



LCCI
International
Qualifications

L3

Pearson LCCI Level 3 Certificate in Sales and Account Management (ASE20203)

SPECIFICATION

First teaching from January 2019

Edexcel, BTEC and LCCI qualifications

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Acknowledgements

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Introduction

LCCI qualifications

LCCI qualifications are widely regarded by employers as preparing students for the key functions of modern international business. Employers, universities and professional bodies across the world recognise them.

This new and engaging range of qualifications has been developed in collaboration with professional bodies, employers and customers. To ensure that the qualifications develop the breadth and depth of knowledge, skills and understanding that students need to be effective employees and that they support progression pathways, we have carried out in-depth, independent consultation.

LCCI offers a wide range of qualifications which are available at Levels 1 to 4 across the following subject areas:

- Business
- English Language
- Financial and Quantitative
- Marketing.

This specification is part of the Marketing suite of LCCI qualifications.

This qualification replaces the Pearson LCCI Level 3 Certificate in Selling and Sales Management (ASE3030).

Purpose of the specification

This specification sets out:

- the objectives of the qualification
- any other qualification(s) that a student must have completed before taking the qualification
- any prior knowledge and skills that the student is required to have before taking the qualification
- any other requirements that a student must have satisfied before they will be assessed or before the qualification will be awarded
- the knowledge, understanding and skills that will be assessed as part of the qualification
- the method of assessment and any associated requirements relating to it
- the criteria against which a student's level of attainment will be measured.

Rationale

The Pearson LCCI Level 3 Certificate in Sales and Account Management meets the following purposes:

- to develop students' knowledge and understanding of sales, including the aims and objectives of sales in an organisation and how to manage the sales process
- to develop students' knowledge and understanding of account management and the importance of customer behaviour
- to develop sound understanding of how sales and account management interrelates with the other business functions of an organisation
- to give students the sales skills they need to work in sales and the ability to apply these skills in real-life scenarios.

Qualification aim

This qualification replaces the Pearson LCCI Level 3 Certificate in Selling and Sales Management. It has been designed to help students progress in their careers.

The purpose of the qualification is to allow students to develop the skills and understanding of sales and account management and to apply this knowledge to start or advance their careers. The qualification is particularly suitable for students who are already employed in sales and who would like to progress their career to the next level, such as working with accounts or in middle management. The qualification is suitable for students in other business-related fields, such as marketing or finance, who need to have sales knowledge as part of their existing role and for students who would like to make a career change to sales.

This qualification gives students the understanding and skills they need to work in a sales environment. It introduces them to the basics of selling, the sales environment, planning and measuring sales, and account management.

Students will benefit from the qualification's focus on personal selling, account management and modern technology. They will acquire a sound knowledge of sales and will be introduced to relationship selling, account management and customer relationship management. This knowledge can gain them entry to sales and can help to progress their career to account management and sales management.

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Specification at a glance

The Pearson LCCI Level 3 Certificate in Sales and Account Management (ASE20203) consists of one externally-examined paper.

| Title: Pearson LCCI Level 3 Certificate in Sales and Account Management | |
|--|---------------------------------|
| <ul style="list-style-type: none">Externally assessed | 100% of the total qualification |
| Overview of content | |
| <ul style="list-style-type: none">Sales fundamentalsThe stages of the personal selling processInformation needed to prepare a sales planSales planning and measuring performanceAccount management | |
| Overview of assessment | |
| <ul style="list-style-type: none">One written, externally-set and marked paper, contributing 100% of the overall grade of the qualification.The examination will be 3 hours.The examination will consist of 100 marks.Students should answer all questions.Questions comprise of multi-choice, short-response questions and extended open-response.Students will be graded Pass/Merit/Distinction. A result of Fail will be recorded where students do not achieve the required marks for a Pass. | |

Knowledge, skills and understanding

Content

To prepare students for the final assessment of this qualification, the following content must be covered.

1. Sales fundamentals

| Subject content | What students need to learn |
|---|---|
| 1.1 The link between marketing mix, product life cycle and sales | <p>Understand the marketing mix and its relationship with the product life cycle and sales, and how the marketing mix is adapted at different stages in the product life cycle.</p> <ul style="list-style-type: none">• The stages in the product life cycle:<ul style="list-style-type: none">○ introduction (including development)○ growth○ maturity○ decline. <p>The marketing mix (4Ps)</p> <ul style="list-style-type: none">• Product – the difference between goods and services and how the sales process is adapted depending on the product (goods or services):<ul style="list-style-type: none">○ goods○ services○ unique selling points (USP) of goods and services.• Pricing – changes to the pricing strategies at different stages of the product life cycle to promote sales:<ul style="list-style-type: none">○ cost-plus○ skimming○ premium○ penetration○ competitor based. |

| Subject content | What students need to learn |
|--|--|
| | <ul style="list-style-type: none"> • Place – how place impacts on where and how you sell your products: <ul style="list-style-type: none"> ○ retail ○ wholesale ○ online ○ mail order/catalogue ○ personal selling. • Promotional mix – the different ways of promoting a product at various stages of the product life cycle: <ul style="list-style-type: none"> ○ advertising ○ sales promotion ○ social media ○ public relations ○ direct marketing ○ merchandising. |
| <p>1.2 Types of sales techniques/ opportunities</p> | <p>Understand the features of different types of sales techniques/opportunities and how they are used in different situations to maximise sales revenue.</p> <ul style="list-style-type: none"> • Transactional selling. • Relationship selling. • Cross-selling. • Add-on selling. • Repeat sales. • Upselling. |

