

# **Pearson Edexcel Level 2 Certificate in Trade Business Services**

# **Pearson Edexcel Level 2 Diploma in Trade Business Services**

## **Specification**

NVQ/Competence-based qualifications

First registration October 2013

Issue 2

## **Edexcel, BTEC and LCCI qualifications**

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

## **About Pearson**

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

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

These qualifications were previously known as:

Pearson Edexcel Level 2 Certificate in Trade Business Services (QCF)

Pearson Edexcel Level 2 Diploma in Trade Business Services (QCF)

The QNs remain 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 going to publication.*

ISBN 9781446954232

All the material in this publication is copyright

© Pearson Education Limited 2017

## Summary of Pearson Edexcel Level 2 Certificate and Diploma in Trade Business Services specification 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 4
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](http://qualifications.pearson.com/en/support/contact-us.html).



# Contents

<b>Purpose of this specification</b>	<b>1</b>
<b>1 Introducing Pearson Edexcel NVQ/Competence-based qualifications</b>	<b>2</b>
What are NVQ/Competence-based qualifications?	2
Sizes of NVQ/Competence-based qualifications	2
<b>2 Qualification summary and key information</b>	<b>4</b>
Qualification number and qualification title	6
Qualifications objectives	6
Relationship with previous qualifications	6
Apprenticeships	6
Progression opportunities through Pearson qualifications	7
Industry support and recognition	7
Relationship with National Occupational Standards	7
<b>3 Qualification structures</b>	<b>8</b>
Pearson Edexcel Level 2 Certificate in Trade Business Services	8
Pearson Edexcel Level 2 Diploma in Trade Business Services	11
<b>4 Assessment</b>	<b>14</b>
Types of evidence	15
<b>5 Centre resource requirements</b>	<b>16</b>
General resource requirements	16
Specific resource requirements	16
<b>6 Centre recognition and approval</b>	<b>17</b>
Centre recognition	17
Approvals agreement	17
<b>7 Quality assurance of centres</b>	<b>18</b>
<b>8 Programme delivery</b>	<b>19</b>
<b>9 Access and recruitment</b>	<b>20</b>
<b>10 Access to qualifications for learners with disabilities or specific needs</b>	<b>21</b>
<b>11 Unit format</b>	<b>22</b>
Unit title	22

Unit reference number	22
Level	22
Credit value	22
Guided learning hours	22
Unit aim	22
Unit assessment requirements/evidence requirements	22
Learning outcomes	23
Assessment criteria	23
Unit 1: Communicate with customers in a trade business workplace	24
Unit 2: Reduce the risks to health and safety in a trade business workplace	28
Unit 3: Deliver reliable customer service in the trade business workplace	32
Unit 4: Contribute to the provision of customer service in the trade business workplace	36
Unit 5: Use Email for business to business communications	41
Unit 6: Use electronic message systems for business to business communications	45
Unit 7: Support business to business customer service improvements	49
Unit 8: Promote products and services to business customers	53
Unit 9: Planning and delivering the features and benefits of products and services to business customers	58
Unit 10: Make telephone calls to customers in a business to business workplace	62
Unit 11: Deal with incoming telephone calls from customers in a business to business workplace	68
Unit 12: Communicate with business customers in writing	75
Unit 13: Sell face to face in a business to business workplace	81
Unit 14: Develop working relationships with colleagues in a business to business workplace	86
Unit 15: Manage personal workskills development in a business to business workplace	90
Unit 16: Keep stock at required levels in trade business operations	94
Unit 17: Check stock levels and stock records in trade business operations	98
Unit 18: Process business customer payments	102
Unit 19: Process applications for business customer credit agreements	106

Unit 20: Process business customer sales orders	109
Unit 21: Process business expense payments	118
Unit 22: How to follow a design process in a trade business workplace	121
Unit 23: Application of techniques for the design of trade business products	125
Unit 24: Research and apply techniques for trade business customer design plans	129
Unit 25: Determine trade business customer design brief requirements	132
Unit 26: Use database software in a business to business organisation	135
Unit 27: Use imaging software in a business to business organisation	139
Unit 28: Use spreadsheet software in a business to business organisation	143
<b>12 Further information and useful publications</b>	<b>147</b>
<b>13 Professional development and training</b>	<b>148</b>
<b>14 Contact us</b>	<b>149</b>
<b>Annexe A: Realistic Working Environment</b>	<b>150</b>
<b>Annexe B: Personal, Learning and Thinking Skills (PLTS) Mapping</b>	<b>152</b>



