Pearson
Edexcel Level 4 NVQ Diploma in Recruitment

Specification

NVQ qualification

First registration May 2015

Issue 2

Edexcel, BTEC and LCCI qualifications

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

This qualification was previously known as:

Pearson Edexcel Level 4 NVQ Diploma in Recruitment (QCF)

The QN remains the same.

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

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

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Summary of Pearson Edexcel Level 4 NVQ Diploma in Recruitment Issue 2 changes

Summary of changes made between previous Issue 1 and this current Issue 2	Page/section number
All references to QCF have been removed throughout the specification	Throughout
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
TQT value added	Section 2
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	Section 2
Reference to credit transfer within the QCF removed	Section 5
QCF references removed from unit titles and unit levels in all units	Section 11
Guided learning definition updated	Section 11

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

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

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 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 Pearson Edexcel NVQ qualifications

What are NVQ qualifications?

National Vocational Qualifications (NVQs) qualifications 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 strategy for the sector. Colleges, training centres and/or employers can offer these qualifications provided they have access to appropriate physical and human resources.

Sizes of NVQ/Competence-based qualifications

For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

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

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

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

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

NVQ/Competence-based qualifications are available in the following sizes:

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

2 Qualification summary and key information

Qualification title	Pearson Edexcel Level 4 NVQ Diploma in Recruitment
Qualification Number (QN)	601/5877/3
Regulation start date	18/05/2015
Operational start date	01/05/2015
Approved age ranges	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 strategy
Credit value	63
Assessment	Portfolio of Evidence (internal assessment)
Total Qualification Time (TQT)	630
Guided learning hours	318
Grading information	The qualification and units are graded pass/fail
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification, however it is anticipated that learners will have relevant experience of working in a recruitment services role. Centres must also follow the Pearson *Access and Recruitment* policy (see *Section 7*, *Access and Recruitment*).
Funding	Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding. 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 Qualification Number (QN) when they seek public funding for their learners. As well as a QN, each unit within a qualification has a 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 4 NVQ Diploma in Recruitment is for learners who work in, or who want to work in recruitment in roles such as:

Recruitment consultant	Senior/Principal/Lead Consultant
Account Manager	

The qualification gives learners the opportunity to:

- develop the specific skills needed to underpin the competence in the job roles mentioned above. This includes identifying client recruitment requirements, which covers confirming the clients' staffing requirements, analysing the role requirements of staff that the client is seeking and confirming recruitment arrangements with clients; carrying out candidate debriefing, which covers reviewing candidates progress and exchanging feedback with them and coaching and supporting candidates, which includes establishing candidates' needs, supporting candidates and coaching candidates
- develop a broad understanding of the skills, knowledge and experience needed to progress to roles with additional responsibility such as line management or managing a department
- have existing skills recognised
- achieve a nationally-recognised Level 4 qualification
- develop their own personal growth and engagement in learning.

Relationship with previous qualifications

This qualification is not a replacement. It is a new qualification.

Apprenticeships

Skills CFA, the Sector Skills Council for pan-sector business skills which includes recruitment, includes the Pearson Edexcel Level 4 NVQ Diploma in Recruitment as the competencies component for the Higher Apprenticeship in Recruitment.

Progression opportunities

Learners who achieve the Pearson Edexcel Level 4 NVQ Diploma in Recruitment can progress to the:

- Pearson BTEC Level 4 Diploma in Recruitment Management – knowledge component for the Higher Apprenticeship in Recruitment
- Pearson Edexcel Level 4 NVQ Diploma in Management – competencies component of the Higher Apprenticeship in Management
- Pearson BTEC Level 4 Diploma in Management – knowledge component for the Higher Apprenticeship in Management
- Pearson BTEC Level 5 Award in Management and Leadership
- Pearson BTEC Level 5 Certificate in Management and Leadership
- Pearson BTEC Level 5 Diploma in Management and Leadership – knowledge component for the Higher Apprenticeship in Leadership and Management
- Pearson Edexcel Level 5 NVQ Diploma in Management and Leadership – competencies component of the Higher Apprenticeship in Leadership and Management
- Job roles such as manager and senior manager

Industry support and recognition

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

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 4 NVQ Diploma in Recruitment

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	63
Minimum number of credits that must be achieved at Level 4 or above	33
Number of mandatory credits that must be achieved	53
Number of optional credits that must be achieved	10

Unit	Unit reference number	Group A – Mandatory units	Level	Credit	Guided learning hours
1	A/504/6963	Develop Resourcing Plan for Recruitment Services	3	4	15
2	T/504/6962	Identify Client Recruitment Requirements	3	3	10
3	A/504/6977	Carry Out Candidate Debriefing	3	4	20
4	F/504/6964	Pre-Select Candidates	3	3	10
5	J/504/6965	Carry Out Candidate Assessment	4	4	20
6	M/504/6975	Coach and Support Candidates	4	5	30
7	R/504/6967	Match and Present Candidates to Employers	3	4	30
8	R/504/6970	Market for Potential Candidates	4	4	15
9	Y/504/6968	Build and Sustain Strategic Relationships with Clients	4	6	30
10	M/600/9791	Analyse the Market in which your Organisation Operates	4	5	25
11	K/502/8622	Buyer Behaviour in Sales Situations	3	3	27
12	F/502/8612	Negotiating, Handling Objections and Closing Sales	3	4	22
13	R/600/9587	Develop, Maintain and Review Personal Networks	4	4	25

Unit	Unit reference number	Group B – Optional units	Level	Credit	Guided learning hours
14	K/504/6960	Advise Clients on Strategic Recruitment Planning	4	5	20
15	J/504/6979	Co-Ordinate Flexible Workers	3	6	40
16	H/502/9929	Conduct Market Research	3	6	10
17	M/502/8654	Monitoring and Managing Sales Team Performance	4	5	32
18	A/502/8656	Developing Sales Proposals	4	5	30
19	T/601/2580	Manage Budgets	4	5	29
20	L/502/8631	Preparing and Delivering a Sales Presentation	3	4	28

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 include:

- 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 include:

- 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.
- 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 include:

- 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* and *Annexe B*. 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

Learners who are looking to undertake the Pearson Edexcel Level 4 NVQ Diploma in Recruitment are expected to have relevant experience of working in a recruitment role to ensure they have the foundations on which to further develop their knowledge and skills.