| Subject content | What students need to learn |
|---|---|
| <p>1.3 The customer's buying process</p> | <p>Understand the buying process and the stages that the customer goes through, including the Attention-Interest-Desire-Action (AIDA) model of engagement.</p> <ul style="list-style-type: none"> • The buying process: <ul style="list-style-type: none"> ○ problem/need recognition ○ information search ○ evaluation of alternatives ○ purchase decision ○ purchase ○ post-purchase evaluation. • The AIDA model of engagement: <ul style="list-style-type: none"> ○ attention – how customers/consumers are made aware of an organisation, service, product or brand ○ interest – how customers/consumers become interested in an organisation, service, product or brand ○ desire – how tactics can influence customer preference towards an organisation, product or brand ○ action – how communications influence a specific action. |
| <p>1.4 Sales activities</p> | <p>Understand sales activities and their importance to a business:</p> <ul style="list-style-type: none"> • gathering information on new and existing customer needs • customer prospecting and development • selling and negotiation • taking orders from customers • sales reporting to colleagues • account management. • after-sales support • sales forecasting and budgeting. |

| Subject content | What students need to learn |
|---|---|
| <p>1.5 Legal and ethical selling</p> | <p>Understand the legal and ethical requirements involved when selling a product, how the attitude and behaviour of the salesperson can influence the reputation of a business, and the implication of not adhering to these requirements.</p> <ul style="list-style-type: none"> • Legal and ethical requirements: <ul style="list-style-type: none"> ○ contract laws ○ laws that protect consumers ○ relevant product standards ○ intellectual property laws, (patents, trademarks, copyright) ○ avoiding bribery and price fixing ○ avoiding untruthful or misleading information ○ respecting the privacy of customers and safeguarding their data ○ respecting cultural differences and avoiding discriminatory behaviour. • Legal implications of the selling process: <ul style="list-style-type: none"> ○ consumer protection (products should be safe and fit for purpose, advertising must not be false, providing untruthful or misleading information, interest charges for goods sold on credit must be disclosed, with no hidden fees or charges, rules regarding refunds must be clear) ○ data protection (secure storage, confidentiality, regarding disclosure and access arrangements) ○ implications of breaching statutory legislation for the business (legal action, fines, possible liquidation, bankruptcy, possible imprisonment, loss of customers, loss of reputation) ○ implications of breaching statutory legislation for the salesperson (disciplinary actions/sanctions – monitoring, suspension, loss of job, impact on career opportunities and advancement). |

| Subject content | What students need to learn |
|---|--|
| <p>1.5 Legal and ethical selling (contd)</p> | <ul style="list-style-type: none"> • Behaviour, attitudes and ethical selling: <ul style="list-style-type: none"> ○ positive attributes/characteristics of a salesperson – knowledgeable, honest, responsible, focused, courteous, empathetic, persuasive, reflective ○ selling dilemmas and unethical behaviour – providing untruthful or misleading information, bribery, deception, price fixing. • Benefits of a legal and ethical approach to a business: <ul style="list-style-type: none"> ○ building a reputation for treating customers fairly ○ developing customer loyalty and encouraging repeat sales ○ boosting of revenue and profit margins ○ minimising complaints ○ reducing the risk of legal action ○ gaining competitive advantage. |

| Subject content | What students need to learn |
|--|---|
| <p>1.6 The organisational structure of the sales team</p> | <p>Understand the typical roles and responsibilities in a sales team and the activities that are carried out.</p> <ul style="list-style-type: none"> • Sales director (setting the strategy, compiling the sales plan, responsible for the day-to-day activities of the sales force, interfacing with other departments, management). • Sales manager (managing the sales force, recruiting new staff, setting operational objectives, measuring performance of the sales force, coaching, contributing to the sales tactics). • Office- and field-based salesperson (providing information, interacting with the customer, facilitating the sale, generating income and revenue, contributing to the sales plan): <ul style="list-style-type: none"> ○ key account manager (manages and supports the development of specific, profitable client accounts, contributes to the sales plan) ○ account manager (manages and supports general client accounts, contributes to the sales plan) ○ sales support (order taking, account support, administration, provides management information to the sales team) ○ salesperson. |
| <p>1.7 Payment of sales people</p> | <p>Know the features of the different ways in which salespeople are paid and their impact on both the individual salesperson and the business.</p> <ul style="list-style-type: none"> • Salary. • Commission. • Bonuses. • Wages/overtime. • Profit sharing. |