# Purpose of this specification

This specification sets out:

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

# 1 Introducing Pearson Edexcel NVQ/Competence-based qualifications

## What are NVQ/Competence-based qualifications?

---

National Vocational Qualifications (NVQs) or Competence-based qualifications reflect the skills and knowledge needed to do a job effectively. They are work-based qualifications that give learners the opportunity to demonstrate their competence in the area of work or job role to which the qualification relates.

NVQs/Competence-based qualifications are outcomes-based with no fixed learning programme, allowing flexibility in their delivery to meet the individual learner's needs. The qualifications are based on the National Occupational Standards (NOS) for the sector, which define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles.

Most NVQ/Competence-based qualifications form the competence component of Apprenticeship Frameworks. 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.

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

## Sizes of NVQ/Competence-based qualifications

---

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

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

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

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

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

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 2 Certificate in Trade Business Services
Qualification Number (QN)	601/1292/X
Regulation start date	13/09/2013
Operational start date	01/10/2013
Approved age ranges	16-18 19+ Please note that sector-specific requirements or regulations may prevent learners of a particular age from embarking on this qualification. Please refer to the assessment requirements/strategy.
Credit value	27
Assessment	Portfolio of Evidence (internal assessment)
Total Qualification Time (TQT)	270
Guided learning hours	161
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, centres must follow the Pearson Access and Recruitment policy (see <i>Section 9, Access and Recruitment</i> )
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.

Qualification title	Pearson Edexcel Level 2 Diploma in Trade Business Services
Qualification Number (QN)	601/1291/8
Regulation start date	13/09/2013
Operational start date	01/10/2013
Approved age ranges	16-18 19+ Please note that sector-specific requirements or regulations may prevent learners of a particular age from embarking on this qualification. Please refer to the assessment requirements/strategy.
Credit value	37
Assessment	Portfolio of Evidence (internal assessment)
Total Qualification Time (TQT)	370
Guided learning hours	229
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, centres must follow the Pearson Access and Recruitment policy (see <i>Section 9, Access and Recruitment</i> )
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.

## Qualification number and qualification title

---

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

## Qualifications objectives

---

The Pearson Edexcel Level 2 Certificate in Trade Business Services and Pearson Edexcel Level 2 Diploma in Trade Business Services are for learners who work in, or want to work in workplace where the products and services offered are directed towards other businesses, i.e. in a business to business context. Learners will typically be part of a team working with staff responsible for a variety of activities including stock control, ongoing sales, sales generation, account management or design services.

It gives learners the opportunity to:

- demonstrate competence in the following roles: Administrator, Business Developer, Trade Counter Sales, Customer Service Assistant, Warehouse Personnel, Sales Representative, Designer
- develop knowledge and skills related to the specified job roles in business to business services for example in a trade business serving the construction industry
- achieve a nationally-recognised Level 2 qualification

## Relationship with previous qualifications

---

The Pearson Edexcel Level 2 Certificate/Diploma in Trade Business Services are new qualifications which form the competence components of the Intermediate Apprenticeship in Trade Business Services.

## Apprenticeships

---

Skillsmart Retail UK Ltd approve the Pearson Edexcel Level 2 Certificate/Diploma in Trade Business Services (QCF) as the competence component for the Intermediate Apprenticeship in Trade Business Services.

## **Progression opportunities through Pearson qualifications**

---

Learners who have achieved the Pearson Edexcel Level 2 Certificate/Diploma can progress to the Pearson BTEC Level 2 Certificate and Diploma in Retail Knowledge, Pearson Edexcel Level 2 Certificate or Diploma in Retail Skills, Pearson BTEC Level 3 Certificate or Diploma in Retail Knowledge or the Pearson Edexcel Level 3 in Retail Skills (Visual Merchandising), (Sales Professional) or (Management). The qualification can encourage progression as learners will develop the knowledge and understanding needed to progress through associated positions and into senior roles, and can potentially provide access opportunities to further or higher education.

