
Overview

This standard is about individuals working on a freelance basis or in a context where they are expected to generate business within the active leisure industry, therefore requiring more than just technical skills.

The main outcomes of this standard are:

1. plan your marketing and sales strategy
2. promote your services
3. sell your services directly to individuals
4. follow up marketing and individual enquiries

You must include the core exercise and fitness knowledge and theoretical understanding as detailed in the document SkillsActive Exercise and Fitness Core Knowledge Requirements relevant to the job role.

This standard is for freelance individuals or employed staff who have to market and sell their services to prospective individuals in the active leisure industry. They will normally be working without direct supervision.

Performance criteria

You must be able to:

Plan your marketing and sales strategy

1. plan your marketing and sales strategy
2. **research** the **market** for your services
3. develop services that will be attractive to individuals and or organisations
4. cost services at a level that will be affordable to individuals and or organisations
5. test these services with **participants**
6. learn from feedback
7. set **SMART** sales targets
8. plan how you are going to evaluate the effectiveness of your marketing and sales strategy

Promote your service

9. identify and target individuals and or organisations using a selection of **methods**
10. **present your services** so that they are attractive to individuals and or organisations
11. present an image that is unique to your services
12. make sure individuals and or organisations are made aware of your services
13. make sure individuals and or organisations understand the value and benefits of your services
14. keep track of your marketing and sales strategy
15. compare what you are achieving with your targets
16. find ways of improving your marketing and sales strategy

Sell your services directly to individuals

17. undertake proactive selling
18. offer and agree a service that meets both parties' needs
19. make sure the individual and or organisation is ready to commit to the sale
20. agree terms with the individual and or organisation

21. make sure the individual and or organisation is satisfied with the sale
22. make sure all documents are completed

Follow up marketing and individual enquiries

23. follow up marketing and individual **enquiries**
24. develop an individual service management system
25. keep the individual service management system up to date
26. keep in regular contact with existing individuals and or organisations
27. make efforts to obtain new business
28. follow all **legal and organisational procedures**

Knowledge and understanding

You need to know and understand:

Plan your marketing and sales strategy

1. how to research the market for your services
2. ways of developing services that will be attractive to individuals and or organisations
3. how to cost services at levels that will be affordable to individuals and or organisations
4. methods of testing services
5. how to develop your marketing and sales plan from feedback
6. how to develop **SMART** sales targets
7. ways of evaluating the effectiveness of your marketing and sales strategy
8. how to present a plan of your marketing and sales service

Promote your service

9. **methods** of identifying and targeting individuals and or organisations
10. ways of presenting your services so that they will be attractive to individuals and or organisations
11. how to develop an image that is unique to you
12. how to ensure individuals and or organisations are aware of your services
13. how to convince individuals and or organisations of the value and benefits of your services
14. **systems of tracking** marketing and sales
15. ways of comparing targets
16. how to improve your marketing and sales strategy

Sell your services directly to individuals

17. different **selling techniques**
18. how to offer and agree a service that meets both parties' needs
19. how to confirm the individual and or organisation is ready to complete the sale

20. why it is important to agree terms and conditions with the individual and or organisation prior to a sale
21. how to ensure the individual and or organisation is satisfied with the sale
22. how to complete the sales documentation

Follow up marketing and individual enquiries

23. the features of an up-to-date **individual service management system**
24. how to keep an **individual service management system** up to date
25. how to keep in regular contact with existing individuals
26. how to obtain new business
27. the **legal and organisational procedures** for data protection

**Scope/range related Research, to
to performance
criteria**

1. identify existing and new trends in the industry
2. analyse your own strengths and weaknesses
3. identify your competitors
5. analyse the strengths and weaknesses of your competitors
5. identify the types of individuals and or organisations who might be interested in your services
6. identify the benefits that individuals and or organisations are looking for

Market

1. existing
2. new

Participants

1. individual customers
2. customer groups
3. customers with specific needs

SMART

1. specific
2. measurable
3. achievable
4. result focused
5. time bound

Methods

Plan, market and sell services in Active Leisure

1. personally
2. through other people
3. through advertising materials
4. via social media

Present your services

1. talking to people directly
2. using printed materials
3. electronically
4. via social media