2. The stages of the personal selling process

| Subject content | What students need to learn |
|---|---|
| <p>2.1 Personal selling process and activities</p> | <p>Understand the different stages of the personal selling process used by a salesperson to engage prospective customers and close a sale, and the activities associated with the personal selling process.</p> <ul style="list-style-type: none"> • Stages of the personal selling process: <ul style="list-style-type: none"> ○ prospecting for customers ○ pre-approach ○ approach ○ presentation and demonstration ○ handling requests for clarification and objections ○ closing the sale ○ follow up. • Personal selling activities used during the personal selling process: <ul style="list-style-type: none"> ○ make direct contact with customers (face-to-face or by telephone) ○ use direct contact to promote and sell goods to customers ○ use direct contact to encourage potential customers to trial products ○ use promotional methods to make a sale. |
| <p>2.2 Prospecting for customers</p> | <p>Understand the methods of identifying prospective customers and the appropriateness of each method.</p> <ul style="list-style-type: none"> • Cold-calling. • Referrals. • Personal observations for identifying new clients. • Direct mail or telephone. |

| Subject content | What students need to learn |
|-------------------------|--|
| 2.3 Pre-approach | <p>Understand that sales people will seek information about a potential customer before making contact.</p> <ul style="list-style-type: none"> • Key customer information to be sought: <ul style="list-style-type: none"> ○ needs ○ preferences ○ habits ○ situation ○ economic and social status of the customer. • Use of appropriate behaviours and attributes. |
| 2.4 Approach | <p>Understand how to meet and greet the customer to get their attention and persuade them to buy.</p> <ul style="list-style-type: none"> • Customer contact: <ul style="list-style-type: none"> ○ making appointments ○ timing contact to fit the customer's needs and schedule. • Managing cancelled appointments: <ul style="list-style-type: none"> ○ rescheduling ○ dealing with negative customer response. |

| Subject content | What students need to learn |
|--|---|
| <p>2.5 Presentation and demonstration</p> | <p>Understand why a salesperson may present and/or demonstrate a product and what needs to be done to gain sales commitment after the presentation and/or demonstration.</p> <ul style="list-style-type: none"> • Reasons for presentation and demonstration: <ul style="list-style-type: none"> ○ to show the special features and benefits of the product ○ to give the customer opportunities to raise questions ○ to emphasise how the product meets the specific needs of the customer. • How to gain sales commitment after a presentation/demonstration: <ul style="list-style-type: none"> ○ recording consumer interest ○ distribution of business cards ○ completing order forms ○ creating follow-up lists. |

| Subject content | What students need to learn |
|--|---|
| <p>2.6 Handling requests for clarification and objections</p> | <p>Understand the points of clarification that may be raised by a customer during the sales process and how to deal with customer objections before negotiating the closing of a sale.</p> <ul style="list-style-type: none"> • Nature of request for clarification: <ul style="list-style-type: none"> ○ service levels to be provided ○ after-sales service ○ delivery time ○ price ○ warranty. • Common objections: <ul style="list-style-type: none"> ○ price ○ understanding value ○ nature of product ○ timing of sales call/visit ○ trust in the company ○ better offer from competitor ○ customer satisfied with current product. • Negotiation – use knowledge of market position to guide negotiation: <ul style="list-style-type: none"> ○ understand objectives of the customer ○ be prepared to compromise on the price and the service component of the sale ○ understand the behaviour of the customer’s decision making unit (DMU) ○ having a thorough knowledge of the product <ul style="list-style-type: none"> – USP – its service component – customer benefits gained – competitive advantage. |

| Subject content | What students need to learn |
|------------------------------------|--|
| <p>2.7 Closing the sale</p> | <p>Understand the techniques to use with individuals when closing a sale.</p> <ul style="list-style-type: none"> • Closing a sale: <ul style="list-style-type: none"> ○ gain buyer’s firm commitment to the purchase ○ agree timing of the sale ○ approval of contracts of sale by both parties ○ agree methods of payment. • Closing techniques: <ul style="list-style-type: none"> ○ direct close ○ silent close ○ alternative close ○ presumptive/assumptive close. |

| Subject content | What students need to learn |
|------------------------------|--|
| <p>2.8 Follow-ups</p> | <p>Understand the importance of following up with the customer after a sale and the sales activities associated with the follow-up stage of the selling process.</p> <ul style="list-style-type: none"> • Follow-ups: <ul style="list-style-type: none"> ○ check that the customer’s needs have been met or if they have changed ○ discuss any problems or issues with products ○ update the customer on new products ○ build opportunities for further types of sales ○ obtain customer referral ○ develop customer loyalty. • After-sales activities: <ul style="list-style-type: none"> ○ recording information <ul style="list-style-type: none"> – sales made – payments – customer information ○ handling complaints ○ feedback from customers ○ personal reflective practice: <ul style="list-style-type: none"> – How well did you perform in your last sale? – Could you have done anything better? – How will you do this next time? |