## **Industry support and recognition**

---

These qualifications are supported by Skillsmart Retail UK Ltd, the Sector Skills Council for retail.

## **Relationship with National Occupational Standards**

---

These qualifications are based on the National Occupational Standards (NOS) in Retail, IT and Customer Service, which were set and designed by Skillsmart Retail UK Ltd, Proskills UK, e-skills UK and Skills CFA the Sector Skills Councils for the sectors.

### 3 Qualification structures

#### Pearson Edexcel Level 2 Certificate in Trade Business Services

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	27
Maximum number of credits that may be achieved	36
Number of mandatory credits that must be achieved	8
Number of optional credits that must be achieved	19

Unit	Unit reference number	Mandatory units – Group A Learners must complete both units from this group	Level	Credit	Guided learning hours
1	L/505/4503	Communicate With Customers in a Trade Business Workplace	2	3	25
2	R/505/4504	Reduce the risks to health and safety in a trade business workplace	2	2	20
Unit	Unit reference number	Option Group B Learners must complete ONE unit from this group	Level	Credit	Guided learning hours
3	Y/505/4505	Deliver reliable customer service in the trade business workplace	2	3	25
4	D/505/4506	Contribute to the provision of customer service in the trade business workplace	2	3	18
Unit	Unit reference number	Optional units – Group C Learners must achieve a minimum of 19 credits from this group	Level	Credit	Guided learning hours
5	H/505/4507	Use Email for Business to Business Communications <b>Barred combination with unit 6</b>	2	3	20
6	K/505/4508	Use Electronic Message Systems for Business to Business Communications <b>Barred combination with unit 5</b>	2	1	6

Unit	Unit reference	Optional units – Group C	Level	Credit	Guided learning hours
7	M/505/4509	Support Business to Business Customer Service Improvements	2	5	33
8	H/505/4510	Promote Products and Services to Business Customers	2	6	40
9	K/505/4511	Planning and Delivering the Features and Benefits of Products and Services to Business Customers	2	3	20
10	M/505/4512	Make Telephone Calls to Customers in a Business to Business Workplace	2	3	20
11	T/505/4513	Deal with Incoming Telephone Calls From Customers in a Business to Business Workplace	2	3	20
12	A/505/4514	Communicate With Business Customers in Writing	3	3	20
13	F/505/4515	Sell Face to Face in a Business to Business Workplace	2	4	25
14	J/505/4516	Develop Working Relationships With Colleagues in a Business to Business Workplace	2	1	10
15	L/505/4517	Manage Personal Workskills Development in a Business to Business Workplace	2	2	20
16	R/505/4518	Keep Stock at Required Levels in Trade Business Operations <b>Barred combination with unit 17</b>	2	3	12
17	Y/505/4519	Check Stock Levels and Stock Records in Trade Business Operations <b>Barred combination with unit 16</b>	2	3	10
18	R/505/4521	Process Business Customer Payments	2	2	20
19	Y/505/4522	Process Applications for Business Customer Credit Agreements	2	2	20
20	D/505/4523	Process Business Customer Sales Orders	2	4	25
21	H/505/4524	Process Business Expense Payments	2	1	8
22	K/505/452	How to Follow a Design Process in a Trade Business Workplace	2	3	21
23	T/505/4527	Application of Techniques for the Design of Trade Business Products	2	3	21

Unit	Unit reference	Optional units – Group C	Level	Credit	Guided learning hours
24	F/505/4529	Research and Apply Techniques for Trade Business Customer Design Plans	2	2	15
25	T/505/4530	Determine Trade Business Customer Design Brief Requirements	2	2	14
26	A/505/4531	Use Database Software in a Business to Business Organisation	2	4	30
27	F/505/4532	Use Imaging Software in a Business to Business Organisation	2	4	30
28	J/505/4533	Use Spreadsheet Software in a Business to Business Organisation	2	4	20

Centres should be aware that within the Level 2 qualification in this specification, learners will be required to meet the demands of a unit at level 3. Centres are advised to consider the support, guidance and opportunities they give to learners to meet the demands of the higher level unit during delivery and assessment of the qualification.