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.

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.

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 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.
- a combination of these.

Assessment strategy

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

Imported units in this qualification are governed by the Assessment Strategy in *Annexe B*. The unit assessment requirements section in each unit states where these strategies apply.

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 strategy given in *Annexe A* and *Annexe B*.

In line with the assessment 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)
- 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. 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.

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.

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.

9 Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson 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 Pearson 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.

11 Unit format

Each unit has the following sections.

Unit title

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

Unit reference number

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

Level

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

Credit value

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

Unit 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: Develop Resourcing Plan for Recruitment Services

Unit reference number: A/504/6963

Level: 3

Credit value: 4

Guided learning hours: 15

Unit summary

In this unit, you will learn how to agree with clients how recruitment needs will be met, including clarifying the client's recruitment and selection preferences and/or processes, recommending the optimum methods of recruitment and selection for a range of roles and advising the client on any potential adverse effects associated with recruitment methods.

You will also learn how to develop a recruitment resourcing plan, including ensuring the plan includes SMART objectives, a candidate attraction plan, application methods, circulation arrangements, quality standards, resource allocations, contingencies, success criteria, validation processes and evaluation mechanisms.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Agree with clients how recruitment needs will be met	1.1	Clarify the client's recruitment and selection preferences and/or processes			
		1.2	Recommend the optimum method(s) of recruitment and selection for a range of roles			
		1.3	Advise the client on any potential adverse effect associated with recruitment methods			
		1.4	Ensure all recruitment policies, materials and processes meet legal and ethical requirements			
2	Develop a recruitment resourcing plan	2.1	Ensure the plan includes SMART objectives, candidate attraction plan, application method(s), circulation arrangements, quality standards, resource allocations, contingencies, success criteria, validation processes and evaluation mechanisms			
		2.2	Ensure the plan specifies the chosen recruitment and selection method(s) and is achievable within 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 2: Identify Client Recruitment Requirements

Unit reference number: T/504/6962

Level: 3

Credit value: 3

Guided learning hours: 10

Unit summary

In this unit, you will learn how to confirm clients' staffing requirements, by establishing the numbers of people needed in each role, establishing the client's policies and requirements for experience, skills, qualifications and attributes, and clarifying the contractual terms of the staff sought by the clients.

You will also learn how to analyse the role requirements of the staff sought, including identifying the requirements of the roles using valid sources of information and recording role profiles, job descriptions, person specifications and vacancy details.

Finally, you will learn how to confirm recruitment arrangements with clients, by confirming the services to be offered, confirming terms of business and timescales, and ensuring that arrangements meet legal and ethical requirements.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Confirm clients' staffing requirements	1.1	Establish the numbers of people needed in which roles			
		1.2	Establish the client's policies and requirements for experience, skills, qualifications, attributes and any other relevant candidate requirements			
		1.3	Clarify the contractual terms of the staff sought by the clients			
2	Analyse the role requirements of staff sought	2.1	Explain the purpose, methods and suitability of different methods of job analysis			
		2.2	Identify the requirements of the roles using valid sources of information			
		2.3	Record role profiles, job descriptions, person specifications and/or vacancy details in the agreed format(s)			
		2.4	Explain the distinctions between role profiles, job descriptions and person specifications and the information needed for each			
3	Confirm recruitment arrangements with clients	3.1	Confirm the services to be offered			
		3.2	Confirm terms of business and timescales			
		3.3	Ensure that agreements meet legal and ethical requirements			

Learner name: ____ Date: ____________________________

Learner signature: ____ Date: ____________________________

Assessor signature: ____ Date: ____________________________

Internal verifier signature: ___________________________________ Date: ____________________________
(*if sampled*)

Unit 3: Carry Out Candidate Debriefing

Unit reference number: A/504/6977

Level: 3

Credit value: 4

Guided learning hours: 20

Unit summary

In this unit, you will learn how to review candidates' progress, including keeping candidate records and the database of their job-search related activities up to date, reviewing the effectiveness of agreed action plans at agreed intervals and using information from a range of sources to enhance the understanding of candidates' needs and expectations.

You will also learn how to exchange feedback with candidates by providing timely feedback that is constructive, accurate, sensitive and evidence-based, giving candidates' feedback at all stages of the job-search programme, optimising the personal and business brand through productive relationships with candidates and ensuring that candidates' expectations are realistic, explaining why some may be unachievable.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Review candidates' progress	1.1	Keep candidate records and the database of their job search-related activities up to date			
		1.2	Review the effectiveness of agreed action plans at agreed intervals and adapt them in the light of changing circumstances			
		1.3	Use information from a range of sources to add to the understanding of candidates' needs and expectations			
2	Exchange feedback with candidates	2.1	Provide timely feedback that is constructive, accurate, sensitive and evidence-based			
		2.2	Give candidates feedback at all stages of the job search programme			
		2.3	Optimise the personal and business brand through productive relationships with candidates			
		2.4	Ensure the realism of candidates' expectations, explaining why some may be unachievable			
		2.5	Ensure all recruitment policies and advice given meet legal and ethical requirements			

Learner name: ______________________________ Date: ______________________

Learner signature: ______________________________ Date: ______________________

Assessor signature: ______________________________ Date: ______________________

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

Unit 4: Pre-Select Candidates

Unit reference number: F/504/6964

Level: 3

Credit value: 3

Guided learning hours: 10

Unit summary

In this unit, you will learn how to shortlist candidates, including assessing candidates against the agreed criteria, identifying any candidates who do not meet the criteria but who offer a potentially valuable alternative and confirm the interest, identity, suitability and availability of pre-selected candidates.

