Pearson
Edexcel Level 2 NVQ Certificate in Recruitment Resourcing (QCF)

Specification

NVQ qualification

First registration May 2015

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ISBN 978 1 446 92562 1

Contents

Purpose of this specification

This specification sets out:

- the objectives of the qualification
- any other qualification that a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding which the learner is required to have before taking the qualification
- the combination of units that a learner must have completed before the qualification will be awarded and any pathways
- 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
- the method of any assessment and any associated requirements relating to it
- the criteria against which a learner's level of attainment will be measured (such as assessment criteria)
- assessment requirements and/or evidence requirements required as specified by the relevant Sector Skills Council/Standards Setting Body
- assessment requirements/strategy as published by the relevant Sector Skills Council/Standards Setting Body
- the Apprenticeship Framework in which the qualification is included, where appropriate.

1 Introducing Edexcel NVQ qualifications

What are NVQ qualifications?

National Vocational Qualifications (NVQs) are work-based qualifications that give learners the opportunity to develop and demonstrate their competence in the area of work or job role to which the qualification relates.

NVQs are based on the National Occupational Standards (NOS) for the appropriate sector. NOS define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles. At Level 2 and above, these qualifications are recognised as the competence component of Apprenticeship Frameworks. Qualifications at Level 1 can be used in Traineeships, which are stepping-stones to Apprenticeship qualifications. NVQs qualifications can also be delivered as stand-alone for those who wish to take a work-based qualification.

NVQs qualifications are outcomes-based with no fixed learning programme – allowing flexible delivery that meets the individual learner's needs. They are suitable for those in employment or those who are studying at college and have a part-time job or access to a substantial work placement so that they are able to demonstrate the competencies that are required for work.

Most learners will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment requirements/strategy for the sector. Colleges, training centres and/or employers can offer these qualifications provided they have access to appropriate physical and human resources.

There are three sizes of NVQs in the QCF:

- Award (1 to 12 credits)
- Certificate (13 to 36 credits)
- Diploma (37 credits and above).

Every unit and qualification in the QCF has a credit value.

The credit value of a unit specifies the number of credits that will be awarded to a learner who has met the learning outcomes of the unit.

The credit value of a unit is based on:

- one credit for those learning outcomes achievable in 10 hours of learning
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.

2 Qualification summary and key information

Qualification title	Pearson Edexcel Level 2 NVQ Certificate in Recruitment Resourcing (QCF)
QCF Qualification Number (QN)	601/6047/0
Qualification framework	Qualifications and Credit Framework (QCF)
Regulation start date	17/04/2015
Operational start date	01/05/2015
Approved age ranges	16–18 19+ Please note that sector-specific requirements or regulations may prevent learners of a particular age from embarking on this qualification. Please refer to the assessment requirements/strategy.
Credit value	28
Assessment	Portfolio of Evidence (internal assessment).
Guided learning hours	134–154
Grading information	The qualification and units are graded pass/fail.

Qualification title	**Pearson Edexcel Level 2 NVQ Certificate in Recruitment Resourcing (QCF)**
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 7, Access and Recruitment*).
Funding	Details on funding approval will be available in the future on the Learning Aims Reference Service (LARS) database, which replaces the Learning Aim Reference Application (LARA). In the interim, the LARS Lite database is available to check funding approval. Alternatively, the Skills Funding Agency's simplified funding catalogues can be used to check funding approval. Further information and guidance is available on the website: www.gov.uk

Centres will need to use the QCF Qualification Number (QN) when they seek public funding for their learners. As well as a QN, each unit within a qualification has a QCF unit reference number (URN).

The qualification title, unit titles and QN will appear on each learner's final certificate. Centres should tell learners this when recruiting them and registering them with Pearson. There is more information about certification in our *UK Information Manual,* available on our website at: qualifications.pearson.com

3 Qualification rationale

Qualification objectives

The Pearson Edexcel Level 2 NVQ Certificate in Recruitment Resourcing (QCF) is for learners who work in, or who want to work in the recruitment sector, in roles such as Recruitment Resourcer and In-house Resourcer.

It gives learners the opportunity to:

- develop and demonstrate a range of technical skills and behaviours that support competence in the job roles stated above. This includes skills in identifying client requirements, contributing to the development of a recruitment resourcing plan, researching candidates through social media networking and supporting the recruitment process and pre-selecting candidates.
- develop the role-related knowledge to underpin competence in the job roles stated above
- have existing skills recognised
- achieve a nationally-recognised Level 2 qualification
- develop their own personal growth and engagement in learning.

Relationship with previous qualifications

This qualification is a new development and as such does not replace any previous qualifications.

Apprenticeships

Skills CFA include the Pearson Edexcel Level 2 NVQ Certificate in Recruitment Resourcing (QCF) as the competencies component for the Intermediate Apprenticeship in Recruitment Resourcing.

Progression opportunities

Learners who achieve the Pearson Edexcel Level 2 NVQ Certificate in Recruitment Resourcing (QCF) can progress to the Intermediate Apprenticeship in Recruitment Resourcing (completing the Pearson BTEC Level 2 Certificate in Recruitment Resourcing (QCF)). Learners can also progress to higher levels within the recruitment suite of qualifications, to the Pearson Edexcel Level 3 NVQ Diploma in Recruitment (QCF) and the Pearson BTEC Level 3 Certificate in Recruitment Practice (QCF), which together form part of the Advanced Apprenticeship in Recruitment, along with transferable skills. With further development, learners can also progress into job roles requiring a more complex set of skills, such as Junior Recruitment Consultant, Account Representative and Senior Recruitment Consultant.

Industry support and recognition

This qualification is supported by Skills CFA, the Sector Skills Council for pan-sector business skills, which includes the recruitment sector.

Relationship with National Occupational Standards

This qualification is based on the National Occupational Standards (NOS) in Recruitment, which were set and designed by Skills CFA, the Sector Skills Council for the sector.

4 Qualification structure

Pearson Edexcel Level 2 NVQ Certificate in Recruitment Resourcing (QCF)

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

Minimum number of credits that must be achieved	28
Minimum number of credits that must be achieved at Level 2 or above	28
Number of mandatory credits that must be achieved	22
Number of optional credits that must be achieved	6

Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	J/507/0943	Pre-selecting Candidates	2	2	5
2	L/507/0944	Identifying Client Recruitment Requirements	2	2	12
3	R/507/0945	Contributing to the Development of a Recruitment Resourcing Plan	2	2	8
4	Y/507/0946	Researching Candidates Through Social Media Networking	2	3	17
5	D/507/0947	Support the Recruitment Processes	2	3	11
6	H/507/0948	Using Client Relationship Management Systems for Recruitment Purposes	2	3	14
7	K/507/0949	Building and Maintaining Relationships with Candidates	2	2	5
8	R/506/1789	Develop Working Relationships with Colleagues	2	3	19
9	D/507/0950	Researching Candidates for Recruitment Purposes	2	2	11

Unit	Unit reference number	Optional units	Level	Credit	Guided learning hours
10	L/506/1807	Manage Diary Systems	2	2	12
11	A/506/2130	Deliver Customer Service	2	5	27
12	A/506/2158	Resolve Customer Service Problems	2	5	22
13	F/506/2159	Deliver Customer Service to Challenging Customers	2	3	16
14	K/506/2155	Make Telephone Calls to Customers	2	3	16
15	Y/506/2135	Exceed Customer Expectations	2	3	15
16	L/506/1788	Manage Personal Performance and Development	2	4	18
17	H/502/8599	Generating and Qualifying Sales Leads	2	2	15
18	D/507/1368	Selling Face to Face	2	4	25
19	T/502/8588	Preparing and Delivering a Sales Demonstration	2	3	20

5 Programme delivery

Centres are free to offer these qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning) that meets learners' needs. Learners must be in employment or working with a training provider on a programme so that they can develop and demonstrate the occupational competence required.

Whichever mode of delivery is used, centres must make sure that learners have access to specified resources and to the sector specialists delivering and assessing the units. Centres must adhere to the Pearson policies that apply to the different modes of delivery. Our policy on *Collaborative arrangements for the delivery of vocational qualifications* can be found on our website: qualifications.pearson.com

There are various approaches to delivering a successful competence-based qualification. The section below outlines elements of good practice that centres can adopt in relation to learner recruitment, preparation and support, training and assessment delivery, and employer engagement.

Elements of good practice

Learner recruitment, preparation and support

Good practice in relation to learner recruitment, preparation and support includes:

- Providing initial advice and guidance, including work tasters, to potential learners to give them an insight into the relevant industry and the learning programme.
- Using a range of appropriate and rigorous selection methods to ensure that learners are matched to the programme best suited to their needs.
- Carrying out a thorough induction for learners to ensure that they completely understand the programme and what is expected of them. The induction should include, for example, the requirements of the programme, an initial assessment of current competency levels, assessment of individual learning styles, identification of training needs, an individual learning plan, details of training delivery and the assessment process. It is good practice to involve the employer in the induction process. This helps employers to understand what will be taking place during the programme and enables them to start building a relationship with the centre to support the effective delivery of the programme.
- Keeping in regular contact with the learner to keep them engaged and motivated, and ensuring that there are open lines of communication between the learner, the assessor, the employer and teaching staff.