## Pearson Edexcel Level 2 Diploma in Trade Business Services

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	37
Number of mandatory credits that must be achieved	8
Number of optional credits that must be achieved	29

Unit	Unit reference number	Mandatory units – Group A Learners must complete both units from this group	Level	Credit	Guided learning hours
1	L/505/4503	Communicate With Customers in a Trade Business Workplace	2	3	25
2	R/505/4504	Reduce the risks to health and safety in a trade business workplace	2	2	20
Unit	Unit reference number	Option Group B Learners must complete ONE unit from this group	Level	Credit	Guided learning hours
3	Y/505/4505	Deliver reliable customer service in the trade business workplace	2	3	25
4	D/505/4506	Contribute to the provision of customer service in the trade business workplace	2	3	18
Unit	Unit reference number	Optional units – Group C Learners must achieve a minimum of 29 credits from this group	Level	Credit	Guided learning hours
5	H/505/4507	Use Email for Business to Business Communications <b>Barred combination with unit 6</b>	2	3	20
6	K/505/4508	Use Electronic Message Systems for Business to Business Communications <b>Barred combination with unit 5</b>	2	1	6

Unit	Unit reference	Optional units – Group C	Level	Credit	Guided learning hours
7	M/505/4509	Support Business to Business Customer Service Improvements	2	5	33
8	H/505/4510	Promote Products and Services to Business Customers	2	6	40
9	K/505/4511	Planning and Delivering the Features and Benefits of Products and Services to Business Customers	2	3	20
10	M/505/4512	Make Telephone Calls to Customers in a Business to Business Workplace	2	3	20
11	T/505/4513	Deal with Incoming Telephone Calls From Customers in a Business to Business Workplace	2	3	20
12	A/505/4514	Communicate With Business Customers in Writing	3	3	20
13	F/505/4515	Sell Face to Face in a Business to Business Workplace	2	4	25
14	J/505/4516	Develop Working Relationships With Colleagues in a Business to Business Workplace	2	1	10
15	L/505/4517	Manage Personal Workskills Development in a Business to Business Workplace	2	2	20
16	R/505/4518	Keep Stock at Required Levels in Trade Business Operations <b>Barred combination with unit 17</b>	2	3	12
17	Y/505/4519	Check Stock Levels and Stock Records in Trade Business Operations <b>Barred combination with unit 16</b>	2	3	10
18	R/505/4521	Process Business Customer Payments	2	2	20
19	Y/505/4522	Process Applications for Business Customer Credit Agreements	2	2	20
20	D/505/4523	Process Business Customer Sales Orders	2	4	25
21	H/505/4524	Process Business Expense Payments	2	1	8
22	K/505/452	How to Follow a Design Process in a Trade Business Workplace	2	3	21
23	T/505/4527	Application of Techniques for the Design of Trade Business Products	2	3	21

Unit	Unit reference	Optional units – Group C	Level	Credit	Guided learning hours
24	F/505/4529	Research and Apply Techniques for Trade Business Customer Design Plans	2	2	15
25	T/505/4530	Determine Trade Business Customer Design Brief Requirements	2	2	14
26	A/505/4531	Use Database Software in a Business to Business Organisation	2	4	30
27	F/505/4532	Use Imaging Software in a Business to Business Organisation	2	4	30
28	J/505/4533	Use Spreadsheet Software in a Business to Business Organisation	2	4	20

Centres should be aware that within the Level 2 qualification in this specification, learners will be required to meet the demands of a unit at level 3. Centres are advised to consider the support, guidance and opportunities they give to learners to meet the demands of the higher level unit during delivery and assessment of the qualification.

## 4 Assessment

These qualifications are assessed through an externally verified Portfolio of Evidence that consists of evidence gathered during the course of the learner's work.

To achieve a pass for the full qualification, the learner must achieve all the required units in the stated qualification structure. 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, and it should be cross-referenced to the evidence provided. The assessment record should include details of the type of evidence and the date of assessment. The unit specification or suitable centre documentation can be used to form an assessment record.

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

<b>Valid</b>	relevant to the standards for which competence is claimed
<b>Authentic</b>	produced by the learner
<b>Current</b>	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
<b>Reliable</b>	indicates that the learner can consistently perform at this level
<b>Sufficient</b>	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, whether at or away from the workplace.
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit 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 based on RPL should provide confidence that the same level of skill/understanding/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 the policy document *Recognition of Prior Learning Policy*, available on the Pearson website.
- a **combination** of these.