You will also learn how to present pre-selected candidates to clients by presenting shortlisted candidates to clients in the agreed format and timescale, promoting the shortlisted candidates, explaining how they meet the client's requirements and agreeing with the client which candidates they will consider.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Shortlist candidates	1.1	Assess candidates against the agreed criteria			
		1.2	Identify any attractive prospects who do not meet the criteria but who offer potentially valuable alternatives			
		1.3	Inform those who are not pre-selected of the outcome in accordance with organisational standards and procedures			
		1.4	Confirm the interest, identity, suitability and availability of those pre-selected			
		1.5	Ensure all pre-selection processes meet legal and ethical requirements			
2	Present pre-selected candidates to clients	2.1	Present shortlisted candidates to clients in the agreed format and timescale			
		2.2	Promote the shortlisted candidates, explaining how they meet the client's requirements			
		2.3	Agree with the client which candidates they will consider			

Learner name: ____ Date: ____________________________

Learner signature: ____ Date: ____________________________

Assessor signature: ____ Date: ____________________________

Internal verifier signature: ____________________________________ Date: ____________________________
(*if sampled*)

Unit 5: Carry Out Candidate Assessment

Unit reference number: J/504/6965

Level: 4

Credit value: 4

Guided learning hours: 20

Unit summary

In this unit, you will learn how to plan for candidate assessments by specifying the objectives of the assessment processes, assembling the resources needed for the assessment process, planning the structure, validity and reliability of the assessment, briefing those making assessments, and inviting candidates to carry out the assessment processes in accordance with organisational standards and procedures.

You will also learn how to conduct candidate assessments by carrying out assessments in accordance with the resourcing plan, job and personal specification, making assessments that are objective and evidence-based, recording the outcomes of the assessment and informing candidates of the next steps and/or results in the process.

Finally, you will understand the basis for choosing selection methods and media, including explaining the features, requirements, advantages and disadvantages of a range of selection methods and explaining why some selection methods are better suited to some roles than others.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Plan for candidate assessments	1.1	Specify the objectives of the assessment process(es)			
		1.2	Assemble the resources needed for the assessment process			
		1.3	Plan the structure, validity and reliability of the assessment and brief those making assessments			
		1.4	Invite candidates to carry out the assessment process(es) in accordance with organisational standards and procedures			
2	Conduct candidate assessments	2.1	Carry out assessments in accordance with the resourcing plan, job and personal specification and good industry practice in the use of assessment techniques			
		2.2	Make assessments that are objective and evidence-based			
		2.3	Record the outcomes of the assessment in accordance with organisational standards and procedures			
		2.4	Inform candidates of the next step(s) and/or results in the process in accordance with organisational standards and procedures			
		2.5	Ensure the assessment process(es) meet legal and ethical requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Understand the basis for choosing selection methods and media	3.1	Explain the features, requirements, advantages and disadvantages of a range of selection methods (pre-selection, interviewing (biographical and competence assessment), assessment centres, psychometric testing)			
		3.2	Explain why some selection methods are better suited to some roles than others			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

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

Unit 6: Coach and Support Candidates

Unit reference number: M/504/6975

Level: 4

Credit value: 5

Guided learning hours: 30

Unit summary

In this unit, you will learn how to establish candidates' needs by identifying the nature of their immediate wishes and long-term aspirations, agreeing expectations, communications, availability, flexibilities and action plans and recording agreements and needs.

You will also learn how to support candidates by taking steps to find suitable job and career opportunities for them, promoting candidates to employers, and negotiating on their behalf.

Finally, you will learn how to coach candidates by briefing them on employers' requirements and preferences, agreeing actions that will enhance candidates' employability and giving them constructive and sensitive feedback on their strengths, areas for development and job-search performance.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Establish candidates' needs	1.1	Identify the nature of candidates' immediate needs and long term aspirations			
		1.2	Agree expectations, communications, availability, flexibilities and action plans			
		1.3	Record agreements and needs in accordance with organisational procedures			
2	Support candidates	2.1	Take steps to find suitable job and career opportunities for candidates			
		2.2	Promote candidates to employers for suitable positions			
		2.3	Refer candidates to sources of specialist help that are likely to enhance their employability			
		2.4	Negotiate on behalf of candidates to optimum effect (e.g. terms, dates, counter offers)			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Coach candidates	3.1	Brief candidates on employers' requirements and preferences			
		3.2	Agree targeted, specific programmes of support that are tailored to candidates' identified needs and aspirations			
		3.3	Agree actions (e.g. research, interview practice, changes to personal presentation) that will enhance candidates' employability			
		3.4	Provide suitable support to help candidates meet their objectives			
		3.5	Provide constructive and sensitive feedback to candidates on their strengths, areas for development and job-search performance			
		3.6	Ensure all recruitment policies, materials and processes meet legal and ethical requirements			

Learner name: ______________________________ Date: ____________________

Learner signature: ___________________________ Date: ____________________

Assessor signature: __________________________ Date: ____________________

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

Unit 7: Match and Present Candidates to Employers

Unit reference number: R/504/6967

Level: 3

Credit value: 4

Guided learning hours: 30

Unit summary

In this unit, you will learn how to manage the process of matching and presenting candidates to employers, to ensure the most suitable people are appointed. Labour is both an expensive and valuable resource and therefore it is important to ensure that staff of the right calibre with suitable experience and expertise are presented to employers.

You will learn the importance of developing and maintaining a candidate database, including ensuring you obtain sufficient and relevant information about candidates. You will also learn how to match candidates, including identifying suitable job opportunities that meet candidates' specifications, ensuring candidates meet client specifications, and promoting suitable candidates to clients and clients to candidates.