Training and assessment delivery

Good practice in relation to training and assessment delivery includes:

- Offering flexible delivery and assessment to meet the needs of the employer and learner, through the use of a range of approaches, for example virtual learning environments (VLEs), online lectures, video, printable online resources, virtual visits, webcams for distance training, e-portfolios.
- Planning opportunities for the development and practising of skills on the job. On-the-job training presents an excellent opportunity to develop the learner’s routine expertise, resourcefulness, craftspersonship and business-like attitude. It is therefore important that there is intentional structuring of practice and guidance to supplement the learning and development provided through engagement in everyday work activities. Learners need to have structured time to learn and practice their skills separate from their everyday work activities. Teaching and learning methods, such as coaching, mentoring, shadowing, reflective practice, collaboration and consultation, could be used in this structured on-the-job learning.
- Integrating the delivery and assessment of Personal, Learning and Thinking Skills (PLTS) and Employment Rights and Responsibilities (ERR) if the programme is being delivered as a part of an Apprenticeship. It is important that learners understand the relevance of these skills in the workplace and are aware of when and how they will be developing them. Please see *Annexe C* for mapping of PLTS to the units in this specification.
- Developing an holistic approach to assessment by matching evidence to different assessment criteria, learning outcomes and units as appropriate, thereby reducing the assessment burden on learners and assessors. It is good practice to draw up an assessment plan that aligns the units with the learning process and the acquisition of knowledge and skills, and that indicates how and when the units will be assessed.
- Discussing and agreeing with the learner and employer suitable times, dates and work areas where assessment will take place. Learners and employers should be given regular and relevant feedback on performance and progress.

Employer engagement

Good practice in relation to employer engagement includes:

- Communicating with employers at the start of the programme to understand their business context and requirements so that the programme can be tailored to meet their needs.
- Working with the employer to ensure that learners are allocated a mentor in the workplace to assist them in the day-to-day working environment and to act as a contact for the assessor/tutor.
- Helping the employer to better understand their role in the delivery of the programme. It is important that employers understand that sufficient and relevant work must be given to learners in order to provide a culture of learning and to ensure that they are given every opportunity to participate in aspects of continuous professional development (CPD).

6 Centre resource requirements

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

- Centres must have the appropriate physical resources to support delivery and assessment of the qualification. For example, a workplace in line with industry standards, or a Realistic Working Environment (RWE), where permitted, as specified in the assessment strategy for the sector, equipment, IT, learning materials, teaching rooms.
- Where RWE is permitted, it must offer the same conditions as the normal, day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working.
- Centres must meet any specific human and physical resource requirements outlined in the assessment strategy in *Annexe A*. Staff assessing learners must meet the occupational competence requirements within the overarching assessment strategy for the sector.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies, procedures and practices in place for the delivery and assessment of the qualification.
- Centres must deliver the qualification in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 7, Access and recruitment*. For full details on the Equality Act 2010, please go to www.legislation.gov.uk

7 Access and recruitment

Our policy on 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 barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres must ensure that their learner recruitment process is conducted with integrity. This includes ensuring that applicants have appropriate information and advice about the qualification to ensure that it will meet their needs.

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

Prior knowledge, skills and understanding

No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification.

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 and that our qualifications are 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.

For learners with disabilities and specific needs, the assessment of their potential to achieve the qualification must identify, where appropriate, the support that will be made available to them during delivery and assessment of the qualification. Please see the information regarding reasonable adjustments and special consideration in *Section 8, Assessment*.

8 Assessment

To achieve a pass for the full qualification, the learner must achieve all the units required in the stated qualification structure.

Language of assessment

Assessment of the internally assessed units may be in English, Welsh or Irish. If assessment is to be carried out in either Welsh or Irish then centres must inform Pearson at the point of learner registration.

A learner taking the qualification may be assessed in British or Irish Sign Language where it is permitted for the purpose of reasonable adjustment.

Further information on the use of language in qualifications is available in our policy document *Use of languages in qualifications policy,* available on our website at: qualifications.pearson.com

Further information on 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*. Both documents are on our website at: qualifications.pearson.com

Internal assessment

The units in this qualification are assessed through an internally and externally quality assured Portfolio of Evidence made up of evidence gathered during the course of the learner's work.

Each unit has specified learning outcomes and assessment criteria. To pass each unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- prove that the evidence is their own.

The learner must have an assessment record that identifies the assessment criteria that have been met. The assessment record should be cross-referenced to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment. Suitable centre documentation should be used to form an assessment record.

It is important that the evidence provided to meet the assessment criteria for the unit and learning outcomes is:

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the learner
Current	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
Reliable	indicates that the learner can consistently perform at this level
Sufficient	fully meets the requirements of the standards.

Learners can provide evidence of occupational competence from:

- **current practice** – where evidence is generated from a current job role
- a **programme of development** – where evidence comes from assessment opportunities built into a learning programme. The evidence provided must meet the requirements of the Sector Skills Council's assessment requirements/strategy.
- the **Recognition of Prior Learning (RPL)** – where a learner can demonstrate that they can meet a unit's assessment criteria through knowledge, understanding or skills they already possess without undertaking a course of development. They must submit sufficient, reliable, authentic and valid evidence for assessment. Evidence submitted that is based on RPL should give the centre confidence that the same level of skill, understanding and knowledge exists at the time of claim as existed at the time the evidence was produced. RPL is acceptable for accrediting a unit, several units, or a whole qualification.

  Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website at: qualifications.pearson.com
- a combination of these.

Assessment requirements/strategy

The assessment strategy for this qualification is included in *Annexe A*. It sets out the overarching assessment principles and the framework for assessing the units to ensure that the qualification remains valid and reliable. It has been developed by Skills CFA in partnership with employers, training providers, awarding organisations and the regulatory authorities.

Types of evidence

To achieve a unit, the learner must gather evidence that shows that they have met the required standard specified in the assessment criteria, Pearson's quality assurance arrangements (please see *Section 10, Quality assurance of centres*) and the requirements of the assessment requirements/strategy given in *Annexe A*.

In line with the assessment requirements/strategy, evidence for internally assessed units can take a variety of forms as indicated below:

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation (S) – please refer to Assessment strategy for conditions of use
- professional discussion (PD)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

Learners can use the abbreviations in their portfolios for cross-referencing purposes.

Learners can also use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is not necessary for learners to have each assessment criterion assessed separately. They should be encouraged to reference evidence to the relevant assessment criteria. However, the evidence provided for each unit must be clearly reference the unit being assessed. Evidence must be available to the assessor, the internal verifier and the Pearson standards verifier.

Any specific evidence requirements for a unit are given in the *Assessment* section of the unit.

Further guidance on the requirements for centre quality assurance and internal verification processes is available on our website at: qualifications.pearson.com. Please see *Section 12, Further information and useful publications* for details.

Appeals

Centres must have a policy for dealing with appeals from learners. Appeals may relate to incorrect assessment decisions or unfairly conducted assessment. The first step in such a policy is a consideration of the evidence by a Lead Internal Verifier or other member of the programme team. The assessment plan should allow time for potential appeals after learners have been given assessment decisions.

Centres must document all learners' appeals and their resolutions. Further information on the appeals process can be found in the document *Enquiries and appeals about Pearson vocational qualifications policy,* which is available on our website at: qualifications.pearson.com

Dealing with malpractice

Centres must have a policy for dealing with malpractice by learners. This policy must follow the *Pearson Assessment Malpractice Policy,* which is available on our website at: qualifications.pearson.com. Centres must report malpractice to Pearson, particularly if any units have been subject to quality assurance or certification.

Reasonable adjustments to assessment

Centres are able to make adjustments to assessments to take account of the needs of individual learners in line with the guidance given in the document *Pearson Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*. In most instances, adjustments can be achieved by following the guidance; for example allowing the use of assistive technology or adjusting the format of the evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. Any reasonable adjustment must reflect the normal learning or working practice of a learner in a centre or working within the occupational area.

Further information on 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*.

Both documents are on our website at: qualifications.pearson.com

Special consideration

Centres must operate special consideration in line with the guidance given in the document *Pearson Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*. Special consideration may not be applicable in instances where:

- assessment requires the demonstration of practical competence
- criteria have to be met fully
- units/qualifications confer licence to practice.

Centres cannot apply their own special consideration; applications for special consideration must be made to Pearson and can be made only on a case-by-case basis. A separate application must be made for each learner and certification claims must not be made until the outcome of the application has been received.

Further information on special consideration can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*.

Both of the documents mentioned above are on our website at: qualifications.pearson.com

Credit transfer

Credit transfer describes the process of using a credit or credits awarded in the context of a different qualification or awarded by a different awarding organisation towards the achievement requirements of another qualification. All awarding organisations recognise the credits awarded by all other awarding organisations that operate within the QCF.

If learners achieve credits with other awarding organisations, they do not need to retake any assessment for the same units. The centre must keep evidence of unit achievement. Further information on credit transfer can be found in the document *Credit accumulation and transfer policy (England),* which is available on our website at: qualifications.pearson.com

9 Centre recognition and approval

Centre recognition

Centres that have not previously offered Edexcel vocational qualifications need to apply for and be granted centre recognition and approval 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 Edexcel vocational qualifications is available at qualifications.pearson.com.

Approvals agreement

All centres are required to enter into an approval agreement, which 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.

10 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. Centres are required to declare their commitment to ensuring quality and to giving learners appropriate opportunities that lead to valid and accurate assessment outcomes.

