Pearson
BTEC Level 2 Certificate in Principles of Trade Business Services

Specification

BTEC Specialist qualification

First teaching September 2013

Issue 2

Edexcel, BTEC and LCCI qualifications

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at qualifications.pearson.com. Alternatively, you can get in touch with us using the details on our contact us page at qualifications.pearson.com/contactus

About Pearson

Pearson is the world's leading learning company, with 35,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

This qualification was previously known as:

Pearson BTEC Level 2 Certificate in Principles of Trade Business Services (QCF)

The QN remains the same.

References to third party material made in this specification are made in good faith. Pearson does not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)

All information in this specification is correct at time of publication.

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Summary of Pearson BTEC Level 2 Certificate in Principles of Trade Business Services specification Issue 2 changes

Summary of changes made between previous Issue 1 and this current Issue 2	**Section number**
All references to QCF have been removed throughout the specification	Throughout
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
TQT value added	Section 2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	Section 2
Reference to credit transfer within the QCF removed	Section 5
QCF references removed from unit titles and unit levels in all units	Section 12
Guided learning definition updated	Section 12

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

The purpose of a specification as defined by Ofqual is to set out:

- the qualification’s objective
- any other qualification that a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding that the learner is required to have before taking the qualification
- units that a learner must have completed before the qualification will be awarded and any optional routes
- any other requirements that a learner must have satisfied before they will be assessed or before the qualification will be awarded
- the knowledge, skills and understanding that will be assessed as part of the qualification (giving a clear indication of their coverage and depth)
- the method of any assessment and any associated requirements relating to it
- the criteria against which the learner’s level of attainment will be measured (such as assessment criteria)
- any specimen materials
- any specified levels of attainment.

1 Introducing Pearson BTEC Specialist qualifications

BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

Sizes of Specialist qualifications

For all regulated qualifications, Pearson specify a total number of hours that it is estimated learners will require to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

BTEC Specialist qualifications are generally available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

2 Qualification summary and key information

Qualification Number (QN)	601/1224/4
Regulation start date	05/09/2013
Operational start date	01/10/2013
Approved age ranges	16–18 19+
Credit value	13
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	130
Guided learning hours	108
Grading information	The qualification and units are at pass grade
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the Pearson access and recruitment policy (see *Section 10 Access and recruitment*)

Qualification number and qualification title

Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. The qualification title, unit titles and QN are given on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in our *UK Information Manual,* available on our website, qualifications.pearson.com

Objective of the qualification

The Pearson BTEC Level 2 Certificate in Principles of Trade Business Services is for learners who work in, or want to work in, a trade business environment.

It gives learners the opportunity to:

- develop knowledge related to customer service in a trade business environment, including understanding the customer relationship, sales techniques and telephone and email communications
- learn about health and safety in a trade business environment, computer-aided kitchen design and stock management
- achieve a nationally-recognised Level 2 qualification
- develop their own personal growth and engagement in learning.

Apprenticeships

Skillsmart Retail UK Ltd approves the Pearson BTEC Level 2 Certificate in Principles of Trade Business Services as a knowledge component for the Intermediate Apprenticeship in Trade Business Services.

Relationship with previous qualifications

This qualification is a direct replacement for the Pearson BTEC Level 2 Award in Trade Business Services, which has now expired. Information about how the new and old units relate to each other is given in *Annexe B*.

Progression opportunities through Pearson qualifications

Learners who have achieved the Certificate can progress to the Pearson BTEC Level 3 Award in Retail Knowledge or the Pearson BTEC Level 3 Award in Principles of Business and Administration.

Industry support and recognition

This qualification is supported by Skillsmart Retail UK Ltd, the Sector Skills Council for retail.

3 Qualification structure

Pearson BTEC Level 2 Certificate in Principles of Trade Business Services

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits that must be achieved	13
Number of mandatory credits that must be achieved	11
Number of optional credits that must be achieved	2

1	J/505/3432	Understanding How to Deliver Customer Relationships in Trade Business Services	2	5	40
2	R/505/3434	Health and Safety Awareness in a Working Environment	2	3	24
3	D/602/4769	Understanding Employment Responsibilities and Rights	2	3	30
4	Y/505/3435	Understanding the Use of Email in Business to Business Communication	2	2	14
5	D/505/3436	Understanding How to Manage Stock for Customer Orders in Business to Business Services	2	2	14
6	H/505/3437	Understanding Sales Function for Business to Business Services	2	3	24
7	K/505/3438	Understanding the Use of Telephone Communications for Business to Business Services	2	2	14
8	M/505/3439	Understanding the Use of IT Software for Targeting Customers in Business to Business Services	2	2	14
9	H/505/3440	Sales Operations	2	3	20
10	K/505/3441	Understanding How to Use Computer Aided Design Software	2	3	30

4 Assessment

The table below gives a summary of the assessment methods used in the qualification.

Units	Assessment method
All units	Centre-devised assessment

Centre-devised assessment (internal assessment)

Each unit has specified learning outcomes and assessment criteria. To pass an internally assessed unit, learners must meet all the learning outcomes. Centres may find it helpful if learners index and reference their evidence to the relevant learning outcomes and assessment criteria.

Centres need to write assignment briefs for learners to show what evidence is required. Assignment briefs should indicate clearly which assessment criteria are being targeted.

Assignment briefs and evidence produced by learners must meet any additional requirements in the *Information for tutors* section of the unit.

Unless otherwise indicated in *Information for tutors*, the centre can decide the form of assessment evidence (for example, performance observation, presentations, projects, tests, extended writing) as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria.

Centres are encouraged to give learners realistic scenarios and maximise the use of practical activities in delivery and assessment.

To avoid over-assessment, centres are encouraged to link delivery and assessment across units.

There is more guidance about internal assessment on our website. See *Section 13 Further information and useful publications*.

5 Recognising prior learning and achievement

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. If the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website, qualifications.pearson.com

6 Centre resource requirements

As part of the approval process, centres must make sure that the resources requirements below are in place before offering the qualification.

General resource requirements

- Centres must have appropriate physical resources (for example, equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies in place relating to the use of equipment by learners.
- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 10 Access and recruitment* and *Section 11 Access to qualifications for learners with disabilities or specific needs*. For full details on the Equality Act 2010, please go to the Home Office website, www.gov.uk/government/organisations/home-office

Specific resource requirements

As well as the general requirements above, there are specific resource requirements that centres must meet:

Unit	**Resources required**
10: Understanding How to Use Computer Aided Design Software	Computer aided design software

7 Centre recognition and approval centre recognition

Centres that have not previously offered Pearson qualifications need to apply for, and be granted, centre recognition as part of the process for approval to offer individual qualifications.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver Pearson BTEC qualifications is available at qualifications.pearson.com

Approvals agreement

All centres are required to enter into an approval agreement that is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any associated codes, conditions or regulations. Pearson will act to protect the integrity of the awarding of qualifications. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of approval.

8 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses Pearson BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model will follow one of the processes listed below.