Finally, you will learn how to present candidates to clients, including how to promote shortlisted candidates, agreeing with the client which candidates will be accepted, providing constructive feedback to candidates, and ensuring all recruitment policies, materials and processes meet legal and ethical requirements.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Develop and maintain a candidate database	1.1	Agree the criteria by which candidates will be included on the candidate database			
		1.2	Obtain sufficient relevant information about candidates to enable matching to take place			
		1.3	Keep the candidate database up to date			
2	Match candidates	2.1	Identify potentially suitable job opportunities that meet candidates' specifications and candidates who meet client specifications			
		2.2	Promote suitable candidates to clients and suitable clients to candidates			
		2.3	Inform candidates of the nature and details of the selection assessment			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Present candidates to clients	3.1	Present candidates to clients in the agreed format and timescale			
		3.2	Promote shortlisted candidates, explaining how they meet the client's requirements			
		3.3	Agree with the client which candidates will be accepted			
		3.4	Record placements and carry out associated administrative and financial actions in accordance with organisational procedures			
		3.5	Provide constructive feedback to candidates on the results of the submission and assessment			
		3.6	Use feedback to make improvements to the recruitment process			
		3.7	Ensure all recruitment policies, materials and processes meet legal and ethical requirements			

Learner name: ______________________________ Date: ____________________

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Assessor signature: __________________________ Date: ____________________

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

Unit 8: Market for Potential Candidates

Unit reference number: R/504/6970

Level: 4

Credit value: 4

Guided learning hours: 15

Unit summary

In this unit, you will learn how to plan a candidate attraction campaign, including developing an implementation plan and selecting marketing methods and media that are likely to reach the desired candidate groups. You will also learn how to write job advertisements, including using the principles of effective job advertisement design, analysing the suitability of different newspapers and publications and ensuring all recruitment advertising, materials and processes meet legal and ethical requirements.

You will learn how to implement a candidate attraction campaign, including delivering the plan within budget and timescale, keeping stakeholders up to date with progress, development and issues, and recording and reporting on the outcomes of the implementation.

Finally, you will learn how to build constructive relationships with potential candidates, including using client network opportunities to promote the candidate, applying customer service techniques in building productive relationships, and assessing the importance of managing candidates' expectations.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Plan a candidate attraction campaign	1.1	Analyse the efficiency and cost-effectiveness of a range of sources that are likely to reach potential candidates (networking, social media, job adverts, online searches, e-recruitment, consultancies)			
		1.2	Develop an implementation plan that specifies objectives, actions, responsibilities, budget, timescale and success criteria			
		1.3	Select marketing methods and media that are likely to reach the desired candidate group(s)			
2	Write job advertisements	2.1	Create job advertisements using the principles of effective job advertisement design (Attention, Desire, Interest, Action (AIDA)) that capture all the required information using relevant and accurate information sources			
		2.2	Analyse the suitability of different newspapers and publications for reaching the type and quantity of desirable candidates			
		2.3	Ensure all recruitment advertising, materials and processes meet legal and ethical requirements			
3	Implement candidate attraction campaign	3.1	Deliver the plan within budget and timescale			
		3.2	Address risks, problems and variances from expectations in accordance with the plan			
		3.3	Keep stakeholders up to date with progress, developments and issues			
		3.4	Record and report on the outcomes of the implementation in accordance with the plan and organisational procedures			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Build consultative relationships with potential candidates	4.1	Qualify candidates in accordance with organisational standards and procedures			
		4.2	Make recommendations and provide advice that would enhance candidates' employability and career prospects			
		4.3	Use client network opportunities to promote the candidate for suitable positions			
		4.4	Apply customer service techniques in building productive relationships with potential candidates			
		4.5	Assess the importance of managing candidates' expectations			
		4.6	Record all contact with and information about candidates that is likely to add to understanding about candidates and clients			

Learner name: ______________________________ Date: ____________________

Learner signature: ___________________________ Date: ____________________

Assessor signature: __________________________ Date: ____________________

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

Unit 9: Build and Sustain Strategic Relationships with Clients

Unit reference number: Y/504/6968

Level: 4

Credit value: 6

Guided learning hours: 30

Unit summary

In this unit, you will learn how to use networking tools to create strategic relationships in recruitment, including analysing the characteristics of productive recruitment networks, and analysing methods of enhancing and using a personal 'brand'. You will also learn how to develop strategic relationships with clients in recruitment, including classifying the nature of different kinds of recruitment relationships and developing a rapport and trust with the client.

Finally, you will learn how to sustain strategic relationships with clients in recruitment, including assessing the value of loyalty in recruitment business relationships, analysing the concept and use of account management in recruitment and creating opportunities to maintain productive contact with recruitment clients.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Use networking tools to create strategic relationships in recruitment	1.1	Analyse the characteristics of productive recruitment networks			
		1.2	Maximise the opportunities provided by different social media for recruitment networking and marketing purposes (e.g. Facebook, blogs)			
		1.3	Analyse methods of enhancing and using a personal 'brand'			
2	Develop strategic relationships with clients in recruitment	2.1	Classify the nature of different kinds of recruitment relationship (existing, lapsed, potential)			
		2.2	Explain the client's needs, preferences, priorities, policies and problems as they relate to recruitment			
		2.3	Develop rapport and trust with the client, offering mutually acceptable benefits of collaboration			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Sustain strategic relationships with clients in recruitment	3.1	Analyse the significance of identifying, monitoring, managing and exceeding client expectations			
		3.2	Assess the value of loyalty in recruitment business relationships			
		3.3	Analyse the concept and use of account management in recruitment			
		3.4	Create opportunities to maintain productive contact with recruitment clients			
		3.5	Evaluate how the conduct of business contributes to sustaining relationships (e.g. client satisfaction surveys, Service Level Agreements, business reviews, performance and efficiency indicators)			
		3.6	Ensure all activities and records meet legal and ethical requirements			

Learner name: ______________________________ Date: ______________________

Learner signature: ___________________________ Date: ______________________

Assessor signature: __________________________ Date: ______________________

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

Unit 10: Analyse the Market in which your Organisation Operates

Unit reference number: M/600/9791

Level: 4

Credit value: 5

Guided learning hours: 25

Unit summary

In this unit, you will learn how to analyse customer needs by assessing the economic environment, evaluating customer needs and analysing customer perception of products and services in comparison to competitors.