3. Information needed to prepare a sales plan

| Subject content | What students need to learn |
|--|---|
| <p>3.1 Understand customer groups</p> | <p>Understand the different types of customer group, how they can be classified, their purchasing trigger points and the role of the business customer's decision-making unit.</p> <ul style="list-style-type: none"> • Customer groups: <ul style="list-style-type: none"> ○ individuals ○ business (Business-to-Business (B2B), Business-to-Consumer (B2C)) ○ retail and wholesale. • Classification of customers – existing, returning, high/low value, length of time with the business, disaffected. • A business customer's decision-making unit (DMU) and the roles within it – knowing the customer's decision-making unit and how it affects selling/buying: <ul style="list-style-type: none"> ○ user ○ buyer ○ decision maker ○ initiator ○ influencer ○ gatekeeper. • Consumer-purchasing trigger points: <ul style="list-style-type: none"> ○ desire (needs versus wants) ○ motivation <ul style="list-style-type: none"> – intrinsic motivation (interest and enjoyment of product) – extrinsic motivation (external persuaders, status driven) ○ ability to pay (income level, disposable income, discretionary income) ○ availability and attitude towards credit. |

| Subject content | What students need to learn |
|---|---|
| <p>3.2 Market segmentation and use of market research data</p> | <p>Understand how and why market segmentation and market research data are used to group potential customers and inform and enhance sales planning.</p> <ul style="list-style-type: none"> • Ways of segmenting the market: <ul style="list-style-type: none"> ○ industry/product type ○ geographic region (local, regional, international) ○ characteristics of customer types <ul style="list-style-type: none"> – demographic (age, race, religion, gender, family size, ethnicity, income, education level, socio-economic group) – geographic (location) – psychographic (social class, attitudes, lifestyle and personality characteristics) – behavioural (spending, consumption, usage, loyalty status and desired benefits). • Reasons for segmenting the market: <ul style="list-style-type: none"> ○ to target groups of customers effectively ○ to identify customers whose needs match the business's offers. • Market research data provides information about: <ul style="list-style-type: none"> ○ the size and structure of the market ○ the value of the market ○ market trends. • Competitor analysis (competitors and their market activities, market share, product range, consumer characteristics, strengths and weaknesses). • The use of market research data to make business decisions: <ul style="list-style-type: none"> ○ identification of the target market ○ setting sales targets and projections ○ pricing decisions ○ positioning the business against its competitors ○ allocating resources efficiently. |

| Subject content | What students need to learn |
|---|---|
| <p>3.3 Analysing the sales environment</p> | <p>Understand how a STEEP analysis can be used to identify the factors that may impact on sales activities, planning and the wider business environment.</p> <ul style="list-style-type: none"> • Analysis of the external sales environment (STEEP analysis): <ul style="list-style-type: none"> ○ social – demographic changes, behavioural changes, composition of families ○ technological – changes in technology in the market and sector, own and competitors’ technological capabilities ○ economic – economic growth, inflation, exchange rates ○ environmental – pollution, sustainability, consumer attitudes to environmental issues ○ political – tariffs, tax policy, government stability. • Elements of a SWOT analysis: <ul style="list-style-type: none"> ○ strengths and weaknesses of sproduct and business in comparison to what is being offered by competitors ○ opportunities and threats from within the organisation, from the external environment and from competitors. • Impact of changing external environment on sales activities such as: <ul style="list-style-type: none"> ○ identifying customer needs ○ understanding the market and market trends ○ identifying opportunities for making sales, including how to differentiate from competitors ○ identifying challenges to making sales in different contexts ○ being aware of what competitors are doing and knowing when competitors are too far ahead to compete. |

| Subject content | What students need to learn |
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| <p>3.4 Selling in international markets</p> | <p>Understand the features, advantages and disadvantages of the methods of selling in international markets and the factors that need to be considered when selling internationally.</p> <ul style="list-style-type: none"> • Methods of selling in international markets: <ul style="list-style-type: none"> ○ franchising ○ agents ○ licensing ○ distributors ○ joint venture ○ export houses ○ overseas subsidiaries. • Factors to consider when dealing with international markets: <ul style="list-style-type: none"> ○ potential costs, risk and reward ○ accessibility ○ proximity ○ behavioural and cultural norms, traditions, religions, gender roles ○ political climate ○ economic factors ○ operational considerations. |

4. Sales planning and measuring performance

| Subject content | What students need to learn |
|---------------------------------|--|
| <p>4.1 Sales plans</p> | <p>Understand the purpose of different planning functions and how they influence the content of a sales plan.</p> <ul style="list-style-type: none"> • Planning function: <ul style="list-style-type: none"> ○ strategic planning – business strategy (mission statement, long-term objectives) ○ operational planning – marketing plan as part of the overall business plan ○ tactical planning – sales plan as part of the marketing plan. • The typical elements of a sales plan: <ul style="list-style-type: none"> ○ market research trends ○ objectives ○ organisational structure of the sales force ○ forecasting ○ budgeting ○ timelines ○ control measures (reporting, evaluation, key performance indicators, contingency plans). |
| <p>4.2 Sales targets</p> | <p>Understand how to set SMART sales targets and why these are important.</p> <ul style="list-style-type: none"> • The features of a specific, measurable, achievable, relevant, time-bound (SMART) target. • Why sales targets are important: <ul style="list-style-type: none"> ○ to align with the overall business objectives ○ to help with activity planning ○ to motivate team members ○ to allow performance to be measured. • Set sale targets by value or volume. |