1 Delivery of the qualification as part of a BTEC apprenticeship (‘single click’ registration):

    - an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions

2 Delivery of the qualification outside the apprenticeship:

    - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
    - Lead Internal Verifier accreditation. This involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, we will annually allocate annually a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details, go to the *UK BTEC Quality Assurance Handbook* on our website.

9 Programme delivery

Centres are free to offer the qualifications using any mode of delivery (for example full time, part time, evening only, distance learning) that meets their learners' needs.

Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to make sure a course is relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector
- giving learners the opportunity to apply their learning in practical activities
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- making full use of the variety of experience of work and life that learners bring to the programme.

Centres must make sure that any legislation taught is up to date.

10 Access and recruitment

Pearson's policy regarding access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all those wishing to access the qualifications.

Centres are required to recruit learners to Pearson BTEC Specialist qualifications with integrity.

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

Centres should review the applicant's prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

For learners with disabilities and specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in *Section 11 Access to qualifications for learners with disabilities or specific needs*.

Learners may be aged between 14 and 16 and therefore potentially vulnerable. Where learners are required to spend time and be assessed in work settings, it is the centre's responsibility to ensure that the work environment they go into is safe.

11 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires all learners to have equal opportunity to access our qualifications and assessments. It also requires our qualifications to be awarded in a way that is fair to every learner.

We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Learners taking a qualification may be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

Further information regarding Access Arrangements can be found in the Joint Council for Qualifications (JCQ) document Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications. Further details on how to make adjustments for learners with protected characteristics are given in the Pearson Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units.

The documents are on our website at qualifications.pearson.com

12 Units

Units have the following sections.

Unit title

This is the formal title of the unit that will appear on the learner's certificate.

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors defined by Ofqual, the qualifications regulator.

Credit value

When a learner achieves a unit, they gain the specified number of credits.

Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

Unit aim

This gives a summary of what the unit aims to do.

Essential resources

This section lists any specialist resources needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

Learning outcomes

The learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

Assessment criteria

Assessment criteria specify the standard required by the learner to achieve each learning outcome.

Unit amplification

This section clarifies what a learner needs to know to achieve a learning outcome.

Information for tutors

This section gives tutors information on delivery and assessment. It contains the following subsections:

- *Delivery* – explains the content's relationship to the learning outcomes and offers guidance on possible approaches to delivery.
- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria.
- *Indicative resource materials* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

Unit 1: Understanding How to Deliver Customer Relationships in Trade Business Services

Unit reference number: J/505/3432

Level: 2

Credit value: 5

Guided learning hours: 40

Unit aim

The purpose of this unit is to provide learners with knowledge of customer relationships and their customers' expectations in the trade business sector. Learners will develop knowledge of the part that customer service practitioners are expected to play in delivering customer relationships in trade business organisations, best practice in the development of customer relationships, and the impact legislation and regulation have on customer relationships.

This unit aims to develop and broaden learners' understanding of customer relationships in the trade business sector. Learners will look into the different types of internal and external customer relationships and the specific needs that each may have. It is also important to understand how organisations set internal policies and procedures to ensure that customer relationship standards are maintained by staff.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand customer relationships	1.1	Describe the difference between internal and external customer relationships	□ External customers: new customers, account customers, repeat custom. □ Internal customers: other departments, other branches. □ Different behaviour and communication style required for internal and external customers.
		1.2	Explain the characteristics of a customer relationship in the trade business sector	□ Customer relationships, how to go the extra mile to deliver more, how to use the appropriate language and techniques to avoid undermining customer relationships.
		1.3	Describe why customer relationships are important in the trade business sector	□ The role of the customer in sustaining loyalty; growing new business through satisfaction and identifying opportunities for new products and services.
		1.4	Describe actions that may exceed customer relationship expectations to build customer loyalty	□ Customer expectations, different behaviours and culture, the range of communication styles and methods adopted, leads to repeat transactions and loyalty.
		1.5	Describe actions that undermine the customer relationship	□ Undermining customer relationships (attitude, presentation and communication of information, hostility, faulty products and poor service).

2	Understand how a customer relationship is developed	2.1	Identify different job roles involved in the delivery of the customer relationship	▫ Job roles and their contribution to building customer relationships (management, counter sales, warehouse, administration, design, sales and business development).
		2.2	Compare different responsibilities of people in the organisation to develop and maintain customer loyalty	▫ Different roles within the organisation and how each role contributes to and maintains customer loyalty.
		2.3	Describe what actions are required to deliver the customer relationship	▫ Techniques for dealing with customers (acknowledge, listen, answer, confirm). ▫ Overcoming objections (define, identify, prove, agree, desire, action (DIPADA) understanding functions of the product or service that is being sold).
		2.4	Describe how behaviour impacts on the customer experience	▫ Developing customer relationships *(*body language, verbal and non-verbal communication, making an impression smile, eye contact, appearance, introduction).
		2.5	Identify customer service issues that can affect customer relationships	▫ Common factors that can add value to building customer relationships and those that are likely to limit or adversely affect customer relationships.

3	Understand how to communicate effectively in a trade business organisation	3.1	Describe how to greet a customer in line with organisational requirements	▫ Greeting customers – eye contact, smiling, approachable, listening to needs, putting customers at their ease.
		3.2	Describe how to use positive communication techniques within the customer relationship	▫ Key communication techniques, eg body language, appropriate wording, both written and oral, facial expressions, prior customer knowledge and etiquette.
		3.3	Describe how to show customers respect in line with organisational requirements	▫ Application of the principles of communication and the impact of company guidelines and requirements on written communication.
		3.4	Describe how to use communication skills to close a sale in line with organisational requirements	▫ The importance of following organisational guidelines in closing a sale, using correct language, appropriate processes and procedures and follow-up activities.
4	Understand how organisational customer service procedures contribute to growing and sustaining customer relationships	4.1	Describe how teamwork contributes to the customer relationship in an organisation	▫ Impact of organisational customer service rules and processes on individual and collective roles and responsibilities within a team. ▫ Team loyalty. ▫ Team contributions. ▫ Understanding impact of acts and omissions within the team on growing and sustaining customer relationships.
		4.2	Assess how organisational procedures grow and sustain the customer relationship	▫ How organisations develop policies and procedures to maintain their customer base through effective after-sales services.

5	Understand legislative requirements that apply to customer relationships	5.1	Identify the legislative requirements to protect customer data	◻ Data Protection Act. ◻ Freedom of Information Act. ◻ Other relevant legislation.
		5.2	Describe how to protect the security of customer information in line with organisational procedures	◻ How the Data Protection Act applies in the organisation's policies and procedures.
		5.3	Identify how consumer legislation safeguards the trade business customer in relation to • credit agreements • faulty goods • description of goods	◻ How the following can protect customers during and after trade business transactions: • Sale of Goods Act 1979 • Consumer Credit Act 1974 • Supply of Goods and Services Act 1982 • Misrepresentation Act 1967
		5.4	Describe how the organisation meets consumer legislative requirements	◻ The organisation's procedures in relation to the application of: • Sale of Goods Act 1979 • Consumer Credit Act 1974 • Supply of Goods and Services Act 1982 • Misrepresentation Act 1967
		5.5	Identify how equality and diversity legislation applies to customer relationships in the trade business sector	◻ Discrimination, body language, written and oral communication, stereotypes.
		5.6	Describe how to apply equality and diversity legislative requirements when dealing with customers	◻ Customer base, including local, regional and national diversities. ◻ Application of the Equality Act 2010 and the organisation's policies in relation to it.