Centres must follow quality assurance requirements for standardisation of assessors and internal verifiers and the monitoring and recording of assessment processes. Pearson uses external quality assurance procedures to check that all centres are working to national standards. It gives us the opportunity to identify and provide support to safeguard certification and quality standards. It also allows us to recognise and support good practice.

Centres offering competence-based qualifications will usually receive two standards verification visits per year (a total of two days per year). The exact frequency and duration of standards verifier visits will reflect the centre’s performance, taking account of the:

- number of assessment sites
- number and throughput of learners
- number and turnover of assessors
- number and turnover of internal verifiers.

For centres offering a full Pearson BTEC Apprenticeship (i.e. all elements of the Apprenticeship are delivered with Pearson through registration of learners on a BTEC Apprenticeship framework) a single standards verifier will normally be allocated to verify all elements of the BTEC Apprenticeship programme. Centres should make use of our one-click learner registration to access this facility. If a centre is also offering stand-alone NVQs/Competence-based qualifications in the same sector as a full BTEC Apprenticeship, the same standards verifier should be allocated. If a centre is also offering stand-alone BTEC qualifications in the same sector as a full BTEC Apprenticeship, a different quality assurance model applies.

In order for certification to be released, confirmation is required that the National Occupational Standards (NOS) for assessment and verification, and for the specific occupational sector are being met consistently.

For further details, please go to the *NVQ Quality Assurance Centre Handbook,* the *BTEC Apprenticeships Quality Assurance Handbook* and the *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* on our website at qualifications.pearson.com

11 Unit format

Each unit has the following sections.

Unit title

The unit title is on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).

Unit reference number

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

QCF level

All units and qualifications within the QCF have a level assigned to them. There are nine levels of achievement, from Entry to Level 8. The QCF Level Descriptors inform the allocation of the level.

Credit value

All units have a credit value. When a learner achieves a unit, they gain the specified number of credits. The minimum credit value is 1 and credits can be awarded in whole numbers only.

Guided learning hours

Guided learning hours are the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim for a programme. This definition includes workplace guidance to support the development of practical job-related skills, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes the time spent by staff assessing learners' achievements, for example in the assessment of competence for competency-based qualifications.

Unit summary

This summarises the purpose of the unit and the learning the unit offers.

Unit assessment requirements/evidence requirements

The SSC/B set the assessment/evidence requirements. Learners must provide evidence according to each of the requirements stated in this section.

Learning outcomes

The learning outcomes set out what a learner will know, understand or be able to do as the result of a process of learning.

Assessment criteria

Descriptions of the requirements a learner is expected to meet to demonstrate that a learning outcome has been achieved.

Unit 1: Pre-selecting Candidates

Unit reference number: J/507/0943

QCF level: 2

Credit value: 2

Guided learning hours: 5

Unit summary

In this unit, you will learn how to pre-select and present pre-selected candidates. The unit will enable you to identify the criteria against which candidates will be assessed and to assess candidates against the agreed criteria. In order to prepare to present pre-selected candidates, you will record the suitability and availability of those who are pre-selected and the prospects of those who do not meet the criteria. It is important that organisational standards and procedures are followed, so that you will be able to inform those who are not pre-selected of the outcome. You should inform unsuccessful candidates in accordance with organisational standards and procedures, while ensuring that pre-selection processes meet legal and ethical requirements.

You will learn how to present pre-selected candidates in the agreed format and timescale and be able to explain how the candidates meet the client's staffing requirements.

Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skills CFA Assessment Strategy in *Annexe A*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to pre-select candidates	1.1	Identify the criteria against which the candidates will be assessed			
		1.2	Assess candidates against the agreed criteria			
		1.3	Record the suitability and availability of those pre-selected			
		1.4	Record prospects who do not meet the criteria but who may be possible alternatives for other jobs			
		1.5	Inform those who are not pre-selected of the outcome in accordance with organisational standards and procedures			
		1.6	Ensure all pre-selection processes meet legal and ethical requirements			
2	Be able to present pre-selected candidates	2.1	Present pre-selected candidates in the agreed format and timescale			
		2.2	Explain how the pre-selected candidates meet the client's staffing requirements			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

Internal verifier signature: ______________________________ Date: ____________________
(*if sampled*)

Unit 2: Identifying Client Recruitment Requirements

Unit reference number: L/507/0944

QCF level: 2

Credit value: 2

Guided learning hours: 12

Unit summary

In this unit, you will gain knowledge of how to identify clients' recruitment requirements, including the methods used, the types of candidate experience, skills, qualifications and attributes that may be required by a client and the different contractual terms for staff that may be required by a client.

This unit will enable you to establish role requirements by using valid sources of information, recording role profiles, job descriptions, person specifications and/or vacancy details in the agreed format(s). You will gain an understanding of the differences between job descriptions and person specifications and the information needed for each. You will learn how to provide information on the services to be offered, the terms of business and timescales.

Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skills CFA Assessment Strategy in *Annexe A*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know how to identify clients' recruitment requirements	1.1	Describe the methods used to identify clients' recruitment requirements			
		1.2	Identify the types of experience, skills, qualifications and attributes that may be required by a client for a particular sector			
		1.3	Define the different contractual terms for staff that may be required by a client			
2	Be able to establish role requirements	2.1	Establish the requirements of the roles using valid sources of information			
		2.2	Record role profiles, job descriptions, person specifications and/or vacancy details in the agreed format(s)			
		2.3	Explain the distinctions between job descriptions and person specifications and the information needed for each			
3	Be able to provide information to confirm recruitment arrangements with clients	3.1	Provide information on the services to be offered			
		3.2	Provide information on the terms of business and timescales			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

Internal verifier signature: ______________________________ Date: ____________________
(*if sampled*)

Unit 3: Contributing to the Development of a Recruitment Resourcing Plan

Unit reference number: R/507/0945

QCF level: 2

Credit value: 2

Guided learning hours: 8

Unit summary

In this unit, you will learn how to contribute to the development of a recruitment resourcing plan. The unit will enable you to support clients in meeting their recruitment needs, by understanding the role of the client and being able to identify their recruitment and selection preferences and/or processes. You will also gain an understanding of the importance of selecting the best method of recruitment and selection, whilst ensuring that all policies, materials and processes are in line with organisational policy and procedures.

You will know the components of a recruitment resourcing plan and be able to ensure that the plan specifies the client's chosen recruitment and selection method(s) and that it meets both legal and ethical requirements.

Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skills CFA Assessment Strategy in *Annexe A*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to support the client to meet their recruitment needs	1.1	Explain the role of the client in the development of a recruitment resourcing plan			
		1.2	Identify the client's recruitment and selection preferences and/or processes			
		1.3	Explain the importance of selecting the best method(s) of recruitment and selection for a range of roles			
		1.4	Describe potential adverse effects associated with particular recruitment methods			
		1.5	Ensure all recruitment policies, materials and processes are in line with organisational policy and procedures			
2	Be able to contribute to the overall development of a recruitment resourcing plan	2.1	Describe the components of a recruitment resourcing plan			
		2.2	Ensure the plan specifies the client's chosen recruitment and selection method(s) and is achievable within the agreed budget and timescale			
		2.3	Ensure the resourcing plan meets legal and ethical requirements			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

Internal verifier signature: ______________________________ Date: ____________________
(*if sampled*)

Unit 4: Researching Candidates Through Social Media Networking

Unit reference number: Y/507/0946

QCF level: 2

Credit value: 3

Guided learning hours: 17

Unit summary

In this unit, you will gain an understanding of the use, benefits and risks of using social media networking to conduct a candidate search and the ethical considerations concerning the use of social media networks. You will also gain an understanding of how social media networks are used, what an online identity is, and the advantages and disadvantages of using social media networks to research candidates.

The unit will enable you to create a social networking profile, including choosing secure passwords, setting appropriate privacy levels and uploading digital media content to a social media site in order to promote a product or service. You will also be able to create a social media group or network in order to attract candidates, whilst adhering to organisational policies and procedures, and legal and ethical requirements.

Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skills CFA Assessment Strategy in *Annexe A*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the benefits and risks of using social media networking to conduct a candidate search	1.1	Describe the use of social media networking to conduct a candidate research			
		1.2	Describe the benefits and risks of using social media networking to conduct a candidate search			
		1.3	Describe the risks of using social media networking when conducting a candidate search			
		1.4	Identify the guidelines and ethical considerations concerning the use of social media networks			
2	Understand how social media networks are used	2.1	Identify social networking sites used by the organisation			
		2.2	Describe what is meant by an online identity			
		2.3	Explain the advantages and disadvantages of using social networks to research candidates			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to create a social networking profile	3.1	Use a social media application template to create a profile for a product or service			
		3.2	Choose secure passwords for social media accounts			
		3.3	Set appropriate privacy levels for social media accounts			
		3.4	Upload digital media content to a social media site to promote a product or service			
		3.5	Add contacts to a social media profile			
4	Be able to create a social media group or network to attract candidates	4.1	Send messages to others using social media to attract candidates			
		4.2	Create a group in a social media site to share information to attract candidates			
		4.3	Post comments to a social network to attract candidates			
		4.4	Adhere to organisational policies and procedures, legal and ethical requirements			

Learner name: ______________________________ Date: ____________________

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Assessor signature: ______________________________ Date: ____________________

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(*if sampled*)

Unit 5: Support the Recruitment Processes

Unit reference number: D/507/0947

QCF level: 2

Credit value: 3

Guided learning hours: 11

Unit summary

In this unit, you will learn how to administer tasks within the recruitment process. This includes taking action to ensure that current and up-to-date job descriptions and person specifications are available, recording and monitoring client and candidate information and managing responses in accordance with the candidate attraction plan, whilst understanding the organisational procedures for the recruitment of personnel.