You will also learn how to analyse the market using research tools and techniques, including analysing current and future macro and micro economic trends and using recognised research tools to assess market trends and opportunities for growth.

Finally, you will learn how to communicate research findings to inform managerial decisions. You will produce a report based on research findings, communicate the report to key individuals, evaluate feedback from key individuals, and revise and communicate an updated report.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 analyse customers' needs	1.1	Assess the economic environment in which your organisation operates			
		1.2	Evaluate your customers' needs and relate to own organisation			
		1.3	Analyse customer perception of own products/services in comparison to competitors			
2	Be able to analyse the market using research tools and techniques	2.1	Identify and utilise market research specialists if necessary			
		2.2	Analyse current and future macro and micro economic trends in own sector			
		2.3	Use recognised research tools to assess market trends and opportunities for growth			
3	Be able to communicate research findings to inform managerial decisions	3.1	Produce a report based on research findings			
		3.2	Communicate the report to key individuals within own organisation			
		3.3	Evaluate feedback from key individuals			
		3.4	Revise and communicate updated report to key individuals			
		3.5	Monitor the economic environment and changes in customers' needs			

Learner name: ____ Date: ____________________________

Learner signature: ____ Date: ____________________________

Assessor signature: ____ Date: ____________________________

Internal verifier signature: ____________________________________ Date: ____________________________
(*if sampled*)

Unit 11: Buyer Behaviour in Sales Situations

Unit reference number: K/502/8622

Level: 3

Credit value: 3

Guided learning hours: 27

Unit summary

In this unit, you will learn how to deal with buyer behaviour in sales situations. This will give you the knowledge to be able to apply your skills to different sales environments, situations and customers. You will do this by learning different models of buyer behaviour, the impact of these different models on the sales cycle, and how to respond to the buyer at each stage of the decision-making process. You will need to know what influences consumers when making decisions and how organisational processes affect the sales cycle.

You will need to show competence when contacting customers, decision makers and influencers within the decision-making cycle, and respond to these people in a sales situation. Finally, you will need to show competence using objections as buying opportunities and confirm solutions with your customers.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Sales in *Annexe B*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 impact of different models of buyer behaviour on the sales cycle	1.1	Explain the consumer buying decision-making process			
		1.2	Explain how the consumer buying decision-making process affects the sales cycle			
		1.3	Describe the influences that affect the consumer decision-making process			
		1.4	Explain the organisational buying decision-making process			
		1.5	Explain how the organisational buying decision-making process affects the sales cycle			
		1.6	Describe the influences that affect the organisational buying decision-making process			
		1.7	Explain the impact of the different roles within the decision-making unit on the sales cycle			
2	Be able to respond to the buyer at each stage of the decision making process	2.1	Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process			
		2.2	Respond to different decision-makers in a sales situation in a way that is appropriate to their role			
		2.3	Use objections as buying opportunities			
		2.4	Confirm solution(s) offered meet the needs and wants of decision-makers			

Learner name: ______________________________________ Date: ______________________

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(*if sampled*)

Unit 12: Negotiating, Handling Objections and Closing Sales

Unit reference number: F/502/8612

Level: 3

Credit value: 4

Guided learning hours: 22

Unit summary

The ability to negotiate, handle objections and close sales is important within some customer service roles. Each must be done correctly and effectively in order to provide customer satisfaction, meet the needs and expectations of the customer and present a favourable image of the organisation.

In this unit, you will learn how to negotiate, handle and overcome objections in order to close sales transactions effectively, in a way that is beneficial to both your customer and your organisation.

You will understand the limits of your own authority and responsibility when dealing with objections and the resources needed to be able to counter sales objections.

You will learn how to plan and prepare for negotiations, and use testimonials to progress a sale. You will learn about the advantages and disadvantages of different methods that can be used to close a sale, and your own organisation's procedures for documenting the negotiated sale.

You will develop skills to be able to prepare for objections and negotiation with the customer, handle objections, negotiate with the customer and close the sale following negotiations.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Sales in *Annexe B*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 handle objections and negotiate with the customer	1.1	Describe the scope of authority and responsibility when dealing with objections			
		1.2	Identify the resources available to counter the sales objections			
		1.3	Describe how to plan and prepare for negotiation			
		1.4	Describe how to use testimonials to progress a sale			
		1.5	Explain the advantages and disadvantages of different methods of closing a sale			
		1.6	Explain organisational procedures for documenting the negotiated sale			
2	Be able to prepare for objections and negotiation with the customer	2.1	Identify possible sales objections and appropriate responses prior to dealing with the customer			
		2.2	Confirm authorisation to negotiate			
		2.3	Prepare a negotiation plan that is capable of providing a mutually acceptable outcome			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to handle objections	3.1	Identify customer needs and wants in relation to objections by using a variety of questioning techniques			
		3.2	Identify and prioritise customers' concerns			
		3.3	Provide evidence to the customer of the strengths of the organisation's products or services			
		3.4	Confirm with the customer that the objection(s) have been overcome			
		3.5	Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals			
4	Be able to negotiate with the customer	4.1	Carry out negotiations according to negotiation plan			
		4.2	Promote the benefits of what is being offered to the customer			
		4.3	Explain to the customer when and why no further adjustment is possible			
		4.4	Obtain support to progress negotiation that is outside own level of authority			
5	Be able to close the sale following negotiation	5.1	Apply a trial close in accordance with the negotiation plan			
		5.2	Respond to any further objections and concerns			
		5.3	Identify and make use of potential add-on, up-selling or cross-selling opportunities			
		5.4	Summarise agreements made in accordance with organisational procedures and close the sale			

Learner name: ____ Date: ___________________________

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Assessor signature: ____ Date: ___________________________

Internal verifier signature: ___________________________________ Date: ___________________________
(*if sampled*)

Unit 13: Develop, Maintain and Review Personal Networks

Unit reference number: R/600/9587

Level: 4

Credit value: 4

Guided learning hours: 25

Unit summary

Networking is about making connections and building mutually beneficial relationships. Social networking is very important in today's business world and you need to be aware of how to use it effectively to develop personal networks, as well as understanding the risks this can pose in terms of privacy and confidentiality.