Information for tutors

Delivery

All the outcomes lend themselves to flexible delivery. Formal training sessions should have input from the trainer/assessor to identify the theoretical material and standard information but the learner can work individually or in a group researching and gathering information about the customer service approaches and policies provided by the company. Researching the company's policies and practices regarding customer service, observation of customer service interactions, and discussions all offer interactive approaches to learning about the products and services. Learners will be expected to have some knowledge of the legislative requirements in respect of data, product descriptions, sale and return of goods and the creation of credit agreements.

The learner will be introduced to the customer relationship, how it works and what their role is in within a team approach to secure consistently high levels of customer service within the organisational culture and approach adopted by the company.

Discussions, role play and other active training techniques provide motivational and interactive activities. By shadowing experienced members of the customer service team, learners will be able to see how to communicate with customers, build rapport, and sell products and services within the legislative and organisational constraints.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Suggested resources

Textbooks

Bradley, Sally – *NVQ/SVQ Level 2 Customer Service Candidate Handbook* (Heinemann Workbased Learning, 2011) ISBN 9780435046897

Schmitt, Bernd H. – *The Customer Experience Management: A Revolutionary Approach to Connecting with Your Customers* (John Wiley & Sons, 2003) ISBN 9780471237747

Other

BTEC Apprenticeship Customer Service Delivery Guide, ISBN 9781446900222 download from qualifications.pearson.com

Websites

www.customerservicemanager.com - Customer service articles.

http://www.skillscfa.org/images/pdfs/research/lmi/Customer%20Service%20LMI%20[2012].pdf Customer Service Labour Market Report 2012, Skills CFA.

Unit 2: Health and Safety Awareness in a Working Environment

Unit reference number:	**R/505/3434**
Level:	**2**
Credit value:	**3**
Guided learning hours:	**24**

Unit aim

The purpose of this unit is to provide learners with an understanding of the possible health and safety issues and risks that may occur in a working environment. It aims to equip learners with an awareness of the potential hazards in a work environment, how to report these hazards and to whom and the correct procedures for dealing with any health and safety issues as they occur within the limits of their own role.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the organisation's Health and Safety Policy	1.1	Identify the personnel responsible for Health and Safety	▫ Individual responsibility and name individuals with specific responsibilities for health and safety.
		1.2	Describe the Health and Safety procedures for the organisation	▫ Health and safety policy, risk assessment, manual handling, lifting, VDU (Visual Display Unit), RIDDOR 2013 (Reporting of Injuries, Diseases and Dangerous Occurrences Regulations), COSHH 2002 (Control of Substances Hazardous to Health).
2	Understand where potential hazards can occur in the workplace	2.1	Describe potential hazards in the workplace environment	▫ Machinery, vehicles, storage and electrical equipment.
		2.2	Identify potential hazards associated with working practices	▫ Slips and falls. ▫ Manual handling and safe lifting. ▫ Office equipment (guillotines, photocopiers, IT equipment, shredders etc). ▫ Hazardous substances.
		2.3	Describe the process of risk assessment	▫ Identification of risk, analysis of risk, prevention and training.

3	Know how to maintain a safe working environment	3.1	Explain the role that good housekeeping plays in maintaining a safe working environment	◻ Cleanliness and tidiness, safe storage, use of handrails, keeping alleyways and doors clear.
		3.2	Describe ways of ensuring the working environment is safe	◻ Training, signage, health and safety policy, induction, safe storage, observation, and personal responsibility.
4	Understand the individual's responsibility for Health and Safety at work	4.1	Explain the importance of using personal protective equipment	◻ Storage, accident prevention, sight and hearing loss, avoiding slips and falls.
		4.2	Outline the correct procedures for manual handling	◻ How to lift correctly and store correctly.
		4.3	Outline the correct procedures for the use of display screen equipment	◻ Installation, screen colour and brightness, font, height, light source.
		4.4	Explain why it is important to report all accidents, diseases and dangerous occurrences in the workplace	◻ Reduce risk of repetition, safety of others, criminal and civil liability and risk assessment.
5	Understand the procedures for fire prevention and emergency evacuation	5.1	Outline the correct procedure for evacuating the premises in an emergency	◻ Fire exits, assembly points, emergency procedures, who to contact, fire marshals.
		5.2	Describe the key elements of fire prevention	◻ Safe storage of chemicals, fire blankets, electrical wiring, storage, cigarette smoking.
		5.3	Explain the process for raising the alarm in the event of fire	◻ Sprinkler systems, break glass, fire marshals, fire assembly points, fire exits, fire brigade.

Information for tutors

Delivery

All the outcomes lend themselves to flexible delivery. Formal training sessions should have input from the trainer/assessor to identify the theoretical material and standard information but the learner can work individually or in a group researching and gathering information on health and safety, by researching the company's health and safety policies and practices and the role of the HSE, for example. Learners will be expected to have some knowledge of the legislative requirements in respect of health and safety and should be able to describe how they affect organisations.

The learner will be introduced to health and safety, how it works and why it is important that all individuals and organisations operate in a safe way, having due regard for themselves and others.

Discussions, role play and other active training techniques provide motivational and interactive activities. By shadowing experienced members of the team, learners will be able to see how health and safety is enforced in the organisation.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Suggested resources

Textbooks

Bradley, Sally – *NVQ/SVQ Level 2 Customer Service Candidate Handbook* (Heinemann Workbased Learning, 2011) ISBN 9780435046897

HSE – *Your health, your safety. A brief guide for workers.* (HSE, 2013) ISBN 978 0 7176 6465 8

Websites

www.hse.gov.uk - Health and Safety Executive

Unit 3: Understanding Employment Responsibilities and Rights

Unit reference number: **D/602/4769**

Level: **2**

Credit value: **3**

Guided learning hours: **30**

Unit aim

This unit supports learning of employment rights and responsibilities across all occupations and sectors.

Learners should be aware of and conversant with the rules, principles and regulations governing employment rights and responsibilities to ensure they understand the conditions under which they work. This understanding protects both the employee and the employer, ensuring that work practice is undertaken in a mutually respectful and safe environment.