## 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. The evidence for these qualifications can take a variety of forms as indicated below:

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation (S) (See Annexe A for details)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

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

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. Evidence must be available to the assessor, internal verifier and Pearson standards verifier.

Any specific evidence requirements for individual units are stated in the unit introduction for the units in *Section 11*.

There is further guidance about assessment on our website. Please see *Section 12* for details.

## 5 Centre resource requirements

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

### General resource requirements

---

- Centres must have the appropriate physical resources to support both the delivery and assessment of the qualifications. For example, a workplace in line with industry standards, or a Realistic Working Environment (RWE), where permitted, equipment, IT, learning materials, teaching rooms.
- Where permitted, RWE 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.
- There must be systems in place to ensure the continuing professional development for staff delivering the qualifications.
- Centres must have appropriate health and safety policies, procedures and practices in place for the delivery of the qualifications.
- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 9 Access and recruitment* and *Section 10 Access to qualifications for learners with disabilities or specific needs*. For full details on the Equality Act 2010, please go to the Home Office website, [www.gov.uk/government/organisations/home-office](http://www.gov.uk/government/organisations/home-office)

### Specific resource requirements

---

As well as the general requirements above, there are specific resource requirements that centres must meet. Specific resources are listed below:

<b>Unit</b>	<b>Resources required</b>
24 Research and Apply Techniques for Trade Business Customer Design Plans	Computer Aided Design/Imaging software
27 Use Imaging Software in a Business to Business Organisation	Computer Aided Design/Imaging software

## 6 Centre recognition and approval

### Centre recognition

---

Centres that have not previously offered Pearson Edexcel accredited 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 Edexcel vocational qualifications is available at [qualifications.pearson.com](http://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.

## 7 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. Centres will internally assess NVQs/Competence-based qualifications using internal quality assurance procedures to ensure standardisation of assessment across all learners. 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, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model is as described below.

Centres offering Pearson Edexcel NVQs/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 must reflect the centre's performance, taking account of the number:

- of assessment sites
- and throughput of learners
- and turnover of assessors
- 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 Pearson BTEC Apprenticeship framework) a single standards verifier will be allocated to verify all elements of the Pearson BTEC Apprenticeship programme. If a centre is also offering stand-alone NVQs/Competence-based qualifications in the same sector as a full Pearson BTEC Apprenticeship, the same standards verifier will be allocated.

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

Centres are required to declare their commitment to ensuring quality and to providing appropriate opportunities for learners that lead to valid and accurate assessment outcomes.

For further details, please go to the UK NVQ Quality Assurance Centre Handbook and the *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* on our website, at [qualifications.pearson.com](http://qualifications.pearson.com).

## 8 Programme delivery

Centres are free to offer the qualifications using any mode of delivery (for example full-time, part-time, evening only, distance learning,) that meets learners' needs. However, centres must make sure that learners have access to the resources identified in the specification and to the sector specialists delivering and assessing the units. Centres must have due regard to Pearson's policies that may apply to different modes of delivery.

Those planning the programme should aim to address the occupational nature of the qualification by:

- engaging with learners, initially, through planned induction, and subsequently through the involvement of learners in planning for assessment opportunities
- using naturally occurring workplace activities and products to present evidence for assessment against the requirements of the qualification
- developing a 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
- taking advantage of suitable digital methods to capture evidence.

## 9 Access and recruitment

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

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

For learners with disabilities and specific needs, this review will need to take account of the support available to them during the delivery and assessment of the qualification. The review must take account of the information and guidance in *Section 10 Access to qualifications for learners with disabilities or specific needs*.

## 10 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires that all learners should 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.

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

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

These documents are available on our website, at [qualifications.pearson.com](http://qualifications.pearson.com)

# 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 aim

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

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

## **Assessment criteria**

The assessment criteria specify the standard required by the learner to achieve the learning outcome.

# Unit 1: Communicate with customers in a trade business workplace

**Unit reference number:** L/505/4503

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 25

---

## Unit aim

Communication skills are an important part of delivering good customer service in a business to business sales workplace. In this unit the learner will demonstrate their understanding and application of speaking, listening and non-verbal communication skills in a trade business workplace, following the requirements of their organisation.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace. All assessment criteria must be fully met.

Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to communicate with customers in trade services workplaces	1.1	Describe the difference between hearing and listening when using verbal communication			
		1.2	Explain how to listen actively			
		1.3	Explain how to respond to positive and negative body language			
		1.4	Explain how to use body language when communicating with customers			
		1.5	Explain the use of questioning techniques to check understanding of customer requirements			
		1.6	Explain how to summarise information for customers			
		1.7	Explain why it is important to speak clearly			
		1.8	Explain why it is important to use organisational customer service language			
		1.9	Describe how to communicate with customers to meet diverse needs			
		1.10	Explain how communication impacts on the customer experience			
		1.11	Identify the information to record for further use			
		1.12	Describe how to determine the messages contained in written communications			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to communicate with customers in the trade business workplace	2.1	Listen actively to what customers are saying			
		2.2	Identify the key requirements of the customer's communication			
		2.3	Check understanding of customer requirements			
		2.4	Summarise information for customers			
		2.5	Explain clearly and politely when unable to help a customer			
		2.6	Use body language to support communication with customers			
		2.7	Respond to customers' body language during face to face communication			
		2.8	Respond to customers in a respectful, helpful and professional way			
		2.9	Use communications techniques to check that customers' needs and expectations have been met			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 2: Reduce the risks to health and safety in a trade business workplace

**Unit reference number:** R/505/4504

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 20

---

## Unit aim

Health and safety at work is required by legislation and both the learner and employer have obligations to meet legal requirements. In this unit the learner will show an understanding of their role and responsibilities to reduce health and safety risks in their workplace. They will also demonstrate that they are able to assess risks, take action on risks and maintain health and safety in their workplace.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand personal role and responsibilities in the reduction of health and safety hazards and risks in the trade business workplace	1.1	Define 'hazards' and 'risks'			
		1.2	Explain personal responsibilities and legal duties in respect of health and safety in the workplace			
		1.3	Identify workplace health and safety instructions relevant to the job role			
		1.4	Explain the importance of remaining alert to the presence of hazards in the workplace			
		1.5	Explain how to report health and safety hazards			
		1.6	Describe where and when to get additional health and safety assistance			
		1.7	Explain why it is important to deal with workplace hazards promptly			
2	Be able to assess the risks to health and safety in the trade business workplace	2.1	Identify those aspects of the workplace and working practices which could harm people			
		2.2	Identify safe working practices which must be followed			
		2.3	Assess, using organisational procedures, which working practices and aspects of the workplace present the highest risks to people			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3.	Be able to take appropriate action when risks to health and safety in the trade business workplace have been identified	3.1	Identify the responsible people that health and safety matters should be reported to			
		3.2	Identify personal scope and responsibility for controlling risks			
		3.3	Identify workplace instructions for managing risks which cannot be dealt with			
		3.4	Respond to hazards in accordance with workplace instructions and legal requirements			
		3.5	Suggest options for reducing risks to health and safety to the responsible people in line with organisational procedure			
4	Be able to maintain health and safety in the trade business workplace	4.1	Carry out work in accordance with safe working practices, workplace instructions, suppliers or manufacturers' instructions and legal requirements			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 3:** **Deliver reliable customer service in the trade business workplace**

**Unit reference number:** Y/505/4505

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 25

---

### **Unit aim**

Good customer service skills are essential in a trade business workplace. In this unit the learner will demonstrate that they are able to deliver their organisation's customer service offer. The learner will also show their understanding of customer service in a trade business workplace. They will also demonstrate that they can prepare to deal with customers, deliver using their organisation's customer service style and check customer service delivery.

### **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace. All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to deliver reliable customer service in trade business workplaces	1.1	Describe an organisation's customer service offer			
		1.2	Explain an organisation's procedures and systems for delivering customer service			
		1.3	Explain an organisation's procedures and systems for checking service delivery			
2	Be able to prepare to deal with customers in a trade business workplace	2.1	Collate information on an organisation's current service offer			
		2.2	Ensure that the work area is tidy, safe and organised			
		2.3	Identify customer requirements before work commences			
3.	Be able to deliver customer service to organisational standards	3.1	Deliver customer service promises in line with organisational standards			
		3.2	Ensure the promise balances the needs of the customer and the organisation			
		3.3	Inform customers where unforeseen circumstances prevent delivery of the promise			
		3.4	Adapt the service to meet the new requirements when customer needs and expectations change			
		3.5	Keep customers informed where the service delivery promise involves other team members			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to check customer service delivery	4.1	Check service delivery met customer needs and expectations			
		4.2	Identify how customer service could have been improved for customers			
		4.3	Share information within the organisation to improve service delivery standards.			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 4: **Contribute to the provision of customer service in the trade business workplace**