| Subject content | What students need to learn |
|-------------------------------------|--|
| <p>4.3 Sales forecasting</p> | <p>Understand how to identify and interpret trends drawn from market and sales data, and how these trends can influence sales forecasts and plans using different methods of forecasting.</p> <ul style="list-style-type: none"> • Identify and interpret market and sales trends from given data: <ul style="list-style-type: none"> ○ market share ○ sales performance. • Purpose of sales forecasting in influencing the sales plan: <ul style="list-style-type: none"> ○ to set staffing levels ○ to determine the sales budget ○ to inform future sales tactics ○ to identify trends from given data ○ to contribute to target setting. • Methods of forecasting: <ul style="list-style-type: none"> ○ based on opinion (experts, sales force) ○ based on market research ○ based on extrapolation from historical sales data. • Factors affecting sales forecasts and plans: <ul style="list-style-type: none"> ○ growth or decline in the market ○ changes in the external environment ○ planned changes to the product ○ competitor activity ○ level of promotional activity ○ resources available, human and physical. • Actions taken to ensure the success of the sales plan: <ul style="list-style-type: none"> ○ revise the sales plan ○ reallocate existing resources (financial, human and physical) ○ allocate extra resources (financial, human and physical). |

| Subject content | What students need to learn |
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| <p>4.4 Measuring sales performance outcomes</p> | <p>Understand the ways in which sales performance can be measured and interpreted, and the implications for future sales plans.</p> <ul style="list-style-type: none"> • Accounting-based sales measures: <ul style="list-style-type: none"> ○ revenues achieved ○ profit margins ○ variance reporting (actual versus target). • Sales activity measures: <ul style="list-style-type: none"> ○ sales volumes ○ numbers of calls or visits per person ○ numbers of leads generated per person ○ number of sales per person. • Customer relationship measures: <ul style="list-style-type: none"> ○ retention and churn rates ○ customer satisfaction (with product, with the salesperson, with the business). • Implications of sales performance on future sales plans: <ul style="list-style-type: none"> ○ targeting underperformance ○ identifying and promoting best practice in the sales team ○ budget allocations ○ personnel and human resource implications (staffing considerations, training). |

5. Account management

| Subject content | What students need to learn |
|--|---|
| <p>5.1 Features of account management</p> | <p>Understanding the features of account management and its advantages to the business and its customers.</p> <ul style="list-style-type: none"> • Features of account management: <ul style="list-style-type: none"> ○ meets company targets to generate sales for a portfolio of accounts ○ identifies new sales opportunities, upselling and cross-selling within existing accounts ○ manages clients, solves conflicts, gives specific information regarding the daily operations of the company and keeps the customer updated ○ co-ordinates the sales team and staff members in other departments who work on the same account ○ set up budgets with the client and company ○ meets time deadlines for accounts ○ uses time management skills effectively. • Advantages of account management to the business: <ul style="list-style-type: none"> ○ improved profitability ○ improved customer relations ○ improved customer retention ○ enhanced market intelligence, leading to an understanding of new opportunities and opportunities for value creation ○ a good reputation for customer service. • Advantages to the customer of establishing an account: <ul style="list-style-type: none"> ○ convenience of ongoing relationship ○ needs are known and addressed ○ trust ○ speed of issue resolution ○ price, value ○ after-sales service. |

| Subject content | What students need to learn |
|---|--|
| <p>5.2 Key accounts features</p> | <p>Understand how to identify potential key accounts, and the advantages of establishing sellers and customers as key accounts.</p> <ul style="list-style-type: none"> • Key accounts come from a relationship where the seller and the customer are strategically aligned. • Criteria for identifying potential key accounts: <ul style="list-style-type: none"> ○ potential for growth ○ potential for value creation ○ potential for innovation and for creating new opportunities ○ willingness to collaborate ○ compatibility of behaviour ○ alignment of corporate values. • Advantages of key accounts to the seller: <ul style="list-style-type: none"> ○ sales growth – higher transaction volume, value-added sales, new opportunities ○ cost reduction – shorter buying process and decision times as seller develops deeper relationship ○ sustained market share – customer loyalty, retention, competition thwarted. • Advantages of key accounts to the customer: <ul style="list-style-type: none"> ○ enrichment of customer relations ○ customer’s specific needs can be addressed/customised ○ faster customer feedback ○ quicker resolution of customer issues. |

| Subject content | What students need to learn |
|--|--|
| <p>5.3 Customer relationship management (CRM)</p> | <p>Understand the advantages and disadvantages of using customer relationship management (CRM) software for account management.</p> <ul style="list-style-type: none"> • Advantages of CRM to a business: <ul style="list-style-type: none"> ○ gives a clear overview of the customers ○ captures leads/potential customers based on enquiries ○ improves productivity in sales and account planning, market planning and order management for the seller ○ enables better collaboration with customers ○ customer targeting ○ upselling, cross-selling ○ information is held centrally, allowing different parts of the business to input and access information. • Disadvantages: <ul style="list-style-type: none"> ○ reliance on data being correct ○ initial cost of the programme ○ ongoing costs ○ requires maintenance ○ training with running software ○ security ○ ensuring compatibility with existing systems ○ reliance on the programme making decisions. |

| Subject content | What students need to learn |
|--|---|
| <p>5.4 Challenges of account management</p> | <p>Understand the challenges and risks of account management and how they can be addressed.</p> <ul style="list-style-type: none"> • Challenges: <ul style="list-style-type: none"> ○ co-ordinating sales, marketing, customer service, operations and finance activities ○ collaborating with customers and ensuring timely communication of response to opportunities, customer claims and marketing activities ○ changes in customers'/business needs occurring more frequently than anticipated. • Risks: <ul style="list-style-type: none"> ○ overestimating the strength of the customer relationship ○ underestimating the competition ○ personality conflicts between the salesperson and the buyer ○ missing or misreading opportunities ○ poor time management. |

Note: Students must be aware of relevant legislation, regulations and codes of practice but the specific names, dates and sections of these will not be assessed.

