

## ASTSRP8

### Obtain instructions and agree a marketing plan towards selling individual properties



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#### Overview

This standard is about obtaining instructions from sellers regarding the sale of their property, and then agreeing with them a marketing plan towards achieving the sale. It includes preparing and holding sales discussions, during which any questions or concerns are handled effectively, such that customers' commitment is realised.

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### Performance criteria

### Obtain sales instructions regarding property

*You must be able to:*

- P1 provide clear, accurate and relevant information regarding local property market conditions, relating these clearly to the customer's circumstances regarding their property for sale
- P2 explain clearly and accurately to the customer:
  - 2.1 the available methods for selling their property
  - 2.2 the associated marketing activities,
  - 2.3 the associated costs to the customer, and their relative advantages and any disadvantages, relating these clearly to the customer's circumstances regarding their property for sale
  - 2.4 disclosure of any fees other than agency terms fees
- P3 describe accurately the features of your organisation's selling service including prices and costing which match the customer's needs, and the procedures for undertaking the sale and provide written copies of terms and conditions
- P4 identify and address correctly, any aspects of your organisation's service which does not meet your customer's requirements
- P5 present information clearly, concisely and accurately, and in ways which promote understanding
- P6 listen actively, encouraging questions and checking the customer's understanding
- P7 identify any verbal and non-verbal buying signals provided by your customer, and act on them accordingly
- P8 agree with your customer the most appropriate method of selling the property, and identify clearly your organisation's associated terms and costs to the customer and any circumstances in which extra charges/dispersements might be incurred
- P9 identify any potential conflicts of interest that might arise in selling the property, and address these correctly
- P10 identify, explore and prioritise any concerns that your customer may have regarding the selling of their property, and determine how these may be addressed, wherever possible and in line with your organisation's procedures
- P11 obtain sales instructions by gaining the commitment of your customer
- P12 demonstrate respect for your customer, maintaining acceptable professional standards of appearance and behaviour in all dealings with your customer
- P13 comply with all relevant legislation, guidelines and codes of practice

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#### Agree a marketing plan for the property

*You must be able to:*

- P14 confirm all relevant information regarding the property to be sold, including its principal selling features and the possession of an Energy Performance Certificate
- P15 review the outcomes of different marketing activities used in the selling of similar types of property, and identify the factors likely to impact upon the success of these and other marketing activities in selling your customer's property
- P16 explore with your customer those activities which are likely to be the most effective in selling their property, explaining their principal features and benefits, and relating these to the customer's circumstances regarding their property for sale
- P17 identify and agree with the seller the resources available for marketing the property
- P18 agree and confirm in writing with your customer those marketing activities to be used in the selling of their property
- P19 plan the timing and sequence of the agreed marketing activities towards ensuring that these have the greatest positive impact
- P20 prepare a marketing plan which sets out clearly and accurately the method of sale, the agreed marketing activities and an associated schedule and budget
- P21 agree the marketing plan with all relevant colleagues where necessary present the plan clearly and accurately to your customer, answering correctly any questions which they may have, and confirming your customer's acceptance of its content
- P22 maintain complete, accurate and up to date records of all relevant details agreed with your customer
- P23 ensure that the marketing plan is progressed, in line with your organisation's procedures

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### Knowledge and understanding

*You need to know and understand:*

#### Obtain sales instructions regarding property

- K1 relevant legislation, guidelines and codes of practice relevant to obtaining instructions and agreeing a marketing plan for the selling of property, and their impact for your area of operations
- K2 your organisation's services towards selling property and the associated marketing activities and cost structure
- K3 your organisation's procedures for obtaining instructions and for developing and progressing marketing plans for residential property
- K4 different methods for selling residential property, including private treaty, auction, tender and sealed bids, their relative advantages and disadvantages, and typical costs associated with different sales methods and marketing activities
- K5 the principal types of marketing activities, including advertising, the use of different materials and mail shots and e-shots, and the use of different distribution channels, their relative advantages and disadvantages and the factors to consider when selecting those activities which are likely to be the most successful
- K6 different types of buyers, and how different marketing activities might be more successful than others in promoting different types of properties
- K7 the purpose and overall content of Home Reports or Energy performance Certificates, and the circumstances where they are required
- K8 changes affecting your local property market and their impact for the properties being marketed

#### Agree a marketing plan for the property

*You need to know and understand:*

- K9 how to conduct and structure an effective sales presentation when seeking to obtain instructions
- K10 the difference between features and benefits, and how to use these effectively
- K11 typical verbal and non-verbal buying signals that customers might provide, and how to respond to these effectively
- K12 the importance of explaining your organisation's terms and conditions clearly and correctly, and of ensuring that sellers sign the relevant agreement when gaining their commitment
- K13 the importance of checking customers' understanding and methods of doing this
- K14 typical questions and concerns that vendors might raise regarding the marketing and selling of their property, and how to address these constructively
- K15 the types of conflict of interest that can arise when selling property, and how these should be addressed

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- K16 the principal types of buyers of residential property, and the factors affecting their potential interest in different properties
- K17 the importance of maintaining acceptable professional standards of appearance and behaviour in all dealing with customers in line with organisational requirements

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**Developed by** Asset Skills

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**Originating organisation** Asset Skills

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**Relevant occupations** Retail and commercial enterprise; Service enterprises; Sales and Customer Services Occupations; Sales Related Occupations

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**Suite** Sale of Residential Property

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**Key words** Preparing; identify; customer's requirements; prioritise; behaviour

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