Developing network relationships is an important factor for business success and professional development.

In this unit, you will learn the benefits of networking and the need for data privacy, including the benefits of networking with individuals and organisations and the need for confidentiality with contacts.

You will also learn how to develop a personal network of contacts, including developing networks that will provide personal and organisational benefit and developing guidelines for working with networks.

Finally, you will learn how to review networking relationships, including assessing the value of your current personal network and evaluating your experiences with existing contacts and how to use them to inform future actions.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 of networking and the need for data privacy	1.1	Evaluate the benefits of networking with individuals and organisations			
		1.2	Identify individuals and organisations that would provide benefits to own organisation and networks			
		1.3	Explain the need for confidentiality with networking contacts			
2	Be able to develop a personal network of contacts	2.1	Develop networks that will provide personal and organisational benefit			
		2.2	Develop guidelines for working with networks in line with organisational procedures			
3	Be able to review networking relationships	3.1	Assess the value own current personal network			
		3.2	Evaluate own experience with existing contacts and use these to inform future actions			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

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

Unit 14: Advise Clients on Strategic Recruitment Planning

Unit reference number: K/504/6960

Level: 4

Credit value: 5

Guided learning hours: 20

Unit summary

In this unit, you will learn the nature of human resource planning. You will examine the impact of different organisational structures in the public and private sectors on the planning process, and analyse the role of recruitment in human resource planning.

You will also learn how to define clients' strategic recruitment needs, by analysing employment-related trends and patterns in the client's industry, analysing the availability of suitable personnel in the labour market and calculating the cost of hiring time, fees and staff costs to the client, and retention and attrition costs for replacement staff.

Finally, you will learn how to evaluate the effectiveness of the recruitment strategy, by agreeing appropriate indicators and key milestones. You will use valid methods of evaluation and identify the degree of success in meeting clients' objectives.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 nature of human resource planning	1.1	Explain the impact of different organisational structures in the public and private sectors on the planning process			
		1.2	Assess the considerations to be taken into account in human resource planning			
		1.3	Analyse the role of recruitment in human resource planning			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Define clients' strategic recruitment needs	2.1	Analyse employment-related trends and patterns in the client's industry			
		2.2	Determine the client's current and future workforce needs, taking the organisation's structure and position in the lifecycle into account			
		2.3	Analyse the availability of suitable personnel in the labour market			
		2.4	Evaluate the feasibility, timescale and costs of alternative recruitment solutions			
		2.5	Calculate the cost of hiring time, fees/staff costs to the client, retention and attrition costs for replacement staff			
		2.6	Present a business case with recommendations to the client, showing costs, benefits and performance measures (long and short term) of the proposed recruitment strategy			
		2.7	Agree mutually acceptable terms and conditions of business with the client			
		2.8	Ensure all recruitment policies, materials and processes meet legal and ethical requirements			
3	Evaluate the effectiveness of the recruitment strategy	3.1	Agree indicators that are capable of measuring the effectiveness of the strategy and key milestones			
		3.2	Use valid methods of evaluation			
		3.3	Identify the degree of success in meeting the client's objectives			

Learner name: ____ Date: ____________________________

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Assessor signature: ____ Date: ____________________________

Internal verifier signature: _____________________________________ Date: ____________________________
(*if sampled*)

Unit 15: Co-Ordinate Flexible Workers

Unit reference number: J/504/6979

Level: 3

Credit value: 6

Guided learning hours: 40

Unit summary

In this unit, you will learn how to place flexible workers with clients, by confirming roles, requirements and duration of appointments, agreeing rates of pay and other benefits and conditions and carrying out any necessary pre-appointment checks.

You will also learn how to manage clients' bookings for flexible staff, by confirming the suitability and efficiency of flexible staff placed with employers, keeping databases of flexible workers up-to-date and using information and feedback from clients to enhance the service.

Finally, you will learn how to co-ordinate the needs of flexible workers, by maintaining current and accurate records of their skills and availability, advertising for new flexible workers and ensuring all recruitment policies, materials and processes meet legal and ethical requirements.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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	Place flexible workers with clients	1.1	Confirm the roles, requirements and duration of appointments for flexible workers in accordance with current legislation			
		1.2	Agree rates of pay and any other benefits and conditions in accordance with current legislation			
		1.3	Carry out any necessary pre-appointment checks			
		1.4	Place suitable flexible workers within the agreed timescale			
		1.5	Use feedback from continuing contact with flexible workers to make improvements			
2	Manage clients' bookings for flexible staff	2.1	Confirm the suitability and efficiency of flexible staff placed with employers			
		2.2	Keep databases of flexible workers up to date			
		2.3	Ensure the accuracy of contractual records			
		2.4	Use information and feedback from clients to enhance the service			
		2.5	Arrange for payments to be made in accordance with agreements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Co-ordinate the needs of flexible workers	3.1	Maintain current and accurate records of flexible workers' skills and availability			
		3.2	Maintain the continuing commitment of inactive flexible workers through regular contact			
		3.3	Market for new flexible workers in accordance with the candidate attraction plan			
		3.4	Ensure all recruitment policies, materials and processes meet legal and ethical requirements			

Learner name: ______________________________ Date: ____________________

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Assessor signature: ___________________________ Date: ____________________

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(*if sampled*)

Unit 16: Conduct Market Research

Unit reference number: H/502/9929

Level: 3

Credit value: 6

Guided learning hours: 10

Unit summary

In this unit, you will learn how to identify the need for market research, by establishing the nature of the marketing issue for which information is needed. You will learn how to agree a research budget and SMART objectives.

You will also learn how to design market research projects, by establishing the sources of reliable quantitative and qualitative information most likely to yield the required information. You will develop a research project proposal and rationale that addresses the research objectives, explain the strengths and limitations of the ranges of proposed research methods, and explain the importance of validating information.