This unit is intended to cover the requirements of Employment Rights and Responsibilities within the *Specification of Apprenticeship Standards for England*. The unit has been designed to be applied to a working context.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know the statutory rights and responsibilities of employees and employers within own area of work	1.1	Outline employee rights and responsibilities under Employment Law	▫ Difference between rights and responsibilities; current employment legislation.
		1.2	Describe how related legislation can support employees in the workplace	▫ Current anti-discrimination legislation, eg gender, race, religion, disability, age; working hours and holiday entitlement; data protection; other relevant examples.
		1.3	Describe employer responsibilities in the workplace	▫ Duty of care to employees, eg safe and healthy workplace, public liability insurance; appropriate training and development; adhere to terms of contract.
		1.4	Identify sources and types of information and advice on own employment rights and responsibilities	▫ HR department; line manager; trade union representative; professional body; Citizens Advice Bureau; community legal advice; internet; trade magazines and journals.

2	Understand agreed ways of working that protect own relationship with employer	2.1	Explain the terms and conditions of own contract of employment	□ Terms and conditions; hours; pay rate; holiday entitlement; format of contract.
		2.2	Describe information shown on own pay statement	□ Gross wages; deductions; net pay; personal information, eg national insurance number, employee number.
		2.3	Explain the procedures to follow in event of a grievance	□ Grounds for grievance; informal approach; formal procedure within own workplace.
		2.4	Identify the personal information that must be kept up to date with own employer	□ Personal data, eg name, address, telephone number(s), qualifications, national insurance number, tax code, bank details, disabilities, employment history, absence details, training. □ Personal responsibility; data protection considerations.
		2.5	Explain agreed ways of working with employer	□ Workplace procedures for leave entitlement, eg holiday, maternity, paternity, compassionate; procedures to deal with bullying or discrimination; procedures for self-certification.

3	Know how own role fits within the wider context of the sector	3.1	Describe the effect of own role on service provision	□ Own job description, organisation's aim.
		3.2	Describe how own role links to the wider sector	□ Aims and objectives of the employment sector.
		3.3	Describe the main roles and responsibilities of representative bodies that influence the wider sector	□ Trade unions, professional bodies, Health and Safety Executive.
		3.4	Outline different viewpoints around an issue of public concern relevant to the sector or occupation	□ Consider the effect of recent high-profile events on the industry.
		3.5	Describe how issues of public concern have altered public views of the sector or occupation	□ Introduction of legislation and good practice, eg Criminal Record Bureau checks, risk assessment; health and safety legislation, disabilities and effects on building regulations.
4	Know career pathways available within own and related sectors	4.1	Describe occupational opportunities within own sector and related sectors	□ Progression routes within own sector; progression routes within related sectors; importance of continuing professional development.
		4.2	Identify sources of information related to a chosen career pathway	□ Line manager, Sector Skills Councils, Job Centres, relevant websites.
		4.3	Identify next steps in own career pathway	□ Create a development plan; consult related websites.

Information for tutors

Delivery

This unit includes general topics and those that apply specifically to the learner's workplace. Input should be as varied as possible making good use of internet resources and websites, together with group work, individual study and team activities as well as more traditional written tasks. Learners should be encouraged to read around the subject to gain more understanding of the contents of the relevant legislation.

Visiting speakers, who work in various parts of the organisation or who work for associated organisations, would greatly enliven the programme. All study should be related to the workplace.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Naturally occurring evidence should be used where possible. It is likely that learners will undertake an induction process for any work role or work placement. Learners could build a portfolio of evidence or produce a workbook that, as well as showing evidence of achievement, could be used as a point of reference for their future work.

Suggested resources

Textbooks

Mitchell Sack S – *The Employee Rights Handbook* (Warner Books, 2000)
ISBN 978-0446673266

Mitchell Sack S – *The Employee Rights Handbook: Effective Legal Strategies to Protect Your Job from Interview to Pink Slip* (Legal Strategies Inc, 2010)
ISBN 978-0963630674

Unit 4: Understanding the Use of Email in Business to Business Communication

Unit reference number:	**Y/505/3435**
Level:	**2**
Credit value:	**2**
Guided learning hours:	**14**

Unit aim

The purpose of this unit is to provide learners with knowledge and understanding of the importance of email and how it can be used to increase sales within trade businesses. It covers how email can be used as a tool to generate customer leads as well as communicate with existing customers.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand how email is used to generate business in a business to business environment	1.1	Describe potential benefits of communicating a trade event to a distribution list	◻ Direct to customer, no 'lost in post', can target specific customer type (established, new business, lapsed) by use of distribution lists, no 'gate-keeper'. ◻ Easier to evaluate impact comparing sent mail targets to increased sales on product. ◻ Target trade business events to wide spectrum of businesses. ◻ Easier to add and remove customer information from distribution lists. ◻ Easy to send promotional flyers. ◻ Quick and time effective using draft documents. Information can be re-sent quickly. Guaranteed a quick turnaround on quotes and proposals.
		1.2	Explain the advantages and disadvantages of emailing account information to customers in comparison to other methods	◻ Advantages: an efficient communication method for updating account status information to new and existing customers, interactive so that people can respond, bespoke to the trade business, quick and cheap. ◻ Disadvantages: poorly maintained distribution list, information sent to wrong customer target, impersonal, unemotional, can't respond to questions, easy way out, takes the place of face-to-face or voice-to-voice customer interaction, detached, misinformation circulated, over-used, less brand control, increases the risk that the trade business may stop talking to customers, anonymous to the trade business and recipient if not signed by sender.

2	Know how to create and distribute emails	2.1	Describe the different purposes for sending internal customer emails	☐ Communication, information, clarification, launch of new products, marketing and sales, policies and procedures.
		2.2	Describe the different purposes for sending external customer emails	☐ Marketing and sales, promotions, launch of new products, product recall, networking, compliance.
		2.3	Describe the content and structure required for different types of email	☐ Formal emails that incorporate organisational policy. ☐ Informal emails that incorporate organisational policy.
		2.4	Describe the importance of using in-house style(s) for sending emails	☐ In-house templates, corporate culture, branding.
		2.5	Identify the most effective processes for emailing different types of information to customers	☐ Creation of contacts listings. ☐ Attachments. ☐ Read and receipt requests. ☐ Group emails. ☐ Address book.
		2.6	Describe the company guidelines for the use of email systems	☐ Organisation’s policies that take account of: • Data Protection Act (1998), Freedom of Information Act (2000) • organisation’s communication policy • disclosure of sensitive information.

3	Understand the potential impact of poor email communication on business	3.1	Describe the potential results of inefficient use of email communication on business	◻ Customers receive literature irrelevant to their business. ◻ Missed appointments. ◻ Trade-day events under-attended.
		3.2	Describe the potential results of incorrect use of email communication on business	◻ Impact (loss of business, infringement of Data Protection Act (1998); impact of the Freedom of Information Act (2000), impact of social networks, loss of reputation/customer loyalty). ◻ Incorrect account status information to customer. ◻ Mail-shots targeted incorrectly, customers receive incorrect trade promotions, aggravated customers, loss of customer accounts, loss of new business through misinformation, proposals and/or quotations sent to the wrong customer.

Information for tutors

Delivery

All the learning outcomes can be delivered flexibly. Learners will be introduced to email, how it works and what their role is in a team approach to secure consistent use of company policy.