The unit will enable you to administer the selection process, by making arrangements for assessment events, inviting candidates and managing the administration of the events. You will also be able to carry out the agreed pre-employment checks and communicate offers in accordance with organisational standards and procedures, to ensure compliance with the recruitment process.

Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skills CFA Assessment Strategy in *Annexe A*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to administer tasks within the recruitment process	1.1	Take action to ensure that current and up-to-date job descriptions and person specifications are available for the roles being recruited			
		1.2	Confirm that terms of business have been agreed and issued			
		1.3	Record and monitor client and candidate information			
		1.4	Place advertisements in the chosen media and locations in accordance with the candidate attraction plan			
		1.5	Make effective use of internet and social media recruitment in accordance with the candidate attraction plan			
		1.6	Manage responses in accordance with the candidate attraction plan			
		1.7	Explain organisational procedures for the recruitment of personnel			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to administer the selection process	2.1	Make arrangements for assessment events in accordance with the resourcing plan			
		2.2	Invite shortlisted candidates to assessment events in accordance with organisational procedures			
		2.3	Arrange for any tests to be administered in accordance with the resourcing plan			
		2.4	Manage the administration of the assessment event in accordance with organisational procedures			
		2.5	Arrange for financial actions, within limit of own authority, to be carried out in accordance with organisational procedures			
3	Be able to ensure compliance with the recruitment process	3.1	Confirm that the terms and conditions have been provided to the candidate			
		3.2	Carry out the agreed pre-employment checks in accordance with organisational standards and procedures			
		3.3	Communicate offers in accordance with organisational standards and procedures			
		3.4	Keep databases up to date and maintain the requirements of confidentiality			

Learner name: ______________________________ Date: ____________________

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Assessor signature: ______________________________ Date: ____________________

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(*if sampled*)

Unit 6: Using Client Relationship Management Systems for Recruitment Purposes

Unit reference number:	**H/507/0948**
QCF level:	**2**
Credit value:	**3**
Guided learning hours:	**14**

Unit summary

In this unit, you will gain an understanding of Client Relationship Management (CRM) for recruitment purposes and the importance of maintaining the currency, security and sufficiency of information contained within a CRM system.

The unit will enable you to administer a candidate database, including ensuring that there is sufficient information about candidates to enable matching to take place and keeping the candidate database up to date. You will also be able to store, retrieve and archive candidate information, through storing candidate information in approved locations in line with organisational procedures, retrieving any requested candidate information and archiving candidate information whilst adhering to legal and ethical requirements.

The unit will also enable you to use a CRM system to match candidates to meet client requirements, including identifying suitable job opportunities that meet candidates' expectations, confirming that candidates have a 'right to work' in the UK and presenting the information in a format that clearly shows the nature and details of the selection assessment.

Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skills CFA Assessment Strategy in *Annexe A*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of Client Relationship Management (CRM) for recruitment purposes	1.1	Describe how CRM systems can be used for recruitment purposes			
		1.2	Describe the features of a CRM system			
		1.3	Explain the importance of maintaining the currency, security and sufficiency of information contained within a CRM system			
2	Be able to administer a candidate database	2.1	Take action to ensure the candidates listed on the candidate database meet the agreed criteria of the client			
		2.2	Ensure that there is sufficient information about candidates to enable matching to take place			
		2.3	Keep the candidate database up to date			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to store, retrieve and archive candidate information	3.1	Store candidate information in approved locations in accordance with organisational procedures			
		3.2	Retrieve any requested candidate information within the agreed timescale			
		3.3	Archive candidate information in accordance with organisational procedures within the agreed timescale			
		3.4	Keep archived candidate information up-to-date and indexed			
		3.5	Adhere to legal and ethical requirements			
4	Be able to use a CRM system to match candidates to meet client requirements	4.1	Identify suitable job opportunities that meet candidates' expectations			
		4.2	Identify potential candidates that meet client requirements			
		4.3	Prepare information to enable the promotion of suitable candidates to clients and suitable clients to candidates			
		4.4	Follow organisational procedures to confirm that candidates have a 'right to work' in the UK			
		4.5	Present the information in a format that clearly shows the nature and details of the selection assessment			
		4.6	Ensure all activities are undertaken in line with legal and ethical practice			

Learner name: ______________________________ Date: ____________________

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(*if sampled*)

Unit 7: Building and Maintaining Relationships with Candidates

Unit reference number: K/507/0949

QCF level: 2

Credit value: 2

Guided learning hours: 5

Unit summary

In this unit, you will be able to build long-term relationships with candidates, including identifying candidates' needs, wants and expectations, responding to their requests and need for information and informing them of the progress of any application. You will also confirm that candidates' expectations have been met, while maintaining the security of candidates' personal information.

The unit will also enable you to maintain on-going and post-placement relationships. This includes identifying new ways of helping candidates and added value that the organisation could offer candidates to create loyalty and bringing any services that may interest them to their attention. You will also be able to share feedback from candidates with stakeholders and review their experiences in order to improve the recruitment process.

Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skills CFA Assessment Strategy in *Annexe A*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to build long term relationships with candidates	1.1	Identify candidates' needs, wants and expectations			
		1.2	Respond to candidates' requests and need for information in line with organisational requirements			
		1.3	Inform candidates of the progress of any application and the need to involve other colleagues			
		1.4	Confirm that candidates' expectations have been met in line with any service offer			
		1.5	Maintain the security of candidates' personal information			
2	Be able to maintain on-going and post-placement relationships	2.1	Identify new ways of helping candidates based on their feedback			
		2.2	Identify added value that the organisation could offer candidates to create loyalty			
		2.3	Bring to candidates' attention any services that may interest them			
		2.4	Share feedback from candidates with stakeholders			
		2.5	Review candidates' experiences as a means of improving the recruitment process			

Learner name: ______________________________ Date: ____________________

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(*if sampled*)

Unit 8: Develop Working Relationships with Colleagues

Unit reference number: R/506/1789

QCF level: 2

Credit value: 3

Guided learning hours: 19

Unit summary

In this unit, you will gain an understanding of the principles of effective team working, including the benefits of effective team working, conflict management techniques used to resolve team conflicts and the importance of warning colleagues of problems and changes that may affect them. The unit will enable you to maintain effective working relationships with colleagues, through treating colleagues with respect, fairness and courtesy and providing support and constructive feedback to them.

You will also be able to consider others' viewpoints when making decisions and take action to minimise disruption to business activities within your own level of authority, in order to collaborate with colleagues to resolve problems.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership, in *Annexe B*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the principles of effective team working	1.1	Outline the benefits of effective team working			
		1.2	Describe how to give feedback constructively			
		1.3	Explain conflict management techniques that may be used to resolve team conflicts			
		1.4	Explain the importance of giving team members the opportunity to discuss work progress and any issues arising			
		1.5	Explain the importance of warning colleagues of problems and changes that may affect them			
2	Be able to maintain effective working relationships with colleagues	2.1	Recognise the contribution of colleagues to the achievement of team objectives			
		2.2	Treat colleagues with respect, fairness and courtesy			
		2.3	Fulfil agreements made with colleagues			
		2.4	Provide support and constructive feedback to colleagues			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to collaborate with colleagues to resolve problems	3.1	Take others' viewpoints into account when making decisions			
		3.2	Take ownership of problems within own level of authority			
		3.3	Take action to minimise disruption to business activities within their own level of authority			
		3.4	Resolve problems within their own level of authority and agreed contribution			

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(*if sampled*)

Unit 9: Researching Candidates for Recruitment Purposes

Unit reference number: D/507/0950

QCF level: 2

Credit value: 2

Guided learning hours: 11

Unit summary

In this unit, you will gain an understanding of how to search for candidate information for recruitment purposes, the advantages and disadvantages of Boolean searching, techniques used to search for candidate information and the purpose of recording and storing the search results.

The unit will enable you to agree aims, objectives and deadlines for the information search, carry out a search of identified sources of information for candidates within agreed deadlines and ensure that any candidates found meet the agreed client requirements.

Unit assessment requirements/evidence requirements

There are no specific assessment requirements for this unit. Please refer to the overall Skills CFA Assessment Strategy in *Annexe A*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to search for candidate information for recruitment purposes	1.1	Explain the importance of agreeing aims, objectives and deadlines when researching for candidate information			
		1.2	Explain the advantages and disadvantages of Boolean searching			
		1.3	Describe techniques used to search for candidate information			
		1.4	Describe sources of candidate information for recruitment purposes			
		1.5	Explain the purpose of recording and storing the search results			
2	Be able to search for candidate information for recruitment purposes	2.1	Agree aims, objectives and deadlines for the information search			
		2.2	Carry out a search of identified sources of information for candidates within agreed deadlines			
		2.3	Ensure that any candidates found meet the agreed client requirements			
		2.4	Record the search results in accordance with organisational policies			

Learner name: ______________________________ Date: ____________________

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(*if sampled*)

Unit 10: Manage Diary Systems

Unit reference number: L/506/1807

QCF level: 2

Credit value: 2

Guided learning hours: 12

Unit summary

In this unit, you will learn about the management of diary systems, including the importance of keeping diary systems up to date, any constraints relating to making bookings and the types of problems that can occur when managing diaries.