Finally, you will learn how to manage market research data collection, by ensuring that the team is briefed on the objectives and data collection tasks, providing progress and variances in accordance with the market research plan and evaluating the effectiveness of the market research data collection against agreed criteria.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Sales in *Annexe B*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 identify the need for market research	1.1	Establish the nature of the marketing issue for which information is needed			
		1.2	Agree the research budget and timescale			
		1.3	Agree specific, measurable, realistic and time-bound objectives			
2	Be able to design market research projects	2.1	Determine the research method(s) and instrument(s) best suited to obtaining the required information within budget			
		2.2	Establish the sources of reliable quantitative and qualitative information most likely to yield the required information			
		2.3	Develop a research project proposal and rationale that addresses the research objectives			
		2.4	Obtain approval to the specified actions, responsibilities, timescales and budget for the research			
		2.5	Explain the strengths and limitations of the ranges of proposed research methods			
		2.6	Explain the use of a sample in designing market research projects			
		2.7	Explain the importance of validating information			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to manage market research data collection	3.1	Ensure that the team is briefed on the objectives and data collection tasks			
		3.2	Ensure that data collection activities are carried out in accordance with the market research plan			
		3.3	Provide progress and variance reports in accordance with the data collection plan			
		3.4	Address issues and variances in accordance with the market research plan			
		3.5	Ensure that the data collection is conducted in accordance with legal, regulatory and industry requirements and standards			
		3.6	Present the data in the agreed format within the agreed timescale			
		3.7	Evaluate the effectiveness of the market research data collection against agreed criteria			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

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

Unit 17: Monitoring and Managing Sales Team Performance

Unit reference number: M/502/8654

Level: 4

Credit value: 5

Guided learning hours: 32

Unit summary

Having a carefully designed process to ensure high performance and quality of work is key to getting the most out of teams.

In this unit, you will understand methods of monitoring sales team performance by explaining the importance of monitoring sales team performance, the importance of giving feedback on performance, the use of sales-related information in managing the performance of sales team members, and the use of tools in monitoring the performance of the team.

You will also learn how to manage the performance of the sales team. This will include determining key performance indicators for monitoring the performance of individual sales staff, planning the work of the sales team, and monitoring the quantity and quality of team members' work against agreed key performance indicators.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Sales in *Annexe B*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 methods of monitoring sales team performance	1.1	Explain the importance of monitoring sales team performance			
		1.2	Explain the importance of giving feedback on performance			
		1.3	Describe the role of key performance indicators in monitoring sales team performance			
		1.4	Explain the importance of encouraging sales team members to ask questions, make suggestions and seek clarification			
		1.5	Explain the use of sales-related information in managing the performance of sales team members in formal performance appraisals			
		1.6	Explain the use of tools in monitoring performance of the team			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to manage performance of the sales team	2.1	Determine key performance indicators for monitoring the performance of individual sales staff that are appropriate for their targets and objectives			
		2.2	Plan the work of the sales team, identifying priorities, resources and/or critical activities			
		2.3	Provide practical help to sales staff in support of achieving their sales objectives			
		2.4	Monitor the quantity and quality of sales team members' work against agreed key performance indicators			
		2.5	Provide feedback to sales staff on their sales performance			
		2.6	Give public recognition to successful performance			
		2.7	Agree ways of improving performance in cases of unacceptable performance			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

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(*if sampled*)

Unit 18: Developing Sales Proposals

Unit reference number:	**A/502/8656**
Level:	**4**
Credit value:	**5**
Guided learning hours:	**30**

Unit summary

This unit will enable you to provide a valuable service for any company in the sales industry. This is because you will be able to develop and evaluate sales proposals effectively and efficiently for your employers, which will lead to increased profits and an enhanced reputation for your company. This in turn will boost your reputation, which will help you to progress in your career.

You will be meticulous in making sure the customers' requirements are properly addressed, compared with the conditions and constraints which have to be considered to protect your own company's interests; for example, making sure the proposals are based on the state of current markets and that the price is consistent with the value of each proposal.

You will pay due regard to presenting the proposals in house style and within agreed timescales. Where you have queries, you will seek clarification from others and will always obtain approval from your managers before submitting any proposal.

A key part of your role will be to evaluate proposals by getting feedback from colleagues and customers. This will enable you to judge whether your proposals have been successful and whether you could make improvements in the future.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Sales in *Annexe B*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 write sales proposals	1.1	Explain how to write a proposal that differentiates the offer from that of a competitor and promotes organisational strengths			
		1.2	Describe how to put together a persuasive argument based on quantitative and qualitative evidence			
		1.3	Explain the importance of addressing the brief in tender documentation			
		1.4	Explain the importance of using the ‘house style’ in proposals			
		1.5	Explain the legal and ethical issues relating to sales proposals			
		1.6	Explain the client’s procedures for submitting sales proposals			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to develop sales proposals	2.1	Ensure the prospect's or customer's requirements are addressed in the proposal			
		2.2	Ensure that all identified issues requiring clarification are resolved before the proposal is finalised			
		2.3	Identify the conditions and constraints which need to be included within the proposal in order to protect the organisation's interests			
		2.4	Present the proposal in 'house style'			
		2.5	Ensure that the proposal is based on market factors			
		2.6	Provide the required level of detail as briefed by the prospect or customer			
		2.7	Ensure that the price reflects the value within the proposal			
		2.8	Gain internal approval before submission			
		2.9	Supply the proposal within the agreed timescale			
3	Be able to evaluate the proposal	3.1	Obtain feedback from colleagues and the customer on the proposal			
		3.2	Evaluate the outcome of the proposal and recommend improvements for the future			

Learner name: ____ Date: ___________________________

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Assessor signature: ____ Date: ___________________________

Internal verifier signature: ___________________________________ Date: ___________________________
(*if sampled*)

Unit 19: Manage Budgets

Unit reference number: T/601/2580

Level: 4

Credit value: 5

Guided learning hours: 29

Unit summary

In this unit, you will understand the purpose of budgets. You will explain the purpose and benefits of managing financial resources effectively and efficiently, and be able to describe different types of budgetary systems and their features. You will also learn how to manage budgets, including studying methods for monitoring, controlling and recording income and expenditure, ways in which costs may be minimised in your area of responsibility, and situations in which corrective action may be needed.