Formal training sessions should include input from the trainer/assessor to identify the theoretical material and standard information, but learners can work individually or in a group researching and gathering information about the use of email and associated policies provided by the company. Researching the company's policies and practices regarding email, observation of use of emails in the company, and discussions on the effective use of email all offer interactive approaches to learning about the role email plays in developing customer service, improving communications and generating sales. Learners will be expected to have some knowledge of the legislative requirements in respect of the use of email, and the limitations and potential negative impact it can have on a trade business organisation.

Discussions, role play and other active training techniques provide motivational and interactive activities. By shadowing experienced members of the customer service team, learners will be able to see how to communicate with customers using email to build a rapport, and sell products and services using company guidelines.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Suggested resources

Textbooks

Allman E et al – *BTEC First in Information and Creative Technology Student Book* (Pearson, 2013) ISBN 9781446901878

Brown M and Sharpe K – *BTEC Entry 3/Level 1 IT Users Student Book* (Pearson, 2010) ISBN 9781846909238

Fox S – *Business Etiquette for Dummies* (John Wiley & Sons, 2008) ISBN 9780470147092

Websites

www.e-skills.com – e-skills UK

Other

NVQ Levels 1 and 2 IT Practitioners and NVQ Level 3 IT Professionals CD ROM – Pearson

Unit 5: Understanding How to Manage Stock for Customer Orders in Business to Business Services

Unit reference number:	**D/505/3436**
Level:	**2**
Credit value:	**2**
Guided learning hours:	**14**

Unit aim

The purpose of this unit is to provide learners with the knowledge and understanding of stock control processes and procedures in relation to customer orders within trade business services. It includes the typical trading format of trade business services. The stock control process is typically undertaken by warehouse support staff working within these depots, following company procedures. This unit also covers the necessary reporting and recording procedures.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know how to order stock for business to business customers	1.1	Describe the procedure for ordering stock for business to business customers	◻ Correct use of EPOS system (Electronic Point of Sale). ◻ Supplier lead times. ◻ Supply chain view of stock requirement criteria. ◻ Customer required date in conjunction with local stock availability.
2	Know the allocation and transfer of stock in a business to business environment	2.1	Describe how stock is allocated once it has arrived	◻ Goods-inwards policy.
		2.2	Explain the impact of allocation on stock holding	◻ Cost of stock, space utilisation.
		2.3	Explain how to book and receive stock transfers to and from company storage facilities	◻ Booking and receipt of purchase orders. ◻ Correction of delivery errors. ◻ Booking and receipt of inter-branch transfers. ◻ Booking and receipt of customer returns and exchanges.
		2.4	Explain the line check process	◻ Stock taking and ordering additional stock to meet anticipated and actual customer demand.

3	Understand the maintenance of stock records in a business to business environment	3.1	Describe how to update stock records	◻ Stock audit preparation. ◻ Stock file checks and amendments using EPOS system. ◻ Isolation and disposal of damaged/discontinued product. ◻ Product grouping. ◻ Stock rotation.
		3.2	Explain the importance of maintaining up-to-date stock records	◻ Accurate picking and assembly of customer orders.

Information for tutors

Delivery

All the outcomes lend themselves to flexible delivery. Formal training sessions should have input from the trainer/assessor to identify the theoretical material and standard information, but learners can work individually or in a group researching and gathering information about the customer service approaches and policies provided by the company. Researching the company's policies and practices regarding stock control, observation of stock taking, and discussions all offer interactive approaches to learning about managing stock for customer orders. Learners will be expected to have some knowledge of picking, packing, use of EPOS systems and stock rotation.

Learners will be introduced to stock control, how it works, what their role is the management of stock, and the importance of accuracy in the picking of customer orders to ensure consistently high levels of customer service within the organisational culture and approach adopted by the company.

Discussions, role plays and other active training techniques provide motivational and interactive activities. By shadowing experienced members of the warehouse team, learners will be able to see how to communicate with customers, build rapport and accurately pick products using the organisational guidelines.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Suggested resource

Textbooks

Mulcahy D E – *Warehouse Distribution and Operations Handbook* (McGraw-Hill Education, 1993) ISBN 9780070440029

Websites

www.cism-ng.org – Certified Institute of Warehousing & Materials Management

Unit 6: Understanding Sales Function for Business to Business Services

Unit reference number: **H/505/3437**

Level: **2**

Credit value: **3**

Guided learning hours: **24**

Unit aim

The purpose of this unit is to provide learners with the knowledge and understanding of the various sales and customer accounts processes used in a trade business environment. It covers production of quotes, sales orders, refunds and paperwork used.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know how to process business to business sales orders	1.1	Describe the procedure for producing quotes	◻ Organisation's approach. ◻ Written and verbal quotations. ◻ Check understanding with the customer. ◻ Note any time limit.
		1.2	Describe the procedure for producing sales orders	◻ Organisation's approach. ◻ Accuracy check with customer. ◻ Costs. ◻ VAT and non VAT. ◻ Delivery date. ◻ Contact details. ◻ Correct description of goods and numbers.
		1.3	Describe the process for refunds	◻ Organisation's approach. ◻ Written receipt. ◻ Reasons for refund. ◻ Payment method and recording.

2	Know how to maintain the balance of the tills	2.1	Describe how to process cash adjustments	□ Organisation’s approach. □ Overcharging. □ Refunds.
		2.2	Describe procedures for moving cash between tills, checking, clearing and closing tills	□ Organisation’s approach. □ Overcharging. □ Refunds. □ End-of-day balance. □ Transfer of cash to bank.
3	Know how to manage business to business accounts	3.1	Describe how to process account payments	□ Organisation’s approach. □ Recording. □ Counter signatures.
		3.2	Describe how to process trade service expense payments	□ Eligible evidence of spends. □ Organisation’s expenses policy. □ Counter signature. □ Payment method and payment date.
		3.3	Describe the process for correcting a payment error	□ Organisation’s approach. □ Recording the error. □ Counter signature.

4	Know how to manage business to business customer accounts	4.1	Describe how to open customer accounts	◻ Organisation’s policy. ◻ Eligibility. ◻ Customer details. ◻ Credit limits. ◻ Payment methods and timescales.
		4.2	Describe the importance of monitoring account status and reporting any discrepancies	◻ Organisation’s policy. ◻ Late payment notification. ◻ Bad debts.
		4.3	Describe how to produce a statement of account	◻ Organisation’s policy. ◻ Sales. ◻ Customer details. ◻ VAT.
		4.4	Explain how to produce statement remittances	◻ Organisation’s policy. ◻ Customer details. ◻ Payments made.

Information for tutors

Delivery

All the outcomes lend themselves to flexible delivery. Formal training sessions should have input from the trainer/assessor to describe the legal and fiscal requirements of account management and handling of cash. Learners need to be able to understand how account management supports customer loyalty and a long-term customer relationship.

Learners will be introduced to how account management functions within the organisation in which they work. They will understand how to balance a till and the basic principles of banking money on a daily basis.