The unit will enable you to manage diary systems, obtaining the information needed to make diary entries, responding to changes in a way that balances and meets the needs of those involved whilst maintaining the requirements of confidentiality.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership, in *Annexe B*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the management of diary systems	1.1	Explain the importance of keeping diary systems up to date			
		1.2	Describe the basis on which bookings and changes are prioritised			
		1.3	Explain any constraints relating to making bookings for people or facilities			
		1.4	Describe the types of problems that can occur when managing diaries			
2	Be able to manage diary systems	2.1	Obtain the information needed to make diary entries			
		2.2	Make accurate and timely diary entries			
		2.3	Respond to changes in a way that balances and meets the needs of those involved			
		2.4	Communicate up-to-date information to everyone involved			
		2.5	Keep diaries up-to-date			
		2.6	Maintain the requirements of confidentiality			

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(*if sampled*)

Unit 11: Deliver Customer Service

Unit reference number: A/506/2130

QCF level: 2

Credit value: 5

Guided learning hours: 27

Unit summary

In this unit, you will gain an understanding of customer service delivery, from the relationship between customers' needs and expectations and customer satisfaction, to the importance of treating customers as individuals to methods of measuring your own effectiveness in the delivery of customer service. You will learn about the relationship between customer service and a brand, including the importance of a brand to an organisation, how the brand affects an organisation's customer service offer and your own role in ensuring that a brand's promise is delivered.

The unit will enable you to provide customer service, through maintaining organisational standards of presentation and behaviour when providing customer service and responding to customers' requests, whilst adhering to organisational policies and procedures, and legal and ethical requirements.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership, in *Annexe B*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand customer service delivery	1.1	Explain the relationship between customers' needs and expectations and customer satisfaction			
		1.2	Describe the features and benefits of an organisation's products and/or services			
		1.3	Explain the importance of treating customers as individuals			
		1.4	Explain the importance of balancing promises made to customers with the needs of an organisation			
		1.5	Explain when and to whom to escalate problems			
		1.6	Describe methods of measuring their own effectiveness in the delivery of customer service			
2	Understand the relationship between customer service and a brand	2.1	Explain the importance of a brand to an organisation			
		2.2	Explain how a brand affects an organisation's customer service offer			
		2.3	Explain the importance of using customer service language that supports a brand promise			
		2.4	Identify their own role in ensuring that a brand promise is delivered			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to prepare to deal with customers	3.1	Keep up to date with an organisation's products and/or services			
		3.2	Prepare resources that are necessary to deal with customers before starting work			
4	Be able to provide customer service	4.1	Maintain organisational standards of presentation and behaviour when providing customer service			
		4.2	Adapt their own behaviour to meet customers' needs or expectations			
		4.3	Respond to customers' requests in line with organisational guidelines			
		4.4	Inform customers of the progress of their requests			
		4.5	Confirm that customers' expectations have been met in line with the service offer			
		4.6	Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service			
5	Be able to support improvements to customer service delivery	5.1	Identify ways that customer service could be improved for an organisation and individuals			
		5.2	Share information and ideas with colleagues and/or service partners to support the improvement of service delivery			

Learner name: ____ Date: ________________________

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(*if sampled*)

Unit 12: Resolve Customer Service Problems

Unit reference number: A/506/2158

QCF level: 2

Credit value: 5

Guided learning hours: 22

Unit summary

In this unit, you will gain an understanding of how to resolve customer service problems, from an organisation's customer service and complaints procedures, to techniques to deal with situations where customers become agitated or angry, to methods for encouraging customers to provide feedback.

The unit will enable you to resolve customer service problems, by identifying the nature and cause of customer service problems, agreeing with customers the option that best meets their needs and those of the organisation. You will understand the importance of sharing customer feedback with others to improve the resolution of customer service problems, whilst adhering to organisational policies and procedures, and legal and ethical requirements. You will also be able to explain to customers why problems cannot be resolved, referring them to other sources of help where necessary, in order to manage unresolved customer service problems.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership, in *Annexe B*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the resolution of customer service problems	1.1	Describe an organisation's customer service and complaints procedures			
		1.2	Describe techniques to identify customer service problems and their causes			
		1.3	Describe techniques to deal with situations where customers become agitated or angry			
		1.4	Explain the limits of their own authority for resolving customers' problems and making promises			
		1.5	Explain the purpose of encouraging customers to provide feedback			
		1.6	Describe methods used to encourage customers to provide feedback			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to resolve customer service problems	2.1	Identify the nature and cause of customer service problems			
		2.2	Identify workable options for resolving problems within organisational guidelines			
		2.3	Use the most appropriate method of communication for dealing with customers			
		2.4	Agree with customers the option that best meets their needs and those of the organisation			
		2.5	Keep customers informed of progress			
		2.6	Fulfil promises made to customers during the resolution process			
		2.7	Share customer feedback with others to improve the resolution of customer service problems			
		2.8	Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems			
3	Be able to manage unresolved customer service problems	3.1	Explain to customers the reasons why problems cannot be resolved			
		3.2	Refer customers to other sources of help if their problems cannot be resolved			

Learner name: ________________________________ Date: ____________________

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(*if sampled*)

Unit 13: Deliver Customer Service to Challenging Customers

Unit reference number: F/506/2159

QCF level: 2

Credit value: 3

Guided learning hours: 16

Unit summary

In this unit, you will learn about the delivery of customer service to challenging customers, including the different types of challenging customer, behaviours that make it challenging to deal with these types of customers and techniques used to deal with this behaviour.

The unit will enable you to deal with challenging customers, through expressing understanding of customers' point of view without admitting liability, being able to explain to customers the reasons for an organisation's position and policy, and agreeing a way forward that balances customer satisfaction and organisational needs.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership, in *Annexe B*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the delivery of customer service to challenging customers	1.1	Describe different types of challenging customers in the customer service environment			
		1.2	Explain an organisation's procedures and standards of behaviour for dealing with challenging customers			
		1.3	Explain behaviours that make it challenging to deal with customers			
		1.4	Explain the difference between assertive and aggressive behaviour			
		1.5	Describe techniques to deal with customers' challenging behaviour			
		1.6	Explain their own levels of authority for agreeing actions outside the service offer			
		1.7	Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to deal with challenging customers	2.1	Identify the signs that indicate that a customer is challenging			
		2.2	Express understanding of customers' point of view without admitting liability			
		2.3	Explain to customers the limits of the service they can offer			
		2.4	Explain to customers the reasons for an organisation's position and policy			
		2.5	Agree a way forward that balances customer satisfaction and organisational needs			
		2.6	Obtain help from colleagues when options for action are beyond their level of authority			
		2.7	Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers			

Learner name: ______________________________ Date: ____________________

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(*if sampled*)

Unit 14: Make Telephone Calls to Customers

Unit reference number: K/506/2155

QCF level: 2

Credit value: 3

Guided learning hours: 16

Unit summary

In this unit, you will gain an understanding of how to make telephone calls to customers, including legislation and regulations relating to the use of customer information when planning to make calls, how body language and facial expressions can be detected over the telephone and how to handle abusive calls from customers.

The unit will enable you to plan telephone calls to customers, through identifying the objectives of calls and customers' likely responses and how to deal with them. You will also learn how to make telephone calls to customers, by confirming the identity of customers in line with organisational guidelines, making the customer aware of the purpose of the call and completing agreed follow-up actions after closing the telephone call.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership, in *Annexe B*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to make telephone calls to customers	1.1	Explain the legislation and regulations relating to the use of customer information when planning to make calls			
		1.2	Explain the importance of keeping customer information up to date			
		1.3	Explain the reasons for organisational guidance on dealing with telephone calls			
		1.4	Explain the reasons for organisational identity checking processes			
		1.5	Explain how body language and facial expressions can be detected over the telephone			
		1.6	Describe different questioning techniques when dealing with customers			
		1.7	Explain organisational guidelines for what can and cannot be said or promised			
		1.8	Explain how to handle abusive calls from customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to plan telephone calls to customers	2.1	Identify the objective(s) of calls			
		2.2	Prepare the information needed to make calls			
		2.3	Plan the structure of calls			
		2.4	Identify customers' likely responses and how they can be dealt with			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to make telephone calls to customers	3.1	Use telecommunications equipment in accordance with organisational standards			
		3.2	Confirm the identity of customers in line with organisational guidelines			
		3.3	Make the customer aware of the purpose of the call as early as possible			
		3.4	Speak clearly, concisely and politely, using speech and tone to create rapport			
		3.5	Adapt their own communication style to meet customers' needs			
		3.6	Listen actively to what customers are saying to collect as much information as possible			
		3.7	Give clear and concise information that meets customers' needs			
		3.8	Record information in line with organisational guidelines			
		3.9	Complete agreed follow up actions after closing the telephone call			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

Internal verifier signature: ______________________________ Date: ____________________
(*if sampled*)

Unit 15: Exceed Customer Expectations

Unit reference number: Y/506/2135

QCF level: 2

Credit value: 3

Guided learning hours: 15

Unit summary

In this unit, you will gain an understanding of how to exceed customer expectations, including how customers form expectations of the service they will receive, and legislation, organisational policies and procedures that can limit or vary the service offer.