You will understand how to report performance against budgets by looking at the purpose and benefits of reporting this information, learning how to check the accuracy of budget calculations, and learning the purpose and benefits of recording information that will help with the future preparation of budgets.

Finally, you will learn how to monitor budgets, including recording transactions, producing information on performance against budget, making sure calculations are accurate, and recording information that will help with the preparation of future budgets.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Recruitment in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 purpose of budgets	1.1	Explain the purpose and benefits of managing financial resources effectively and efficiently			
		1.2	Identify legal, regulatory and organisational requirements for managing a budget			
		1.3	Describe different types of budgetary systems and their features			
2	Understand how to manage budgets	2.1	Describe methods for monitoring, controlling and recording income and expenditure			
		2.2	Describe ways in which costs may be minimised in own area of responsibility			
		2.3	Identify situations in which corrective action may be needed			
		2.4	Describe the scope of own authority for managing a budget and authorising expenditure			
3	Understand how to report performance against budgets	3.1	Explain the purpose and benefits of reporting information on performance against budget			
		3.2	Explain how to check the accuracy of budget calculations			
		3.3	Explain the purpose and benefits of recording information that will help with the future preparation of budgets			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to manage budgets	4.1	Control budget performance within limits and deadlines			
		4.2	Analyse and take action to minimise costs where possible			
		4.3	Take corrective action to make sure of best value for money			
		4.4	Authorise expenditure within the scope of own authority			
5	Be able to monitor budgets	5.1	Record transactions, as required			
		5.2	Produce information on performance against budget, when required			
		5.3	Make sure all calculations are accurate			
		5.4	Record information that will help with the preparation of future budgets			

Learner name: ______________________________ Date: ______________________

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Assessor signature: __________________________ Date: ______________________

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

Unit 20: Preparing and Delivering a Sales Presentation

Unit reference number:	**L/502/8631**
Level:	**3**
Credit value:	**4**
Guided learning hours:	**28**

Unit summary

In this unit, you will understand the factors for consideration when preparing sales presentations. You will learn, the importance of presentations to achieving sales targets, explaining the difference between formal and informal presentations and describing how customer characteristics and buying behaviours will influence a presentation.

You will learn how to prepare a sales presentation, including setting its objectives, ensuring they reflect the customers' or audience's needs and interests, obtaining promotional material that will enhance the presentation and including the product or service's benefits and unique selling propositions.

You will learn how to use verbal and non-verbal communications in presentations, explaining the importance of rehearsing the presentation and describing techniques to capture and retain the audience's attention.

Finally, you will learn how to deliver a sales presentation, including using pitch, tone and pace of delivery to engage the audience. You will also learn how to give the audience opportunities to ask questions and raise objections, respond to questions, concern and objections from the customer or audience, and evaluate the effectiveness of the presentation in light of stakeholder feedback and subsequent sales-related activities and outcomes.

Unit assessment requirements/evidence requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Sales in *Annexe B*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions. This includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

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 factors for consideration in the preparation of sales presentations	1.1	Explain the importance of presentations to the achievement of sales targets			
		1.2	Explain the difference between formal and informal presentations			
		1.3	Explain the importance of setting aims and objectives when preparing a presentation			
		1.4	Describe how customer characteristics and buying behaviours will influence a presentation			
		1.5	Identify who to go to for support relating to the presentation			
		1.6	Explain the legal, social and ethical constraints that need to be considered when designing and delivering sales presentations			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to prepare a sales presentation	2.1	Describe the needs of the customer or audience			
		2.2	Set objectives for the sales presentation ensuring they reflect the customers' or audience's needs and interests			
		2.3	Assess the suitability of the venue for the presentation, and review issues relating to its size, acoustics and layout			
		2.4	Identify and prepare resources for delivery of the presentation			
		2.5	Obtain promotional material that will enhance the presentation			
		2.6	Include the product/service benefits and/or unique selling propositions in the presentation			
		2.7	Structure the presentation in line with its objectives			
		2.8	Ensure the presentation complements any proposal already supplied to the customer			
		2.9	Ensure the presentation can be delivered within the agreed timescale			
3	Understand how to deliver sales presentations	3.1	Describe how to use verbal and non-verbal communications in presentations			
		3.2	Explain the importance of rehearsing a presentation			
		3.3	Describe techniques to capture and retain the audience's attention			
		3.4	Describe the organisational methods for reporting and recording the outcome of presentations			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to deliver a sales presentation	4.1	Use pitch, tone and pace of delivery to engage the audience			
		4.2	Deliver a presentation that captures and retains the audience's attention			
		4.3	Use visual aids and/or publicity materials to support the presentation			
		4.4	Provide the audience with opportunities to ask questions and raise objections			
		4.5	Respond to questions, concerns and objections from the customer or audience in a way that gives a positive image of the organisation and its products and/or services			
		4.6	Gain commitment to proceed with the sale			
		4.7	Evaluate the effectiveness of the presentation in the light of stakeholder feedback and subsequent sales related activities and outcomes			

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))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* (Pearson)

All of these publications are available on our website: qualifications.pearson.com

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website on the Delivering BTEC pages. 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.

13 Professional development and training

Professional development and training

Pearson supports customers with training related to our qualifications. This support is available through a choice of training options offered on our website.

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. 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/en/support/contact-us.html

Online support: find the answers to your questions in *Knowledge Base*, a searchable database of FAQs and useful videos that we have put together with the help of our subject advisors to support you in your role. Whether you are a teacher, administrator, Assessment Associate (AA) or training provider, you will find answers to your questions. If you are unable to find the information you need please send us your query and our qualification or administrative experts will get back to you.

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

Annexe A: Recruitment Assessment Strategy

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: Sales Assessment Strategy

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.

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