Discussions, role plays and other active training techniques provide motivational and interactive activities. By shadowing experienced members of the team, learners will be able to see how to manage accounts, build rapport, and sell products and services within legislative and organisational constraints.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Suggested resource

Textbooks

Bird T and Cassell J – *Brilliant Selling: What the Best Salespeople Know, Do and Say* (Pearson Business, 2012) ISBN 9780273771203

BTEC First Business Unit 5 Sales and Personal Selling (Pearson, 2013) ISBN 9781446902059

Websites

www.cim.co.uk – The Chartered Institute of Marketing

http://www.pearsonschoolsandfecolleges.co.uk/FEAndVocational/BusinessandAdministration/BTEC/BTEC-Firsts-Business-2012/ISBN/TeachingAssessmentPacks/BTECFirstBusinessUnit5Salesandpersonalselling.aspx - BTEC First Business Unit 5 Sales and Personal Selling

Unit 7: Understanding the Use of Telephone Communications for Business to Business Services

Unit reference number:	**K/505/3438**
Level:	**2**
Credit value:	**2**
Guided learning hours:	**14**

Unit aim

The purpose of this unit is to provide learners with the knowledge and understanding of the importance of telephone communications for a trade business organisation and the impact they have upon the marketplace.

The unit covers the benefits of effective communications with customers, as well as the conventions and processes for preparing and conducting telephone calls and using SMS text messaging.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the impact of using telephone communications in a business to business environment	1.1	Describe potential effects on business of poor telephone communication techniques	◻ Loss of customer. ◻ Sales and profits decrease. ◻ Reputation in market.
		1.2	Describe the advantages of using the telephone with customers	◻ Objections dealt with immediately. ◻ Quicker decisions/responses. ◻ Personal. ◻ Builds relationships, increase in customer loyalty and customer rapport. ◻ Direct. ◻ Increase in sales.

2	Understand how to prepare and conduct telephone calls for business to business services	2.1	Describe desired outcomes of different types of calls	◻ Purpose of call (appointment setting, first contact, promotion of new productions/offers, debt collection, problem solving, feedback, information).
		2.2	Describe the protocol and etiquette for talking to customers on the telephone	◻ Organisational policy. ◻ Smile before you phone. ◻ Preparation for the call. ◻ Use of open and closed questions. ◻ Call closure. ◻ Recording actions and outcomes.
		2.3	Describe the structure and content required for different types of calls	◻ Tone. ◻ Form of address. ◻ Smiling. ◻ Rapport building. ◻ Correct greeting.

3	Understand how questioning skills can be used for telephone communications	3.1	Describe differences between open and closed questions	□ Open, closed, probing, leading, listening, hearing and qualifying.
		3.2	Describe advantages and disadvantages of using leading questions in business to business telephone communications	□ Advantages: • Promotion of a product or service • Demonstrates a knowledge of customer needs • Cross-selling • Optimising the value of the sale. □ Disadvantages: • Putting customer loyalty at risk • Transactional rather than customer relationship building • Customer dissatisfaction • Loss of custom.

4	Understand the benefits of SMS texting in business to business services	4.1	Identify situations where SMS texting is the preferred method of communication for the organisation and customer	▫ To advise new customers of account set-up, remind customers of appointments, follow up leads, advise customers of in-stock orders, arrange deliveries, advise of trade/promotional events, confirm requirements, advise of new/discounted products.
		4.2	Describe business benefits of effective use of SMS text messaging	▫ Quick, direct, time efficient, responsive to business needs, reactive to change, 'finds' customer quickly, can target one or many, easy and quick to change customer details, evaluate against product sales increase, trade account increase, new product sales, inexpensive advertising method.
		4.3	Explain the potential impact of incorrect language, tone and spelling on business	▫ Breach of data protection, annoys customers, wrong information, incorrect customer targeted, loss of trading accounts, miss out on new business, loss of leads, missed appointments, poor attendance at trade events, unproductive representative appointments.

Information for tutors

Delivery

All the outcomes lend themselves to flexible delivery. Formal training sessions should have input from the trainer/assessor to identify the theoretical material and standard information, but learners can work individually or in a group researching and gathering information about the customer service approaches and policies provided by the company. Researching the company's policies and practices regarding use of the telephone and text, observation of customer service interactions by telephone and text, and discussions all offer interactive approaches to learning about the products and services. Learners will be expected to have some knowledge of the benefits and disadvantages of using telephone and text.

Learners will be introduced to how the telephone and text can improve business communications, grow new business and retain client contact while retaining consistently high levels of customer service within the organisational culture and approach adopted by the company.

Discussions, role plays and other active training techniques provide motivational and interactive activities. By shadowing experienced members of the customer service team, learners will be able to see how to communicate with customers, build rapport, and sell products and services within legislative and organisational constraints.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Suggested resource

Textbooks

BTEC Apprenticeship Business & Administration Delivery Guide (Pearson)
ISBN 9781446900215, qualifications.pearson.com

Carysforth C et al – *BTEC First Business Student Book* (Pearson, 2013)
ISBN 9781446901366

Fox S – *Business Etiquette for Dummies* (John Wiley & Sons, 2008)
ISBN 9780470147092

Websites

www.skillscfa.org – Skills CFA

Unit 8: Understanding the Use of IT Software for Targeting Customers in Business to Business Services

Unit reference number:	**M/505/3439**
Level:	**2**
Credit value:	**2**
Guided learning hours:	**14**

Unit aim

The purpose of this unit is to give learners knowledge and understanding of how IT can be used to generate and increase revenue within a trade business.

The unit specifically covers how e-shots and databases are utilised in order to target new and existing clients for increased sales activities as well as monitoring business performance.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand the business benefits of using IT to target customers in a business to business environment	1.1	Describe the business benefits of using IT to target customers	◻ Speed of contact, targeting and market segmentation, follow-ups, launch of new products, right first time in communication of information, after-sales service, building customer relationships, up-selling and promotional event communication.
2	Understand how to design and use effective e-shots to increase sales in a business to business environment	2.1	Describe the purpose of e-shots	◻ Promotional activity to existing customers and new customers. ◻ Brand awareness. ◻ Customer communication. ◻ Competitor advantage. ◻ Speed of communicating potential sales to a large audience.
		2.2	Describe what makes an effective e-shot	◻ Clear communication, visuals, follow-up activity, knowledge of customer base.
		2.3	Describe the organisation's guidelines for compiling e-shots	◻ Organisation's policy for creation and use of e-shots.
		2.4	Describe the systems for managing customer responses	◻ Development, updating and cleansing of CRM systems. ◻ Follow up communications and recording of actions.
		2.5	Describe the impact of e-shots on sales and revenue generation	◻ Advantages of its use, costs, increased customer base. ◻ Organisation's planned and actual sales and revenue targets.