Enquiries

1. keep in regular contact
2. provide information on new and existing services
3. respond promptly
4. respond positively

Legal and organisational procedures (to cover a minimum of 4)

1. Health and Safety at Work Act
2. Control of Substances Hazardous to Health
3. Reporting of Injuries, Diseases and Dangerous Occurrences Regulations
4. Electricity at Work Regulations
5. First Aid Regulations
6. individual organisational policies and procedures

Scope/range related to knowledge and understanding **SMART**

1. specific
2. measurable
3. achievable
4. result focused
5. time bound

Methods

1. personally
2. through other people
3. through advertising materials
4. via social media

Systems of tracking

1. manual or hand-written
2. IT-based

Selling techniques

1. reactive
2. proactive

Individual service management system

1. off the peg
2. bespoke

Legal and organisational procedures

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Values

The following values underpin the Exercise and Fitness National Occupational Standards

Exercise Professionals should:

1. demonstrate and promote a responsible lifestyle and conduct, by actively discouraging the use of performance enhancing drugs, and any other illegal substance
2. maintain confidentiality
3. deal openly and in a transparent manner with participants; respecting their participants' needs at all times
4. seek to adopt the highest level of professional standards in all areas of their work and the development of their career

Behaviours

The following behaviours underpin the Exercise and Fitness National Occupational Standards

Exercise Professionals should:

1. seek to nurture healthy relationships with participants and other health professionals by supporting, coordinating and managing the fitness/exercise process effectively, keeping the participant at the centre of the process
2. be aware of the roles of supporting personnel in the healthcare professions and recognise when to refer issues to these specialists
3. be aware of responsibilities and liabilities under equality, diversity and inclusion legislation and industry codes of practice
4. aim to empower participants; supporting their right to make choices, discover their own solutions, and enable them to participate and develop at their own pace and in their own way
5. identify and recognise the participants' needs at the start of the process
6. aim to improve participants' confidence, self-esteem and fitness levels
7. reflect on own practice and always seek ways to improve their own fitness and exercise ability, skills and knowledge
8. establish a rapport with participants
9. show empathy and sensitivity to participants' goals and current stage of readiness
10. present a positive image of oneself and their organisation to participants
11. develop an effective working relationship with participants
12. clearly define the roles and responsibilities of other professionals who may be involved
13. communicate clearly with participants in a way that makes them feel valued

14. show sensitivity and empathy to the participants and the information they provide

Skills

The following skills underpin the Exercise and Fitness National Occupational Standards

Exercise Professionals should:

1. systematically prepare for all activities ensuring the health, safety and welfare of their participants
2. ensure there is differentiation and inclusion that can enable participants with particular needs and of various abilities to participate in sessions and programmes. The needs of participants with a disability should be considered and, where possible, their needs met
3. implement ground rules for behaviour during the session
4. explain their role and responsibilities to participants
5. identify any barriers to participation
6. encourage participants to find a solution to their barriers
7. identify participants' readiness to participate
8. identify and agree strategies to prevent drop out or relapse
9. use instructing styles that match participants' needs
10. adapt their relationship with participants to meet their changing needs
11. listen to and ask the participants questions to check their understanding
12. identify what information they need to collect about their participants
13. collect information about their participants using approved methods
14. record the information in a way that will help with analysing it
15. use communication techniques and appropriate responses when dealing with conflict
16. recognise discriminatory behaviour and know the procedures to follow in case of any incidents

Glossary

Individual service management system

A system that ensures customers' records are kept in a manageable and accessible format, which allows you to build better relationships with customers.

Proactive Selling

Also known as 'active' selling. Proactive selling is taking the initiative and

acting first, instead of responding to outside events and situations. It means taking control of the whole selling process, from initiation to conclusion.

Links to other NOS This standard links with SKAEF16 and SKAEF17.

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Developed by SkillsActive

Version Number 2

Date Approved December 2014

Indicative Review Date April 2018

Validity Current

Status Original

Originating Organisation SkillsActive

Original URN SA44NB242

Relevant Occupations Associate Professionals and Technical Occupations; Leisure, travel and tourism; Sport, leisure and recreation; Sports and Fitness Occupations

Suite Exercise and fitness

Keywords Plan; market; sell; services; active; leisure;