The unit will also enable you to exceed customer expectations, through making offers to customers within your own authority level, identifying options that offer added value and recording agreements made and actions taken.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership, in *Annexe B*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to exceed customer expectations	1.1	Explain how customers form expectations of the service they will receive			
		1.2	Explain legislation, organisational policies and procedures that can limit or vary the service offer			
		1.3	Explain the types of actions that customers are likely to perceive as adding value			
		1.4	Explain how to recognise when actions taken to offer added value could be built into the service offer			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to exceed customer expectations	2.1	Identify differences between customers' expectations and needs and the service offer			
		2.2	Explain the service offer clearly and concisely to customers			
		2.3	Identify options that offer added value without affecting other customers adversely			
		2.4	Make offers to customers within their own authority levels			
		2.5	Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer			
		2.6	Record agreements made and actions taken			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

Internal verifier signature: ______________________________ Date: ____________________
(*if sampled*)

Unit 16: Manage Personal Performance and Development

Unit reference number:	**L/506/1788**
QCF level:	**2**
Credit value:	**4**
Guided learning hours:	**18**

Unit summary

In this unit, you will be able to manage personal performance, by agreeing specific, measurable, attainable, realistic and time-bound (SMART) objectives, criteria for measuring progress and achievement with the line manager and measures needed to resolve any problems with personal performance. The unit will also enable you to manage your own time and workload, taking action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives.

You will also be able to identify your own development needs, through organisational policies relating to personal development, the identification of your own preferred learning style(s) and using feedback from others. Finally, the unit will enable you to fulfil a personal development plan, making use of formal development opportunities consistent with business needs, reviewing progress against agreed objectives and amending the plan accordingly.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership, in *Annexe B*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to manage personal performance	1.1	Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager			
		1.2	Agree criteria for measuring progress and achievement with line manager			
		1.3	Complete tasks to agreed timescales and quality standards			
		1.4	Report problems beyond their own level of competence and authority to the appropriate person			
		1.5	Take action needed to resolve any problems with personal performance			
2	Be able to manage their own time and workload	2.1	Plan and manage workloads and priorities using time management tools and techniques			
		2.2	Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives			
		2.3	Explain the benefits of achieving an acceptable "work-life balance"			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to identify their own development needs	3.1	Identify organisational policies relating to personal development			
		3.2	Explain the need to maintain a positive attitude to feedback on performance			
		3.3	Explain the potential business benefits of personal development			
		3.4	Identify their own preferred learning style(s)			
		3.5	Identify their own development needs from analyses of the role, personal and team objectives			
		3.6	Use feedback from others to identify their own development needs			
		3.7	Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to fulfil a personal development plan	4.1	Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms			
		4.2	Make use of formal development opportunities that are consistent with business needs			
		4.3	Use informal learning opportunities that contribute to the achievement of personal development objectives			
		4.4	Review progress against agreed objectives and amend plans accordingly			
		4.5	Share lessons learned with others using agreed communication methods			

Learner name: ____ Date: ______________________

Learner signature: _____________________________________ Date: ______________________

Assessor signature: ____________________________________ Date: ______________________

Internal verifier signature: ______________________________ Date: ______________________
(*if sampled*)

Unit 17: Generating and Qualifying Sales Leads

Unit reference number: H/502/8599

QCF level: 2

Credit value: 2

Guided learning hours: 15

Unit summary

In this unit, you will gain an understanding of the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads. You will learn about organisational practices for acquiring contact lists and databases and the ethical codes of conduct relating to the generating and qualifying of leads. You will also gain an understanding of the process of generating and qualifying sales leads, including how customers are segmented, how to identify and access key decision makers and how the information provided by customers is assessed for potential up-selling and cross-selling.

The unit will also enable you to prospect for customers, including identifying the target market customer and prospects according to agreed criteria, and recording details of sales contact in accordance with organisation procedures.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for 2010 Sales Standards, in *Annexe C*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads	1.1	Describe the organisational practices for acquiring contact lists and databases			
		1.2	Describe the practices relating to the sharing of customer information across the organisation			
		1.3	Identify the legislation and regulation relating to generating and qualifying sales leads			
		1.4	Explain the ethical codes of conduct relating to the generating and qualifying of leads			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand the process of generating and qualifying sales leads	2.1	Explain how customers are segmented			
		2.2	Explain why and when different methods of contacting a prospect should be used			
		2.3	Explain how to identify and access key decision makers			
		2.4	Explain the importance of establishing buying needs and the contact's attitude to buying			
		2.5	Explain how the information provided by customers is assessed for potential up selling and cross selling			
		2.6	Explain how to identify customers who have high order value potential or up selling and cross selling opportunities			
3	Be able to prospect for customers	3.1	Identify the target market customers and prospects according to the agreed criteria			
		3.2	Source and gather market and prospect information according to the agreed criteria			
		3.3	Qualify the sales contact according to the agreed criteria			
		3.4	Record details of sales contact in accordance with organisational procedures			

Learner name: ______________________________ Date: ____________________

Learner signature: ____________________________ Date: ____________________

Assessor signature: ___________________________ Date: ____________________

Internal verifier signature: _____________________ Date: ____________________
(*if sampled*)

Unit 18: Selling Face to Face

Unit reference number: D/507/1368

QCF level: 2

Credit value: 4

Guided learning hours: 25

Unit summary

In this unit, you will gain an understanding of how to sell to customers face to face, including the differences between proactive and reactive selling, the types of listening and questioning techniques used and how to involve the prospect in reaching the solutions to sales problems.

The unit will enable you to prepare for the sale, by developing a structured sales plan for the meeting and selecting resources to be used during contact with the customer. You will also be able to conduct a face to face sales meeting with the customer, following organisational standards of personal presentation when meeting customers whilst behaving in a way that is likely to develop a rapport with the customer. You will be able to identify sales objections prior to dealing with the customer, evaluate potential trade-offs that will be mutually beneficial to the customer and to the organisation. You will also be able to resolve customer queries about the product and/or service in order to deal with sales objections during face to face sales situations.

Finally, the unit will enable you to close the sale, including performing a trial close to establish whether further objections exist and then gaining a commitment from the customer to close the sale.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for 2010 Sales Standards, in *Annexe C*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to sell to customers face to face	1.1	Explain the differences between proactive and reactive selling			
		1.2	Explain how techniques such as cross-selling, up-selling and the sale of add-ons can be applied when selling in face to face situations			
		1.3	Describe the types of listening and questioning techniques used for selling in face to face situations			
		1.4	Explain how to interpret non-verbal behaviour in face to face sales situations			
		1.5.	State the differences between benefits and features			
		1.6	Describe the different methods used to sell benefits			
		1.7	Explain how to involve the prospect in reaching solutions to sales problems			
2	Be able to prepare for the sale	2.1	Develop a structured sales plan for the meeting that makes effective use of the time available			
		2.2	Select resources to be used during contact with the customer that are consistent with the plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to conduct a face to face sales meeting with the customer	3.1	Follow organisational standards of personal presentation when meeting customers			
		3.2	Work within social and cultural constraints relating to the sector/industry and/or customer			
		3.3	Behave in a way that is likely to develop a rapport with the customer			
		3.4	Identify customer requirements through the use of questioning and active listening			
		3.5	Confirm customer requirements by summarising their buying needs and interests			
		3.6	Identify products and/or services which match the customer's needs and confirm with the customer that they are suitable			
		3.7	Communicate unique selling points to the customer			
		3.8	Provide the customer with opportunities to discuss and assess features and benefits of products and/or services			
		3.9	Interpret buying signals and act on them to progress the sale			
		3.10	Provide the customer with materials to support the promotion of products and/or services			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to deal with sales objections during face to face sales situations	4.1	Identify sales objections prior to dealing with the customer			
		4.2	Clarify objections and identify potential sales opportunities from them			
		4.3	Evaluate potential trade-offs that will be mutually beneficial to the customer and to the organisation			
		4.4	Record any area in which the product and/or service does not meet the customer's requirements			
		4.5	Resolve customer queries about the product and/or service			
		4.6	Reassure the customer and confirm their objections have been overcome			
5	Be able to close the sale	5.1	Perform a trial close to establish whether or not further objections exist			
		5.2	Gain a commitment from the customer to close the sale			
		5.3	Complete the formalities of the sale following organisational procedures			

Learner name: ______________________________ Date: ____________________

Learner signature: ____________________________ Date: ____________________

Assessor signature: ___________________________ Date: ____________________

Internal verifier signature: _____________________ Date: ____________________
(*if sampled*)

Unit 19: Preparing and Delivering a Sales Demonstration

Unit reference number: T/502/8588

QCF level: 2

Credit value: 3

Guided learning hours: 20

Unit summary

In this unit, you will gain an understanding of how to prepare and deliver a sales demonstration, including how the demonstration will contribute to the achievement of business goals and objectives. You will learn the importance of rehearsing demonstrations and how to demonstrate products and services in a manner and style that is suitable for different audiences.

The unit will enable you to prepare for a sales demonstration, through identifying the sales targets for your own area of responsibility, agreeing the objectives, length, content and method of the demonstration and who will be present, and preparing supporting materials that are consistent with the demonstration.

You will also be able to deliver a sales demonstration, by promoting the features and benefits of the products and/or services, providing the customer/audience with opportunities to ask questions and raise objections and by gaining commitment to progress or close the sale. Finally, you will be able to evaluate the sales demonstration against agreed objectives and provide feedback to colleagues to improve the planning of future demonstrations and/or to enhance products and/or services.

Unit assessment requirements/evidence requirements

This unit must be assessed in line with the Skills CFA Assessment Strategy for 2010 Sales Standards, in *Annexe C*.

Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to prepare and deliver a sales demonstration	1.1	Explain how the demonstration will contribute to the achievement of business goals and objectives			
		1.2	Describe the features and benefits of the products and services being demonstrated			
		1.3	Explain how to provide demonstrations of products and services in a manner and style which is suitable to different audiences			
		1.4	Explain the importance of rehearsing demonstrations			
		1.5.	Describe equipment and accommodation requirements of the demonstration			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to prepare for a sales demonstration	2.1	Identify the sales targets for own area of responsibility			
		2.2	Identify customer needs and wants in relation to the products and/or services being demonstrated			
		2.3	Agree the objectives, length, content and method of the demonstration and who will be present			
		2.4	Identify resources for the demonstration and plan the demonstration in a structured way			
		2.5	Anticipate problems, constraints or objections that could be raised in response to the demonstration and prepare possible responses			
		2.6	Prepare supporting materials that are consistent with the demonstration			
3	Be able to deliver a sales demonstration	3.1	Promote the features and benefits of the products and/or services			
		3.2	Deliver the demonstration in a style and manner that achieves the objectives and engages the audience			
		3.3	Provide the customer/audience with opportunities to ask questions and raise objections			
		3.4	Respond to questions and objections in a manner that is likely to further sales			
		3.5	Gain commitment to progress or close the sale			
4	Be able to evaluate the sales demonstration	4.1	Evaluate the sales demonstration against agreed objectives			
		4.2	Provide feedback to colleagues to improve the planning of future demonstrations and/or to enhance products and/or services			

Learner name: ______________________________ Date: ______________________

Learner signature: ______________________________ Date: ______________________

Assessor signature: ______________________________ Date: ______________________

Internal verifier signature: ______________________________ Date: ______________________
(*if sampled*)

12 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))
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *UK Quality Vocational Assurance Handbook* (Pearson).

All of these publications are available on our website.

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website: qualifications.pearson.com.

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website, qualifications.pearson.com

13 Professional development and training

Professional development and training

Pearson supports UK and international customers with training related to our qualifications. This support is available through a choice of training options offered on our website: qualifications.pearson.com.

The support we offer focuses on a range of issues, such as:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building in effective and efficient quality assurance systems.

The national programme of training we offer is on our website at: qualifications.pearson.com. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

Training and support for the lifetime of the qualifications

Training and networks: our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We also host some regional network events to allow you to share your experiences, ideas and best practice with colleagues in your region.

Regional support: our team of Regional Quality Managers, based around the country, are responsible for providing quality assurance support and guidance to anyone managing and delivering NVQs/Competence-based qualifications. The Regional Quality Managers can support you at all stages of the standard verification process as well as in finding resolutions of actions and recommendations as required.

To get in touch with our dedicated support teams please visit our website at: qualifications.pearson.com

Online support: find the answers to your questions by browsing over 100 FAQs on our website or by submitting a query using our Work Based Learning Ask the Expert Service. You can search the database of commonly asked questions relating to all aspects of our qualifications in the work-based learning market. If you are unable to find the information you need, send us your query and our qualification or administrative experts will get back to you. The Ask the Expert service is available on our website at: qualifications.pearson.com

Online forum

Pearson Work Based Learning Communities is an online forum where employers, further education colleges and workplace training providers can seek advice and clarification about any aspect of our qualifications and services, and share knowledge and information with others. The forums are sector specific and cover business administration, customer service, health and social care, hospitality and catering and retail. The online forum is available on our website at: qualifications.pearson.com

14 Contact us

We have a dedicated Account Support team, across the UK, to give you more personalised support and advice. To contact your Account Specialist:

Email: wblcustomerservices@pearson.com
Telephone: 0844 576 0045

If you are new to Pearson and would like to become an approved centre, please contact us by:

Email: wbl@pearson.com
Telephone: 0844 576 0045

Complaints and feedback

We are working hard to give you excellent service. However, if any element of our service falls below your expectations, we want to understand why, so that we can prevent it from happening again. We will do all that we can to put things right.

If you would like to register a complaint with us, please email wblcomplaints@pearson.com.

We will formally acknowledge your complaint within two working days of receipt and provide a full response within seven working days.

Annexe A: Assessment Strategy (Recruitment)

1 Introduction

1.1 The Recruitment Assessment Strategy is designed to provide awarding organisations with a robust and flexible approach to deliver assessment for Recruitment NVQs/SVQs and competence-based qualifications.

2 External quality control

2.1 Awarding organisations will provide qualifications and quality assurance that support their delivery to all Recruitment NVQs/SVQs and competence-based qualification assessment centres in line with regulatory requirements in England, Scotland, Wales and Northern Ireland.

2.2 Awarding organisations will regularly carry out standard risk assessments in each Recruitment NVQ/SVQ and competence-based qualification assessment centre and manage all identified risks appropriately.

2.3 Awarding organisations will consistently apply external verification processes at all Recruitment NVQ/SVQ and competence-based qualification assessment centres, underpinned by standard risk assessment and risk management processes.

2.4 Awarding organisations will supply the Skills CFA with quarterly reports on:

- Registration and achievement data at qualification level, and unit level where available

3 Assessing performance

3.1 Assessment of all units at any level of Recruitment NVQs/SVQs and competence-based qualifications may be based on either candidate performance at work or through simulation, as necessary (See Section 4 below).

3.2 Units which have been imported by Skills CFA in their Recruitment NVQs/SVQs and competence-based qualifications, will be assessed in compliance with the imported assessment strategies.

4 Simulation of NVQ/SVQ units

4.1 Simulation must not be used, except in exceptional circumstances where natural work evidence is unlikely to occur. Agreement must be gained from the awarding organisation for the use of any simulation. If simulation is used, it should be used sparingly and should only form a small part of the evidence for the qualification.

5 Occupational expertise to assess performance, and moderate and verify assessments

5.1 Candidates work achievements must be assessed, moderated or verified at work by:

a **Assessors, moderators** or **verifiers** who have achieved, or are working towards achievement of, the appropriate regulatory body approved qualifications for assessment, moderation or verification;

OR

b A **trainer**, **supervisor** or **manager**, elected by an employer, who must either:

1 Have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

2 Seek guidance and approval from their awarding organisation to demonstrate that the;

- Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions;
- Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the National Occupational Standards upon which the qualifications above are based. This is known as the employer direct model in Scotland.

5.2 **Assessors** must be occupationally competent to make Recruitment assessment judgements about the level and scope of individual candidate performance at work; and occupationally competent to make assessment judgements about the quality of assessment and the assessment process.

5.3 **External Moderators/Verifiers or Internal Moderators/Verifiers** must be occupationally competent to make Recruitment moderation and verification judgements about the quality of assessment and the assessment process.

5.4 Awarding organisations will supply information on the requirements for internal and external moderation / verification activities to Recruitment assessment centres.

5.5 Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Recruitment competence to deliver these functions. Skills CFA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Recruitment assessment centres.

Annexe B: Assessment strategy (Business Administration, Customer Service and Management and Leadership)

Contents

1 Introduction

This Assessment Strategy provides principles and guidance to Awarding Organisations for the assessment of competence-based units and qualifications (including Scottish Vocational Qualifications and National Vocational Qualifications) within Business Administration, Customer Service and Management and Leadership in England, Scotland, Wales and Northern Ireland.

This document outlines Skills CFA principles in regards to:

- external quality control of assessment
- requirements of assessor and verifiers
- evidence
- employer direct model.

These principles are in addition to the generic criteria that Awarding Organisations must meet for delivery of qualifications as required by the qualification regulators, for example Ofqual's Regulatory Arrangements for the Qualifications and Credit Framework and any regulatory requirements specified by the SQA Accreditation.

This strategy should only be used for the assessment of the Business Administration, Customer Service and Management and Leadership competence-knowledge based units and qualifications owned by Skills CFA. Units which have been imported by Skills CFA into their apprenticeships or competence-based qualifications will be assessed in compliance with their relevant assessment strategies. Awarding Organisations may assess knowledge-only units as they see fit.

2 External quality control of assessment

The quality of the assessment process is the responsibility of Awarding Organisations. However, Skills CFA encourages flexibility and innovation of approach, alongside robust systems to support quality control. Awarding Organisations are also encouraged to detail their approach to external verification, risk assessment and data requests.

2.1 External verification

- Awarding Organisations are responsible for the competence of external verifiers. It is the responsibility of Awarding Organisations to monitor centres' performance in accordance with regulatory requirements.
- Awarding Organisations must consistently apply external verification processes at all assessment centres delivering competence-based qualifications. These should be underpinned by standard risk assessment and risk management processes.

2.2 Risk assessment

- Awarding Organisations must carry out standard risk assessments for all qualification assessment centres that are delivering competence-based qualifications. Identified risks must be managed appropriately.
- Awarding Organisations must retain evidence to prove that a risk assessment has been carried out for each approved centre, and that a strategy to minimise any identified risk has been implemented.

2.3 Data requests

- Each quarter, Awarding Organisations must provide registration and achievement data at all qualification levels and unit levels (where possible) to Skills CFA.

3 Requirements of assessors, external and internal verifiers

Candidates may be assessed, moderated or verified at work either by several appointed individuals.

3.1 Assessors

The primary responsibility of an Assessor is to assess candidates' performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria.

It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates.

To be able to assess candidates, Assessors must:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. An Assessor working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period.
- be "occupationally competent" Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed.
- have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process.

