

### **Instructions:**

If evidence is cross-referenced from other unit standards, the assessor must indicate the unit standards that are used as the basis of this cross-referencing.

Performance of the elements of this unit standard must comply with the requirements of the following:

Privacy Act 1993, Fair trading Act 1986; Consumer Guarantees Act 1993; Layby Sales Act 1971; Credit Contracts and Consumer Finance Act 2003; Health and Safety in Employment Act 1992; Human Rights Act 1993; Sale of Goods Act 1908; other published statutes, regulations, codes of practice, guidelines and standards relevant to the particular work site, and their subsequent amendments and replacements

Read through the checklist on the following pages; if you can confidently tick all the boxes then you are ready to be assessed. If not, you will need to complete additional work before you are assessed.

The column labelled *evidence* is there for you to make notes about the type of evidence you are going to supply. This is optional.

If you are unsure of any requirements you may contact your assessor or workplace mentor for further clarification. It is recommended that you have all your evidence prepared before you meet with your assessor.

# Evidence Checklist for US 61

☑	Performance criteria	Evidence
	<b>Element 1. Establish, maintain, and increase a client base</b>	
	<p>1.1 You must establish a client data base, containing at least three (3) clients, which complies with your organisations policies and procedures.</p> <p>1.2 You must prospect for at least two (2) future clients using at least two (2) different prospecting methods. Prospecting methods and potential clients must comply with your organisations policies and procedures</p> <p>Prospecting methods may include:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Cold canvassing</li> <li><input type="checkbox"/> Direct mailing</li> <li><input type="checkbox"/> Use of databases</li> <li><input type="checkbox"/> Networking</li> </ul> <p>Potential clients may include:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Contacts made through networking</li> <li><input type="checkbox"/> Previous customers</li> <li><input type="checkbox"/> Referrals</li> <li><input type="checkbox"/> Members of clubs and associations</li> <li><input type="checkbox"/> Social contacts</li> </ul>	

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## 1.3

You will ensure that at least two (2) client profiles contained on the data base are updated and maintained according to your organisation's policies and procedures.

Profiles updated and maintained may include:

- Market segment into which the client fits
- Contact details of the client
- Previous purchases made by client
- Client demographics
  - e.g.
    - Age
    - Gender

## 1.4

You will take part in at least two (2) promotional activities, in order to maintain and increase the client database.

Promotional activities may include:

- Meetings
- Meals
- Sponsorship
- Public relations
- Demonstrations
- Displays

Promotional activities must comply with your organisation's policies and procedures.

## 1.5

You must identify and pursue at least two (2) opportunities for sales in accordance with your organisation's policies and procedures.

# Evidence Checklist for US 61

<input checked="" type="checkbox"/>	<b>Element 2: Sell goods and/or services to clients</b> <b>Range: evidence is required for three (3) different sales transactions</b>	
	<p>2.1 You must identify the product and/or service needs of clients during at least three (3) different sales transactions, in accordance with organisational policies and procedures.</p> <p>2.2 You must identify and explain ways in which the product and/or service will meet the needs of clients during at least three (3) different sales transactions. You will explain to the clients in a way which complies with organisational policies and procedures. e.g.</p> <ul style="list-style-type: none"><li><input type="checkbox"/> The features and benefits of the product and/or service</li><li><input type="checkbox"/> Price of the product and/or service</li><li><input type="checkbox"/> Value offered by the product and/or service</li><li><input type="checkbox"/> Service and/or product information</li><li><input type="checkbox"/> Advantages of the product and/or service</li><li><input type="checkbox"/> Other (please specify)</li></ul> <p>2.3 You must make a recommendation to the client regarding which product and/or service the client should buy during at least three (3) different sales transactions. You must ensure your recommendations comply with your organisations procedures.</p>	

# Evidence Checklist for US 61

## 2.4

You must ensure you deal with objections expressed by the client, regarding the recommended product and/or service during at least three (3) different sales transactions.

You must deal with the objections in a way which complies with your organisation's procedures e.g.

- Active listening
  - Questioning
  - Reading and responding to body language
  - Use of silence
  - Paraphrasing
  - Summarising
  - Reflecting on what the client says
  
- Joint problem solving
  - Working through any objections together with the client.
- Using persuasion techniques
- Other (please specify)

## 2.5

You must ensure you close the sale, during at least three (3) different sales transactions, in a way which complies with your organisation's procedures

e.g.

