
Overview

Working on a freelance basis or in a context where you are expected to generate business requires more than just technical skills. You may have the highest quality services available, but unless prospective clients are aware of these and their value, neither you, nor they, will benefit. To be successful you must be able to plan and market your services in an attractive way and be able to clinch a sale with the client.

The standard is divided into two parts. The first part describes the four things you have to do. These are:

1. plan your marketing and sales
2. market your services
3. sell your services directly to clients
4. follow up marketing and client enquires

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

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Performance criteria

You must be able to:

Plan your marketing and sales

- P1 research the market for your services
- P2 identify existing and new trends in the industry
- P3 identify your competitors and analyse their strengths and weaknesses compared to yours
- P4 identify the types of client who might be interested in your services and the benefits they are looking for
- P5 develop and cost services that will be attractive to your potential clients
- P6 test these services with other people and learn from their feedback
- P7 set yourself realistic and achievable marketing and sales targets within reasonable timescales
- P8 decide how you are going to evaluate your marketing and sales

You must be able to:

Market your service

- P9 identify the best ways to reach your potential clients
- P10 present your services so that they are attractive to potential clients
- P11 make sure your potential clients hear about your services and understand their value and benefits
- P12 keep track of your marketing and sales and compare what you are achieving with your targets
- P13 find ways of improving your marketing and sales

You must be able to:

Sell your services directly to clients

- P14 identify your client's needs and expectations
- P15 suggest services that meet your client's needs and expectations
- P16 provide information about your services and their benefits clearly, accurately and in a way that will motivate your client to take them up
- P17 give the client a full opportunity to ask questions and discuss your services and their benefits and if necessary, think about their decision
- P18 identify buying signals from the client and use these to move the sale on
- P19 offer and agree a service that meets the client's needs and your own
- P20 make sure the client is ready to commit themselves to the sale
- P21 agree terms with the client and make sure they are satisfied with the sale
- P22 make sure all relevant documents are completed

You must be able to:

Follow up marketing and client enquires

- P23 develop and keep up-to-date a client service management system
- P24 keep in regular contact with your existing clients and with those who have made enquiries
- P25 provide them with information on new and existing services
- P26 respond promptly and positively to further enquiries and make efforts to

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obtain new business

P27 follow all legal and organisational requirements for data protection

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Knowledge and understanding

You need to know and understand:

Plan your marketing and sales

- K1 why it is important to plan marketing and sales
- K2 where you can find out information about your market
- K3 how your market is segmented – divided, for example, by age, income, lifestyle and image, buying habits, occupation and social class, the benefits that potential clients are looking for etc.
- K4 how to assess the market for your services taking account, for example, of the price of your services, how to promote the service, customer needs and expectations, trends in the industry etc.
- K5 how to identify your competitors and their strengths and weaknesses
- K6 how to identify your own strengths and weaknesses
- K7 how to develop services that address a certain ‘niche’ in the market
- K8 how to cost your services and develop marketing and sales plans that take account of cash flow and tax considerations
- K9 the importance of testing your proposed products and services with other people and how to do so
- K10 the importance of having realistic (in terms of the income you need) and achievable targets for your marketing and sales
- K11 how to develop sales and marketing targets
- K12 the importance of being able to evaluate your sales and marketing plans and how to develop ways of monitoring and evaluating marketing and sales

You need to know and understand:

Market your service

- K13 how to identify the best ways of reaching your potential clients, for example by approaching likely clients directly, by using other staff to approach clients on your behalf, by advertising materials etc.
- K14 the ‘image’ your clients may have of the types of services you offer and how to develop an image that is unique to you
- K15 how to present your services so that they and their benefits will be attractive to clients
- K16 different ways you can present your services, for example by having leaflets printed, by preparing ‘scripts’ so that you or others can approach clients directly, by commissioning advertisements, by developing website materials
- K17 the importance of being proactive in your marketing – making every effort to reach your potential clients and convincing them of the value and benefits of your services
- K18 the importance of constantly monitoring your marketing and sales activities and outputs and finding ways to overcome problems and improve what you do

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K19 methods of monitoring marketing and sales

You need to know and understand:

Sell your services directly to clients

- K20 the importance of being proactive in selling without giving the impression of 'the hard sell' and how to do so
- K21 why it is important to correctly identify your client's needs and expectations in relation to the services you offer
- K22 how to identify services that match or come close to your client's needs and expectations
- K23 the importance of having as much information, or sources of information, about your services and their benefits available
- K24 how to communicate about your services and their benefits clearly and in a way that will motivate your clients to take them up
- K25 the importance of being accurate in the information you provide – especially in relation to legal requirements covering trade descriptions and sale of goods
- K26 the importance of giving clients the opportunity to ask questions and discuss your services and their benefits
- K27 the types of buying signals that a client might give that will help you to move the sale on and how to use these
- K28 the importance of being able to negotiate services that meet the client's needs and your own and how to negotiate a sale
- K29 how to confirm the client is ready to complete the sale without making them feel rushed and why this is an important stage
- K30 why it is important to agree terms with the client and how to do so
- K31 the relevant documents that need to be completed and why these are important

You need to know and understand:

Follow up marketing and client enquires

- K32 the importance of keeping up to date information on marketing and client enquiries
- K33 the features of a client service management system and how to choose a method that is most appropriate to you and your business
- K34 the legal and organisational requirements for data protection and how to ensure that you follow these

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Additional Information

Scope/range related to performance criteria

1. **market**
 - 1.1. existing
 - 1.2. new

2. **best ways to reach potential clients**
 - 2.1. personally
 - 2.2. through other people

3. **ways to present your services**
 - 3.1. talking to people directly
 - 3.2. using printed materials
 - 3.3. electronically

4. **information**
 - 4.1. spoken
 - 4.2. written
 - 4.3. electronic

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