3	Understand how customer databases are used to increase sales and monitor business performance in a business to business environment	3.1	Identify employer requirements for compliance with current data protection legislation	▫ Data Protection Act. ▫ Organisational policy.
		3.2	Identify employee requirements for compliance with current data protection legislation	▫ The organisation's policy. ▫ Non-disclosure of sensitive client information. ▫ Non-disclosure of confidential information.
		3.3	Describe the impact customer databases can have on trade businesses	▫ Application of the principles of database development, impact of the Data Protection Act and Freedom of Information Act, report writing, updating entries and trend analysis.
		3.4	Describe the importance of maintaining up-to-date customer databases	▫ Targeted promotion, knowing your customer base, product development, branding, follow-up/after-sales service, growing customer loyalty.
		3.5	Describe how customer databases can be used to increase sales	▫ Targeted marketing, customer segmentation, promotions and research for future product development.
		3.6	Describe the importance of monitoring business performance	▫ Meeting annual targets, business continuity and business growth, competitor advantage.
		3.7	Describe how business performance can be monitored	▫ Business reporting, market share, competitor analysis.

Information for tutors

Delivery

All the outcomes lend themselves to flexible delivery. Formal training sessions should have input from the trainer/assessor to identify the theoretical material and standard information, but learners can work individually or in a group researching and gathering information about the impact of IT on growing customer relationships. Researching the company's IT policies and practices regarding use of IT as a targeting tool, observation of targeted interactions using IT, and discussions all offer interactive approaches to learning about the products and services. Learners will be expected to have some knowledge of the legislative requirements in respect of data protection and freedom of information and should be able to describe how to set up and use a database to grow customer relationships.

Learners will be introduced to database management, how it works and what its role is in growing customer relationships within the organisational culture and approach adopted by the company.

Discussions, role plays and other active training techniques provide motivational and interactive activities. By shadowing experienced members of the team, learners will be able to see how to communicate with customers using IT, build rapport, and sell products and services within legislative and organisational constraints.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Suggested resource

Textbooks

Fox S – *Business Etiquette for Dummies* (John Wiley & Sons, 2008) ISBN 9780470147092

Heathcote F R – *Right from the Start Access 2007* (Payne-Gallway Publishers Limited, 2007) ISBN 9781905292363

Heathcote F R – *Right from the Start Excel 2007* (Payne-Gallway Publishers Limited, 2007) ISBN 9781905292370

Richards R P – *Word 2002 Right from the Start* (Payne-Gallway Publishers Limited, 2002) ISBN 9781903112779

Websites

www.e-skills.com – e-skills UK

Unit 9: Sales Operations

Unit reference number: **H/505/3440**

Level: **2**

Credit value: **3**

Guided learning hours: **20**

Unit aim

This unit provides the learner with the understanding and skills they need to ensure product knowledge that enables them to sell products effectively and provide good customer service. This includes knowing the company's structure and mission, knowing that work has to be carried out safely, having knowledge of the products and services offered by the company, and understanding what customers require.

So that they are able to highlight the advantages of their company's products and services. learners need to know how the products and services differ from those on offer from competitor companies.

Learners need to establish customer requirements. By understanding the company's products and services and what else is available in the marketplace, learners can then target customers and offer them suitable products and services from the company's range. It is important to match product and service features to customers' needs, sales staff have to communicate the benefits to customers of purchasing the products and services. Learners can target both new and existing customers with the possibility of repeat sales opportunities. As well as knowing what customers require, staff must have a positive approach when dealing with them as this will contribute towards ensuring that the company's purposes are met.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Know the characteristics of products	1.1	Describe the products and services provided by the organisation	□ Stock levels. □ Product types.
		1.2	Outline the features of products and services provided by the organisation	□ Style, finish, colour, product specifications.
		1.3	Identify similar products offered by competitors	□ Knowledge of competitors and the importance of maintaining competitor advantage.
		1.4	Identify the benefits of the products and services provided by the organisation in comparison to competitor offerings	□ Cost, availability. □ Quality standards; design services; safety standards.

2	Know the responsibilities and procedures associated with sales representatives	2.1	Identify sales representatives' responsibilities	◻ Build customer relationships; prospecting for new customers; sources of new customer information (estate agents, internet, newspapers, referrals, competitor sites, informal contacts, company database); following up on leads; troubleshooting; selling products and services; product knowledge (features, benefits); sources of product information; implications of inadequate knowledge.
		2.2	Describe how to work safely when selling	◻ Employer duty of care; own responsibilities; personal protective equipment; responsibilities; entering a site; site reporting; carrying stock in vehicles; handling products.
		2.3	Explain how to use the organisation's databases	◻ Customers; products; making enquiries (logging on, user names, passwords, using the enquiry screens); setting up accounts; type of customer, customer details required; suppliers; supplier patterns; supplier numbers; sales reports; call logs; expenses claiming.
3	Know how to provide customers with appropriate products	3.1	Explain the different approaches needed for different types of customer	◻ Equality and diversity, new and existing customers, identification of potential customers in respect of different products. ◻ Different types of communication, language and promotional activity.
		3.2	Explain how to establish customers' needs	◻ Type of customer (client, repeat, one-time, prospective). ◻ Anticipating customer queries.
		3.3	Describe methods of dealing with customer queries and complaints	◻ Organisational policy. ◻ Informal approaches. ◻ Formal approaches. ◻ Feedback and agreed actions.

Information for tutors

Delivery

All the learning outcomes can be delivered flexibly. Formal training sessions have input from the trainer/assessor to identify the theoretical material and standard information, but learners can work individually and in a group researching and gathering information about matters related to the products and services provided by the company. Researching products and services, practical work, case studies, business simulations, in-tray exercises and discussions all offer interactive approaches to learning about the products and services. Learners will be expected to have some knowledge of their own company, other companies and the industry.

Learners will be introduced to the range of products and services together with details of their features and the benefits they provide to customers. Consideration is then given to responsibilities of sales representatives and their role in the company in ensuring the company's purposes are met. Finally, learners will be introduced to customer service and its importance in sales if selling is to be successful.

Discussions, role play and other active training techniques provide motivational and interactive activities. The use of new technologies, especially the company's own systems, will be similarly engaging as well as providing additional practical expertise in their use when identifying products, services and customers. By shadowing experienced sales representatives or sales managers, learners will be able to see how customers are targeted for specific products and services and how staff convey product and service information in a sales environment by tailoring it to the customers' needs and how they win business.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Suggested resources

Textbooks

Bird T and Cassell J – *Brilliant Selling: What the Best Salespeople Know, Do and Say* (Pearson Business, 2012) ISBN 9780273771203

Bradley S – *NVQ/SVQ Level 2 Customer Service Candidate Handbook* (Heinemann Workbased Learning, 2011) ISBN 9780435046897

Websites

www.cim.co.uk – The Chartered Institute of Marketing

Other

BTEC Apprenticeship Customer Service Delivery Guide, ISBN 9781446900222, download from qualifications.pearson.com or order from the resources section of the Pearson website

Unit 10: Understanding How to Use Computer Aided Design Software

Unit reference number:	**K/505/3441**
Level:	**2**
Credit value:	**3**
Guided learning hours:	**30**

Unit aim

This unit provides the learner with the understanding and skills they need to be able to use computer aided design (CAD) software to produce kitchen designs that meet customer requirements.

