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Section 1: Meeting VET sector requirements

Training organisations have a range of requirements that they must meet in developing and implementing quality training and assessment strategies and practices for course programs. As a trainer, you also have a range of requirements that must be considered when implementing programs for your specific group of learners.

1.1 How Aspire's resources assist in meeting requirements

The following section outlines a range of VET sector requirements and how Aspire's resources may assist you and your training organisation in implementing a quality learning experience.

VET sector requirement	Aspire's approach
Australian Qualifications Framework The Australian Qualifications Framework is the national policy for regulated qualifications in the Australian education and training system. The AQF incorporates the quality assured qualifications from each education and training sector into a single comprehensive national qualifications framework. You and your training organisation must be aware of the requirements of the relevant AQF qualification or course requirements, from the endorsed training package, as you implement course delivery.	Aspire's learning resources, practice tasks and learning checkpoints have been pitched at a level suitable for the unit of competency and the qualifications for which it is relevant, based on the specifications in the Australian Qualifications Framework (AQF) (Second edition, January 2013). For more information regarding these specifications, and to download the Australian Qualifications Framework, visit the AQF website at: www.aqf.edu.au .
Volume of learning When developing training and assessment strategies for this unit and the qualification for which it is relevant, you and your training organisation must take into account the volume of learning requirements as defined by the Australian Qualifications Framework. An explanation of volume of learning can be accessed at: www.aqf.edu.au/wp-content/uploads/2013/06/Volume-of-Learning-Explanation.pdf	The sample delivery plans provided in section 3.2 include suggested time allocations. You may need to adjust these allocations when planning delivery in the context of a whole qualification to meet volume of learning requirements and learner needs.

Section 2: Unit of competency information

2.1 Unit of competency

BSBSLS407 Identify and plan sales prospects

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Application

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

It 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 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.

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

Unit Sector

Business Development – Sales

Elements and Performance Criteria

Element	Performance criteria
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>

2.2 Unit of competency assessment requirements

Assessment Requirements for BSBSLS407 Identify and plan sales prospects

Modification History

Release	Comments
Release 1	This version first released with BSB Business Services Training Package Version 1.0.

Performance Evidence	<p>Evidence of the ability to:</p> <ul style="list-style-type: none">• evaluate and select the use and management of different sales prospecting methods• develop, monitor and refine a system for recording prospecting methods• plan, document and monitor individualised sales plan• establish data collection system• use appropriate technology• organise, analyse and delegate workloads to maximise productivity• identify and monitor symptoms of stress. <p>Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.</p>
Knowledge Evidence	<p>To complete the unit requirements safely and effectively, the individual must:</p> <ul style="list-style-type: none">• describe information management strategies used to manage prospect and sales data• identify key principles associated with self-management• outline key provisions of relevant legislation, codes of practice and national standards related to the sales environment• describe prospecting methods used in sales process• identify principles of buyer motives• describe strategies and techniques used to prevent and manage stress.

3.3 Learning mapping

BSBSLS407 Identify and plan sales prospects, Release 1

Unit of competency	Content	Practice tasks	Learning checkpoint
Element 1: Employ prospecting methods and qualify prospects			
1.1 Identify, consider and evaluate strengths and limitations of range of primary and secondary prospecting methods	1A Identify, consider and evaluate strengths and limitations of a range of primary and secondary prospecting methods	1	LC1: Part A 1, 2
1.2 Select prospecting methods to match market to which the product or service is targeted	1B Select appropriate prospecting methods and target present, previous and new clients	2	LC1: Part B 1
1.3 Target present, previous and new clients through chosen prospecting methods	1B Select appropriate prospecting methods and target present, previous and new clients	3	LC1: Part B 1
1.4 Research and establish criteria for qualifying leads according to buyer accessibility, buyer motives, product affordability, purchase authority, legal compliance and return for seller	1C Research and establish criteria for qualifying prospects against which buying potential is gauged	3	LC1: Part A 3, 4, 5, 6 Part B, 2
1.5 Ensure established criteria represent a standard against which buying potential of individuals and groups is gauged	1C Research and establish criteria for qualifying prospects against which buying potential is gauged	3	LC1: Part A 3, 7 Part B 2
Element 2: Manage prospect information			

Final assessment tasks and recommended options

The final assessment provided in Aspire's print learner guide or online resource includes an overview that is laid out as follows (or similar):

To demonstrate your competency using this final assessment you must successfully complete three assessment tasks.