Delivery guidance

This qualification is not linked to any specific sector of business or workplace role. Teachers are, therefore, encouraged to use a variety of examples and scenarios drawn from the sale and business environment.

Examinations for this qualification will involve some scenario-based questions. The questions pose a sales and account management situation, and ask candidates to identify concepts, create and proofread copy for a business and analyse data. This is what a candidate is likely to face in any future employment that arises from a facility in this subject.

There will be multiple-choice and short- and long-answer questions on each examination paper, and all should be attempted. While not all topics on the content list will be examined on every examination paper, it is expected that all of the material will be examined at some point in the life of the specification so candidates should be prepared to answer questions on all sections of the content.

Examination for this qualification will use the dollar (\$) as standard currency.

Assessment

Assessment summary

| Pearson LCCI Level 3 Certificate in Sales and Account Management |
|---|
| <p>First teaching: January 2019.</p> <p>First assessment: June 2019.</p> <p>Number of series: 4.</p> <p>Availability: April, June, September and November.</p> |
| <p>Overview of content</p> <ul style="list-style-type: none">• Sales fundamentals.• The stages of the personal selling process.• Information needed to prepare a sales plan.• Sales planning and measuring performance.• Account management. |
| <p>Overview of assessment</p> <ul style="list-style-type: none">• One written externally-set and marked paper, contributing 100% of the overall grade of the qualification.• The examination will be 3 hours.• The examination will consist of 100 marks.• Students answer all questions from all sections.• Questions comprise multiple-choice, short open-response and extended open-response questions.• Students will be graded Pass/Merit/Distinction. A result of Fail will be recorded where students do not achieve the required marks for a Pass. |

Assessment Objectives

| Students must: | | % of qualification |
|-----------------------|---|---------------------------|
| A01 | Memorise Demonstrate knowledge of the principles of sales and account management. | 32 |
| A02 | Demonstrate understanding Demonstrate understanding of the relationships between account management techniques, customers and their experiences. | 44 |
| A03 | Analyse/evaluate information Analyse information or data and evaluate plans and activities in a sales context. | 18 |
| A04 | Make connections Make connections and apply and integrate sales and account management principles and concepts to make supported judgements or to create plans and reports. | 6 |
| Total | | 100 |

There will be a small tolerance applied to these target percentages to ensure that overall assessment difficulty is consistent across each series. The maximum range is +/- 2%.

Performance descriptors

| Grade | Descriptor |
|--------------------|--|
| Pass | <p>Students will have a sound understanding of key terms, processes and methodologies and will be able to recall and apply knowledge in familiar situations.</p> <p>They will be able to select and interpret data and apply knowledge of sales plans and strategies in given situations, making some decisions on valid applications and impact.</p> <p>They will be able to define and communicate key aspects of account management processes, selecting appropriate actions in more simple and familiar contexts.</p> <p>They will be able to produce simple/descriptive reports on the effectiveness of sales and account management activities within familiar contexts.</p> <p>They will be able to relate the use of sales and account management processes and modern products to users and purposes.</p> |
| Distinction | <p>Students will be able to synthesise knowledge of sales methodologies and the processes used to target potential customers, bringing together their understanding of technologies and strategies.</p> <p>They will be able to apply their understanding of account management processes to complex contexts.</p> <p>They will show depth of knowledge and development of understanding of account management processes and technologies in different situations, being able to make effective judgements based on analysis of given information.</p> <p>They will be able to compare techniques, processes, and products, evaluating alternatives against defined criteria.</p> <p>They will be able to produce evaluative reports on the effectiveness of sales activities in familiar and unfamiliar contexts and provide justified recommendations.</p> <p>They will be able to create sales and account management proposals, define objectives and apply knowledge to make informed justifications and conclusions in familiar and unfamiliar contexts.</p> |

Entry and assessment information

Student entry

Details on how to enter candidates for the examination for this qualification can be found at qualifications.pearson.com

The closing date for entries is approximately six weeks before the start of each examination series. Centres should refer to the published examination timetable for examination dates.

Combinations of entry

There are no forbidden combinations of entry for this qualification.

Age

Students must be a minimum of 16 years old to be entered for this qualification.

Resitting the qualification

Candidates can resit the examination for Pearson LCCI Level 3 Certificate in Sales and Account Management (ASE20203). Candidates can be entered immediately for the next series of the next examination for this qualification.

Awarding and reporting

The Pearson LCCI Level 3 Certificate in Sales and Account Management (ASE20203) qualification is graded and certificated on a three-grade scale: Pass/Merit/Distinction.

Access arrangements, reasonable adjustments and special consideration

Access arrangements

Access arrangements are agreed before an assessment. They allow students with special educational needs, disabilities or temporary injuries to:

- access the assessment
- show what they know and can do without changing the demands of the assessment.