- Direct close
- Trial close
- Alternative close
- Summary close
- Other (please specify)

# Evidence Checklist for US 61

	<p>2.6 You must identify clients with special needs during three (3) different sales transactions. You must then demonstrate strategies for meeting their needs which comply with your organisation's policy and procedures. e.g.</p> <ul style="list-style-type: none"><li><input type="checkbox"/> People with disabilities as defined by the Human Rights Act 1993, e.g. a deaf person may need the trainee to look directly at them so they can lip read.</li><li><input type="checkbox"/> Elderly people who may require a seat while being served.</li><li><input type="checkbox"/> Parents with young children, may provide toys for children to play with.</li><li><input type="checkbox"/> Other (please specify)</li></ul>	
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# Evidence Checklist for US 61



<input checked="" type="checkbox"/>	<p><b>Element 3: Close transaction and complete documentation.</b>  <b>Range: evidence is required for three (3) different sales transactions.</b></p>	
	<p><b>3.1</b>                  You must identify and act upon further opportunities to provide additional goods and/or services in accordance with organisational procedures during at least three (3) different sales transactions.                  e.g.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Ask the client if there is anything further they require.</li> <li><input type="checkbox"/> Suggest the client purchase a complementary good or service                      i.e. a travel agent may book a clients flights then offer to book accommodation and activities</li> <li><input type="checkbox"/> Other (please specify)</li> </ul> <p><b>3.2</b>                  You must close the sale in a manner which complies with your organisation’s procedures, during three (3) different sales transactions.                  e.g.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Making a closing and farewell statement</li> <li><input type="checkbox"/> Using the clients name</li> <li><input type="checkbox"/> Inviting the client to use the trainees and/or the organisations services/ products again.</li> <li><input type="checkbox"/> Thanking the client for their patronage.</li> <li><input type="checkbox"/> Other (please specify)</li> </ul> <p><b>3.3</b>                  You must complete documents which are required as a result of the sale and in accordance with your organisation’s procedures, during at least three (3) different sales transactions.                  e.g.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Contractual arrangements</li> <li><input type="checkbox"/> Deadlines</li> <li><input type="checkbox"/> Warranties</li> <li><input type="checkbox"/> Support services</li> <li><input type="checkbox"/> Legislative requirements</li> <li><input type="checkbox"/> Other (please specify)</li> </ul>	

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	<p>3.4 Payment by the client as well as contractual agreements for the goods/services is arranged by you, in accordance your organisation's procedures, during at least three (3) different sales transactions. e.g.</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Cash, receipt given</li><li><input type="checkbox"/> Credit card transaction</li><li><input type="checkbox"/> Eftpos transaction</li><li><input type="checkbox"/> Hire purchase arrangement</li><li><input type="checkbox"/> Layby arrangement</li><li><input type="checkbox"/> Other (please specify)</li></ul>	
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# Evidence Checklist for US 61

<input checked="" type="checkbox"/>	<b>Element 4: Develop an ongoing business relationship with clients.</b>
	<p>4.1 You must be able to show that you work and communicate with at least three (3) clients in a way which reflects the values of your organisation. e.g.</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Fit the vision of the workplace</li><li><input type="checkbox"/> Relate to the mission of the workplace</li><li><input type="checkbox"/> Meet the goals of the workplace</li><li><input type="checkbox"/> Relate to any ethical requirements that the business operates in.</li><li><input type="checkbox"/> Other (please specify)</li></ul> <p>4.2 You must ensure at least three (3) clients have a positive impression of yourself and of your organisation. e.g.</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Comments in a visitor book</li><li><input type="checkbox"/> Client satisfaction surveys</li><li><input type="checkbox"/> Letters of thanks from clients</li><li><input type="checkbox"/> Client feed back forms</li><li><input type="checkbox"/> Other (please specify)</li></ul> <p>4.3 You must ensure that follow up action is completed, as required by your organisation's procedures, for at least three (3) different sales transactions. e.g.</p> <ul style="list-style-type: none"><li><input type="checkbox"/> Providing further information on the product and/or service</li><li><input type="checkbox"/> After sales support services</li><li><input type="checkbox"/> Asking for feedback on goods and/or services quality</li><li><input type="checkbox"/> Information gathering</li><li><input type="checkbox"/> Other (please specify)</li></ul>