Complete the following task	Part A – Questioning You will demonstrate a sound knowledge of the unit requirements in your responses.
Select and complete one of the following	Part B – Project: Identifying and planning sales prospects at BizOps Enterprises You will demonstrate your skills and knowledge by completing a project using a case study or simulated environment. OR Part C – Project: Identifying and planning sales prospects at work You will demonstrate your skills and knowledge by completing a project in your workplace.
Select and complete one of the following	Part D – Observation Your work performance will be documented while being observed by an assessor. OR Part E – Third-party report Your work performance will be documented using a third-party report completed by a relevant supervisor.

Negotiating assessment tasks

It is critical that candidates understand the assessment tasks and expectations of their performance, as well as any options that may be available. Aspire's learner guides include a range of options for assessment (as outlined), depending on the unit being assessed and the characteristics of the candidate.

For example, a candidate completing assessment in a workplace (their own or via a work placement) may rely on a third-party report assessment. However, candidates completing assessment after a workshop-based program may require assessor observations in a simulated workplace task.

Candidates may also typically have the option of a verbal interview with their assessor or a written assessment (written questions) to demonstrate their knowledge of the unit being assessed. It should be noted that, even where only a written assessment option is provided, assessors may undertake this assessment in a verbal interview mode if suitable for the unit content, as a reasonable adjustment strategy.

How to use the assessment plan

Once assessment tasks and options have been discussed with the candidate, required and preferred tasks should be selected and documented in the assessment plan. An example of the assessment plan is provided here.

Assessment plan	
Training organisation name:	
Candidate name:	
Phone number:	
Date:	
Email:	
Assessor name:	
Unit of competency:	BSBSLS407 Identify and plan sales prospects, Release1
1 Assessment tasks selected:	<p>Part A – Questioning</p> <p>Select and complete one of the following:</p> <p><input type="checkbox"/> Part B – Project: Identifying and planning sales prospects at BizOps Enterprises OR</p> <p><input type="checkbox"/> Part C – Project: Identifying and planning sales prospects at work</p> <p>Select and complete one of the following:</p> <p><input type="checkbox"/> Part D – Observation OR</p> <p><input type="checkbox"/> Part E – Third-party report</p>
Ready for assessment declaration:	I confirm that the purpose and procedures of this assessment have been clearly explained to me. I have been consulted about any special needs I might have in relation to the assessment process. The criteria to be used for this assessment have been discussed with me, as have the consequences and possible outcomes of the assessment.

4.3 Assessment mapping

BSBSLS407 Identify and plan sales prospects, Release 1

Unit of competency	Part A – Questioning	Part B – Project: Scenario	Part C – Project: At work	Part D – Observation	Part E – Third-party report
Element 1: Employ prospecting methods and qualify prospects					
1.1 Identify, consider and evaluate strengths and limitations of range of primary and secondary prospecting methods		P1	P1		
1.2 Select prospecting methods to match market to which the product or service is targeted		P2	P2		
1.3 Target present, previous and new clients through chosen prospecting methods	Q2, Q3				
1.4 Research and establish criteria for qualifying leads according to buyer accessibility, buyer motives, product affordability, purchase authority, legal compliance and return for seller		P3	P3		
1.5 Ensure established criteria represent a standard against which buying potential of individuals and groups is gauged		P4	P4		
Element 2: Manage prospect information					
2.1 Develop and implement system for recording prospect information				O2	O2
2.2 Monitor and evaluate effectiveness of system for recording prospect information	Q10	P5	P5		

4.5 Completing the record of outcome

Once all required assessment tasks and options have been completed satisfactorily by the candidate, the final assessment record of outcome form must be completed.

This must be submitted to your training organisation's records administration as soon as possible after the final assessment tasks are completed and marked. An example is provided here.

Record of outcome

Training organisation name:		
Candidate name:		
Unit code and title:	BSBSLS407 Identify and plan sales prospects, Release 1	
Assessor name:		
Assessor email:		
Assessor phone number:		
Assessment tasks:		Satisfactorily completed
	Part A – Questioning	<input type="checkbox"/>
	<input type="checkbox"/> Part B – Project: Identifying and planning sales prospects at BizOps Enterprises	<input type="checkbox"/>
	OR	
	<input type="checkbox"/> Part C – Project: Identifying and planning sales prospects at work	
	<input type="checkbox"/> Part D – Observation	<input type="checkbox"/>
	OR	
	<input type="checkbox"/> Part E – Third-party report	
Declaration:	In completing this assessment, I confirm that the candidate has demonstrated all unit outcomes through consistent and repeated application of skills and knowledge with competent performance	