The intention behind an access arrangement is to meet the particular needs of an individual disabled student without affecting the integrity of the assessment. Access arrangements are the principal way in which awarding bodies comply with the duty under the Equality Act 2010 to make 'reasonable adjustments'.

Access arrangements should always be processed at the start of the course. Students will then know what is available and have the access arrangement(s) in place for assessment.

Reasonable adjustments

The Equality Act 2010 requires an awarding organisation to make reasonable adjustments where a person with a disability would be at a substantial disadvantage in undertaking an assessment. The awarding organisation is required to take reasonable steps to overcome that disadvantage.

A reasonable adjustment for a particular person may be unique to that individual and therefore might not be in the list of available access arrangements.

Whether an adjustment will be considered reasonable will depend on a number of factors, which will include:

- the needs of the student with the disability
- the effectiveness of the adjustment
- the cost of the adjustment; and
- the likely impact of the adjustment on the student with the disability and on other students.

An adjustment will not be approved if it involves unreasonable costs to the awarding organisation, has untenable timeframes or affects the security or integrity of the assessment. This is because the adjustment is not 'reasonable'.

Special consideration

Special consideration is a post-examination adjustment to a student's mark or grade to reflect temporary injury, illness or other indisposition at the time of the examination/assessment, which has had, or is reasonably likely to have had, a material effect on a candidate's ability to take an assessment or demonstrate their level of attainment in an assessment.

Further information

Please see our website for further information about how to apply for access arrangements and special consideration.

For further information about access arrangements, reasonable adjustments and special consideration please refer to the JCQ website: www.jcq.org.uk

Equality Act 2010 and Pearson equality policy

Equality and fairness are central to our work. Our equality policy requires all students to have equal opportunity to access our qualifications and assessments, and our qualifications to be awarded in a way that is fair to every student.

We are committed to making sure that:

- students 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 students who do not share that characteristic
- all students achieve the recognition they deserve for undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

You can find details on how to make adjustments for students with protected characteristics in the policy document *Access Arrangements, Reasonable Adjustments and Special Considerations*, which is on our website: qualifications.pearson.com

Candidate malpractice

Candidate malpractice refers to any act by a candidate that compromises or seeks to compromise the process of assessment or which undermines the integrity of the qualifications or the validity of results/certificates.

Candidate malpractice in examinations must be reported to Pearson using a *JCQ Form M1* (available at www.jcq.org.uk/exams-office/malpractice). The form can be emailed to pqsmalpractice@pearson.com or can be posted to: Investigations Team, Pearson, 190 High Holborn, London, WC1V 7BH. Please provide as much information and supporting documentation as possible. Note that the final decision regarding appropriate sanctions lies with Pearson.

Failure to report malpractice constitutes staff or centre malpractice.

Staff/centre malpractice

Staff and centre malpractice includes both deliberate malpractice and maladministration of our qualifications. As with candidate malpractice, staff and centre malpractice is any act that compromises or seeks to compromise the process of assessment or which undermines the integrity of the qualifications or the validity of results/certificates.

All cases of suspected staff malpractice and maladministration must be reported immediately, before any investigation is undertaken by the centre, to Pearson on a *JCQ Form M2(a)* (available at www.jcq.org.uk/exams-office/malpractice). The form, supporting documentation and as much information as possible can be emailed to pqsmalpractice@pearson.com or posted to: Investigations Team, Pearson, 190 High Holborn, London, WC1V 7BH. Note that the final decision regarding appropriate sanctions lies with Pearson.

Failure to report malpractice itself constitutes malpractice.

More detailed guidance on malpractice can be found in the latest version of the document *General and Vocational Qualifications Suspected Malpractice in Examinations and Assessments Policies and Procedures*, available at: www.jcq.org.uk/exams-office/malpractice.

Language of assessment

Assessment of this specification will be in English only. Assessment materials will be published in English only and all work submitted for examination must be in English only.

Other information

Total Qualification Time (TQT) and Guided Learning Hours (GLH)

For all regulated qualifications, we specify a total number of hours that students are expected to undertake in order 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, we identify the number of Guided Learning Hours (GLH) 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 students, for example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

TQT and guided learning hours are assigned after consultation with users of the qualifications.

This qualification has a TQT value of 190 and a GLH of 150.

Student recruitment

Pearson follows the JCQ policy concerning recruitment to our qualifications in that:

- they must be available to anyone who is capable of reaching the required standard
- they must be free from barriers that restrict access and progression
- equal opportunities exist for all students.

Prior learning and other requirements

There are no formal entry requirements for this qualification.

Students may be studying in a local language but the assessment will be in English. Pearson recommends students have B1 level of English on the Common European Framework of Reference (CEFR). This will support access to the assessment materials and be able to communicate responses effectively.

Pearson's *Recognition of prior learning policy and process* document can be found at qualifications.pearson.com/policies

Progression

The progression route for the Pearson LCCI Level 3 Certificate in Sales and Account Management is primarily into employment. However, the qualification may also help with progression routes across the LCCI suite to qualification such as:

- Pearson LCCI Level 3 Advanced Diploma in Business
- Pearson LCCI Level 3 Advanced Diploma in Entrepreneurship
- Pearson LCCI Level 3 Diploma and/or Advanced Diploma in Sales and Marketing
- Pearson LCCI Level 3 Advanced Diploma in Marketing.