It is the responsibility of approved centres to select and appoint assessors.

3.2 External quality assurer (EQA)[1]

The primary responsibility of EQAs is to assure quality of internal verification and assessments across the centres for which they are responsible. EQAs must have a thorough understanding of quality assurance and assessment practices, as well as in-depth technical knowledge related to the qualifications that they are externally verifying.

EQAs must:

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA[2] and should be supported by a qualified EQA throughout their training period.
- be "occupationally competent". EQAs must demonstrate sufficient and current understanding of the qualifications to be verified, and know how they are applied in business.
- demonstrate competent practice in external verification of assessment, and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process.

It is the responsibility of the awarding body to select and appoint EQAs.

[1] Also known as External Verifier (EV)
[2] The need for countersigning the decisions of EQAs working towards a qualification, applies to England and Wales and not Scotland.

3.3 Internal quality assurer (IQA)3

A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQAs.

IQAs must:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA[4] and should be supported by a qualified IQA throughout their training period.
- be "occupationally competent". IQAs must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business.
- demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process.

Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Business Administration, Customer Service and Management and Leadership competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual CPD records that are maintained in assessment centres.

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[3] Also known as Internal Verifier (IV)
[4] The need for countersigning the decisions of IQAs working towards a qualification, applies to England and Wales and not Scotland.

4 Evidence

4.1 Evidence from Workplace Performance

- Evidence of occupational competence of all competence units at any level, should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria of the competence units.
- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

4.2 Simulation

- Simulation can be applied to all units listed in Section 7.
- Where simulation is used for units at Level 2 and above, it should only form a small part of the evidence for the qualification.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- Simulation must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in Section 6.

5 Employer direct model

Skills CFA encourages the use of an employer direct model. The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of their Awarding Organisation may choose between:

- Achieving the appropriate regulatory body approved unit qualifications for assessment;

OR

- Demonstrating that the employer's training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by the Awarding Organisation as providing the equivalent level of rigour and robustness as achievement of the unit qualification

In order to use the employer direct model:

- **An organisation must**:
  - have staff who have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification; **OR**
  - seek guidance and approval from an awarding organisation to demonstrate that they have:
    - appropriate processes in place to facilitate assessment, moderation or verification functions
    - carried out 100% mapping of the trainer, supervisor or managers' assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.
- **An Awarding Organisation must**:
  - offer this model to employers only
  - supply information on the requirements for internal and external moderation/verification activities to assessment centres.

6 Realistic Working Environment Guidelines

Realistic Working Environment (RWE) can be applied to all the units Section 7:

It is essential that organisations wishing to operate a RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE the following guidelines must be met:

1. the RWE is managed as a real work situation
2. assessment must be carried out under realistic business pressures
3. all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations
4. candidates must be expected to achieve a volume of work comparable to normal business practices
5. the range of services, products, tools, materials and equipment that the candidates use must be up to date and available
6. account must be taken of any legislation or regulations in relation to the type of work that is being carried out
7. candidates must be given workplace responsibilities to enable them to meet the requirements of the units
8. customer perceptions of the RWE is similar to that found in the work situation being represented
9. candidates must show that their productivity reflects those found in the work situation being represented.

7 Simulation: a list of units

Simulation can only be applied to the following competence units:

Business Administration

Skills CFA Ref.	Unit title	Level
B&A 3	Work with others in a business environment	1
B&A 4	Health and safety in a business environment	1
B&A 5	Manage time and workload	1
B&A 6	Use a telephone and voicemail system	1
B&A 7	Prepare text from notes	1
B&A 8	Meet and welcome visitors in a business environment	1
B&A 9	Handle mail	1
B&A 10	Use office equipment	1

Customer Service

Skills CFA Ref.	Unit title	Level
CS 2	Communication in customer service	1
CS 3	Record details of customer service problems	1
CS 4	Deal with customer queries, requests and problems	1

Management and Leadership

Skills CFA Ref.	Unit title	Level
M&L 17	Manage conflict within a team	3
M&L 31	Discipline and grievance management	4
M&L 44	Manage redundancy and redeployment	4

Annexe C: Assessment Strategy for Sales (2010 Sales Standards (updated January 2013))

Contents

1 Introduction

1.1 The Sales Assessment Strategy is designed to provide awarding organisations with a robust and flexible approach to deliver assessment for Sales NVQs / SVQs and competence-based qualifications.

2 External quality control

2.1 Awarding organisations will provide qualifications and quality assurance that support their delivery to all Sales NVQs / SVQs and competence-based qualification assessment centres in line with regulatory requirements in England, Scotland, Wales and Northern Ireland.

2.2 Awarding organisations/bodies will carry out standard risk assessments in each Sales NVQ / SVQ and competence based qualification assessment centre and manage all identified risks appropriately

2.3 Awarding organisations/bodies will consistently apply external verification processes at all Sales NVQ / SVQ and competence based qualification assessment centres, underpinned by standard risk assessment and risk management processes.

2.4 Awarding organisations/bodies will supply Skills CFA with reports:

Quarterly: provide registration and achievement data at qualification levels and unit level where possible.

3 Assessing performance

3.1 Assessment of all units at any level of Sales NVQs / SVQs and competence-based qualifications may be based on either candidate performance at work or through simulation, as necessary (See Section 4 below).

3.2 Units which have been imported by the CFA in their Sales NVQs / SVQs and competence- based qualifications will be assessed in compliance with their relevant assessment strategies.

4 Simulation of NVQ/SVQ units

4.1 If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE).

4.2 Awarding organisations will provide guidance for centres on RWEs. Awarding organisations will make sure RWEs, "provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed".

5 Occupational expertise to assess performance, and moderate and verify assessments

5.1 Candidates must be assessed, moderated or verified at work either by:

a **Assessors**, **moderators** or **verifiers** who have achieved or are working towards achievement of the appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

b A **trainer**, **supervisor** or **manager**, employed by an organisation, who must either:

1 Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; or,

2 Seek guidance and approval from an awarding organisation to demonstrate that the;

- Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
- Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based, and the A and V units. This is known as the employer direct model in Scotland.

5.2 Assessors must be occupationally competent to make Sales assessment judgements about the level and scope of individual candidate performance at work or in RWEs; and, occupationally competent to make assessment judgements about the quality of assessment and the assessment process.

5.3 External Moderators/Verifiers or Internal Moderators/Verifiers must be occupationally competent to make Sales moderation and verification judgements about the quality of assessment and the assessment process.

5.4 Awarding organisations will supply information on the requirements for internal and external moderation/verification activities to Sales assessment centres.

5.5 The sector requires all assessors, moderators and verifiers to maintain current Sales competence to deliver these functions. The CFA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Sales assessment centres.

Annexe D: Personal, Learning and Thinking Skills mapping

PLTS / Units	1 L2	2 L2	3 L2	4 L2	5 L2	6 L2	7 L2	8 L2	9 L2
Independent Enquirers									
1 identify questions to answer and problems to resolve	•		•				•		•
2 plan and carry out research, appreciating the consequences of decisions				•					•
3 explore issues, events or problems from different perspectives			•				•	•	
4 analyse and evaluate information, judging its relevance and value	•	•				•			•
5 consider the influence of circumstances, beliefs and feelings on decisions and events	•						•		
6 support conclusions, using reasoned arguments and evidence	•					•	•	•	
Creative Thinkers									
1 generate ideas and explore possibilities		•			•	•	•	•	
2 ask questions to extend their thinking		•					•		
3 connect their own and others' ideas and experiences in inventive ways				•			•	•	
4 question their own and others' assumptions							•		
5 try out alternatives or new solutions and follow ideas through				•	•		•		
6 adapt ideas as circumstances change				•	•		•		
Reflective Learners									
1 assess themselves and others, identifying opportunities and achievements	•								
2 set goals with success criteria for their development and work									
3 review progress, acting on the outcomes									
4 invite feedback and deal positively with praise, setbacks and criticism							•		
5 evaluate experiences and learning to inform future progress							•		
6 communicate their learning in relevant ways for different audiences									

PLTS / Units	1 L2	2 L2	3 L2	4 L2	5 L2	6 L2	7 L2	8 L2	9 L2
Team Workers									
1 collaborate with others to work towards common goals							•	•	
2 reach agreements, managing discussions to achieve results							•	•	•
3 adapt behaviour to suit different roles and situations, including leadership roles							•	•	
4 show fairness and consideration to others	•				•		•	•	
5 take responsibility, showing confidence in themselves and their contribution								•	
6 provide constructive support and feedback to others	•				•		•	•	
Self-Managers									
1 seek out challenges or new responsibilities and show flexibility when priorities change							•		
2 work towards goals, showing initiative, commitment and perseverance				•			•		
3 organise time and resources, prioritising actions	•		•		•				•
4 anticipate, take and manage risks			•	•			•		
5 deal with competing pressures, including personal and work-related demands	•								
6 respond positively to change, seeking advice and support when needed							•	•	
7 manage their emotions, and build and maintain relationships	•						•		
Effective Participators									
1 discuss issues of concern, seeking resolution where needed			•				•	•	
2 present a persuasive case for action	•		•			•	•	•	
3 propose practical ways forward, breaking these down into manageable steps			•		•			•	•
4 identify improvements that would benefit others as well as themselves							•	•	
5 try to influence others, negotiating and balancing diverse views to reach workable solutions				•				•	
6 act as an advocate for views and beliefs that may differ from their own							•	•	

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May 2015

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