Design staff need to be proficient in a range of areas. They need to identify customers' requirements by eliciting customers' needs and as work will involve site visits, learners need to work safely. They need to be able to measure accurately so that the measurements can be incorporated into the designs.

Work requires discussion with clients, so learners will need to use customer service skills in their dealings with clients to ensure that they win the business and that value-added products can be sold. Knowledge of the organisation's range of products will allow the designer to match the products to customer requirements.

The designer needs to be able to use the CAD software to realise the customer's design. There are also design requirements specific to kitchens, such as safety and access requirements, and knowledge of ergonomics. Some CAD is specific to building and kitchen design and offers an array of customised tools that speeds the design work by automating some of it. The CAD software allows the alternative designs that can be developed and discussed with clients to ensure optimal solutions that meet client needs.

By fulfilling a customer's design requirements, the company will gain business and ensure that further business is generated through recommendation and that the company's purposes are met.

Essential resources

For this unit, centres need to ensure that appropriate computer aided design software is available.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

1	Understand how to establish a customer's requirements	1.1	Describe the products and services provided by the organisation	◻ Rooms, appliances, flooring, sinks and sanitary ware, doors and joinery, features (style, finish, colour, product specifications). ◻ Benefits (cost, availability). ◻ Quality standards; design services; company design standards; safety standards. ◻ Sources of product knowledge. ◻ Comparison with competitor products.
		1.2	Describe how to establish the customer's design requirements	◻ Discussion with customer: customer requirements (cabinets, appliances, worktops, sinks, taps, flooring, surface equipment; lighting, ventilation; extraction, special requirements); room shape; obstructions; style; atmosphere; look; lifestyle needs; materials; finishes; budget; layout.
2	Understand how to use computer aided design software	2.1	Identify the function of computer aided design software tools	◻ CAD software for room design: opening the application; creating a file; opening existing files; saving files; exiting the application; title bar; menu bar; window control; mode selection; mode palette; toolbar; buttons and their functions; auto features; filters; cursor control.
		2.2	Describe how to use computer aided design software tools to lay out a design	◻ Design: walls; angled walls; layout; floors; stepped floors; ceilings; ceiling wedges; angled ceilings; doors; windows (standard, Velux, dormer); niches; alcoves; units; fillers; plinths; cornices; panels; worktops; floor coverings; wall coverings; lighting (auto, manual, group, task); shelving; openings; closures; islands; corner solutions; push to corner; appliances; cubic capacity; elevations; plans; perspectives; multi-views, dimensioning; annotation; duplication.

3	Understand how to design	3.1	Describe how to interpret a customer’s design specification	◻ Organisational approach to meeting customer requests through use of computer aided design. ◻ Taking an idea and producing a design plan.
		3.2	Describe how to measure a site for installation	◻ Room layouts (straight, galley, L-shaped, U-shaped, island); collision areas; entries; exits; walkways; working sequences; dimension requirements (safety, apertures, doors). ◻ Legal and regulatory requirements; units; corner posts; pipe work; electrical installation; safety margins; access; budget constraints.
		3.3	Explain how to produce a design that meets a customer’s requirements	◻ Understanding customer needs, checking at each stage that the design meets the customer’s requirements, use of appropriate language in questioning and checking. ◻ Communicate to the customer how the design meets their request.

Information for tutors

Delivery

All the learning outcomes can be delivered flexibly. Formal training sessions should have input from the trainer to identify some of the theoretical material and standard information relating to design, as well as describing how the software works. Learners can work individually and in a group researching and gathering information about matters related to the products and services provided by the company when carrying out design work for customers. Researching products and services, practical work, case studies, business simulations, in-tray exercises and discussions all offer interactive approaches to learning about kitchen design. Up-to-date materials are available about the company's products and services and it is normally possible to identify what similar products and services are available from competitor organisations as well as developments in kitchen design that reflect current customer demands. Learners will be expected to have some knowledge of their own company and of the kitchen design industry.

Learners will be introduced to kitchen design by identifying how to establish customer requirements and the nature of the work to be done. Consideration is then given to how to use the CAD software by identifying what it offers and how it is used. Finally, learners will be required to design a kitchen that meets a customer's design specification.

Discussions, simulations, practical work and other active training techniques provide motivational and interactive activities. The use of computers and software tools on the company's own system will provide the necessary practical expertise in their use when designing kitchens.

Assessment

The centre will devise and mark the assessment for this unit.

Learners must meet all assessment criteria to pass the unit.

Suggested resources

Textbooks

Byrnes D – *AutoCAD 2013 for Dummies* (John Wiley & Sons, 2012)
ISBN 978-1118281123

Parsons A, Wise J and MacLellan T – *BTEC Level 2 First Art and Design Student Book* (Pearson, 2010) ISBN 9781846906121

Tooley R and O'Dwyer N – *Edexcel Diploma: Engineering: Level 2 Higher Diploma ADR with CDROM* (Pearson, 2008) ISBN 9780435756215

13 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *BTEC UK Quality Assurance Centre Handbook*

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are also available on our website.

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please visit our website.

Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources and, if they are successful, we will list their BTEC resources on our website.

14 Professional development and training

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- building your team and teamwork skills
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- Ask the Expert: submit your question online to our Ask the Expert online service and we will make sure your query is handled by a subject specialist.
- Please visit our website at qualifications.pearson.com/en/support/contact-us.html

Annexe A

Mapping with National Occupational Standards

The grid below maps the knowledge covered in the Pearson BTEC Level 2 Specialist qualification in Principles of Trade Business Services against the underpinning knowledge of the National Occupational Standards in Retail, IT and Customer Service. Centres can use this mapping when planning holistic delivery and assessment activities.

KEY

# indicates partial coverage of knowledge in the NOS unit

A blank space indicates no coverage of the knowledge

1	CFACSD1 Develop Customer Relationships	#									
2	PROHSK1 Basic Hazard Awareness		#								
3	ESKIEML2 Using Email				#						
4	SSR.B412 Manage the Supply of Stock for Sale					#					
5	SSR.C218 Reconcile Retail Customer Accounts						#				
6	SSR.C217 Process Payments Made to Retail Customer Accounts						#				
7	CFABAA621 Make and Receive Telephone Calls							#			
8	SLS57 Communicate Using Multiple Digital Marketing/Sales Channels							#	#		

9	SSR.C205 Help Customers Choose Products in a Retail Store									#	
10	CCSDES23 Create 2D Designs Using a Computer Aided Design System										#

Annexe B

Unit mapping overview

The table below shows the relationship between the new qualification in this specification and the predecessor qualifications: Pearson BTEC Level 2 Award in Trade Business Services (last registration 31/08/2013).

X				
	F			
		F		
			F	
				F

KEY

P – Partial mapping (some topics from the old unit appear in the new unit)

F – Full mapping (topics in old unit match new unit exactly or almost exactly)

X – Full mapping + new (all the topics from the old unit appear in the new unit, but new unit also contains new topic(s))

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