Exemptions

We are seeking exemptions for our qualifications from a number of professional bodies. For the latest list of exemptions, please visit the Pearson LCCI website, and choose your relevant qualification.

Codes

This qualification is approved by Ofqual and meets the Ofqual General Conditions for inclusion on the Register of Regulated Qualifications. The Qualification Number (QN) is: 603/3242/6.

The subject code for Pearson LCCI Level 3 Certificate in Sales and Account Management is: ASE20203. The subject code is used by centres to enter students for a qualification. Centres will need to use the entry codes only when claiming students' qualifications.

Support, training and resources

Training

Pearson offers support and training to teachers on the standard of delivery and preparing students to meet the assessment requirements.

Specifications, Sample Assessment Materials and Teacher Support Materials

The Pearson LCCI Level 3 Certificate in Sales and Account Management Sample Assessment Materials document can be downloaded from qualifications.pearson.com/lcci

To find a list of all the support documents available please visit qualifications.pearson.com/lcci

Appendices

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Appendix 1: Glossary of International Accounting Standards (IAS) terminology

The following is a glossary of the comparison between the International Accounting Standards terminology and the previously used UK GAAP (Generally Accepted Accounting Practice in the UK) terminology. IAS terminology is used in the content of the LCCI Financial and Quantitative suite of qualifications, although not all terms are present in all levels.

Centres should be aware that these terms are also referred to as International Finance Reporting Standards (IFRP) in certain contexts within the industry. Definitions, however, remain the same.

| IAS terminology | Previously used UK GAAP terminology |
|--|--|
| Financial statements | Final accounts |
| | |
| Statement of comprehensive income | Trading and profit and loss account |
| Revenue | Sales |
| Raw materials/ordinary goods purchased | Purchases |
| Cost of sales | Cost of goods sold |
| Inventory | Stock |
| Work in progress | Work in progress |
| Gross profit | Gross profit |
| Other operating expenses | Sundry expenses |
| Allowance for doubtful debt | Provision for doubtful debt |
| Other operating income | Sundry income |
| Investment revenues/finance income | Interest receivable |
| Finance costs | Interest payable |
| Profit for the year | Net profit |
| Retained earnings | Profit/loss balance |

| IAS terminology | Previously used UK GAAP terminology |
|---|---|
| | |
| Statement of changes in equity (limited companies) | Appropriation account |
| | |
| Statement of financial position | Balance sheet |
| | |
| Non-current assets | Fixed assets |
| Property | Land and buildings |
| Plant and equipment | Plant and equipment |
| Investment property | Investments |
| Intangible assets | Goodwill etc. |
| | |
| Current assets | Current assets |
| Inventory | Stock |
| Trade receivables | Debtors |
| Other receivables | Prepayments |
| Bank and cash | Bank and cash |
| | |
| Current liabilities | Current liabilities/creditors: amounts due within 12 months |
| Trade payables | Creditors |
| Other payables | Accruals |
| Bank overdraft and loans | Loans repayable within 12 months |
| | |
| Non-current liabilities | Long-term liabilities/creditors: amounts falling due after 12 months |
| Bank (and other) loans | Loans repayable after 12 months |
| | |
| | |

| IAS terminology | Previously used UK GAAP terminology |
|--------------------------------|--|
| Capital or equity | Capital |
| Share capital | Share capital |
| Statement of cash flows | Cash flow statement |
| | |
| Other terms | |
| Inventory count | Stock take |
| Carry over | Net book value |

Appendix 2: Key words typically used in assessment

The following table shows the key words that will be used consistently by Pearson in our assessments to ensure that students are rewarded for demonstrating the necessary skills.

Please note: the list below will not necessarily be used in every paper/session and is provided for guidance only.

| Command or term | Definition |
|-------------------|--|
| Give, State, Name | Learners provide an accurate piece of information. |
| Identify | Learners indicate the main features or purpose of something, and/or are able to select relevant information from stimulus material. |
| Define | Learners give a definition of a term or phrase. |
| What is meant by | Learners provide an extended definition that must contain two separate points. |
| Describe | Learners give an account of something, such as steps in a process or characteristics. The response should be developed, but does not require justification or reasoning. |
| Explain | Learners provide reasoning to justify or exemplify a point. The response should be developed using linked points. |
| Analyse | Learners interpret data looking at potential reasons for trends and summarising findings. |
| Discuss | Learners consider different aspects of a topic, how they interrelate, and the extent to which they are important. |
| Evaluate | Learners draw on varied information, themes or concepts to consider aspects such as strengths or weaknesses, advantages or disadvantages, alternative actions and relevance or significance and ultimately provide a substantiated judgement/conclusion. |

| Command or term | Definition |
|-----------------|---|
| Assess | Learners explore themes or concepts and use evidence to determine the relative significance of different factors. |
| Create | Learners prepare copy or plan based on given stimulus, drawing out the key elements from the context. |
| Prepare | Learners use given stimulus to produce materials, showing understanding of the key features and purpose. |

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