**Unit reference number:** D/505/4506

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 18

---

## **Unit aim**

Good customer service skills are essential in a trade business workplace. In this unit the learner will demonstrate they know how to provide for customer service requirements in a trade business operational workplace. They will demonstrate their customer service skills in their organisational workplace.

## **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Learner evidence for how 'types of selling techniques' can be applied in face to face situations must include a minimum of cross selling, up selling and the sale of add-ons.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know how to provide customer service in trade business workplaces	1.1	Explain organisational policies and procedures in relation to the provision of customer service in trade business that relate to: <ul style="list-style-type: none"> <li>- Health, safety and security</li> <li>- Personal protective equipment</li> <li>- Maintaining customer relations</li> <li>- Personal appearance and hygiene</li> <li>- Reporting procedures and systems</li> <li>- Recording and storing information</li> <li>- Confidentiality</li> <li>- Complaints</li> </ul>			
		1.2	Explain how to meet the needs of different organisational customer segments			
		1.3	Describe the importance of <ul style="list-style-type: none"> <li>- Promoting the organisation's image positively</li> <li>- Communicating in line with organisational requirements</li> <li>- Good customer service</li> </ul>			
		1.4	Describe the product and services available to the organisation's customers			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		1.5 Describe the organisational implications of: <ul style="list-style-type: none"> <li>- A negative image</li> <li>- Poor communication</li> <li>- Poor customer service</li> </ul>			
		1.6 Explain how to deal with customer complaints			
		1.7 Identify who to report to when unable to deal with customer's enquiry or request			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to provide customer service in trade business workplaces	2.1	Follow all organisational policies and procedures in relation to providing customer services operations			
		2.2	Develop relationships with customers in line with organisational targets			
		2.3	Check that personal appearance and hygiene meet organisational policies and standards			
		2.4	Communicate with customers in line with organisational requirements			
		2.5	Check all information available is up-to-date and accurate			
		2.6	Identify customer needs			
		2.7	Deal with customer enquiries and complaints in line with organisational requirements			
		2.8	Inform the customer of action that is taken			
		2.9	Maintain customer confidentiality			
		2.10	Update customer records accurately			
		2.11	Record customer enquiries and outcomes accurately using the organisation's procedures and systems			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

(if sampled)

## Unit 5: Use Email for business to business communications

**Unit reference number:** H/505/4507

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 20

---

### Unit aim

In this unit the learner will demonstrate that they can use email software to compose, send and manage incoming business to business customer emails.

### Unit assessment requirements/evidence requirements

**This unit is barred against *Unit 6: Use Electronic Message Systems for Business to Business Communications*.**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to use email software tools and techniques to send business communications	1.1	Use selected software tools to compose and format email messages, including attachments			
		1.2	Determine the message size			
		1.3	Determine how to reduce the message size			
		1.4	Send email messages to individuals			
		1.5	Send email messages to groups			
		1.6	Describe how to stay safe and respect others when using email			
		1.7	Communicate respectfully with others when using email			
		1.8	Use an address book to organise contact information			
2	Be able to manage incoming business to business email	2.1	Follow organisational guidelines and procedures for using email			
		2.2	Respond to email messages in line with organisational requirements			
		2.3	Use email software tools and techniques to automate responses following organisational requirements			
		2.4	Describe how to archive email messages, including attachments			
		2.5	Implement organisational requirements for the organisation, storage and archiving of email messages			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 6: Use electronic message systems for business to business communications

**Unit reference number:** K/505/4508

**Level:** 2

**Credit value:** 1

**Guided learning hours:** 6

---

## Unit aim

Business customers may use a variety of electronic messaging systems to contact a business to business organisation. In this unit the learner will show their understanding of, and be able to use, their organisation's electronic messaging system(s) to communicate with business customers.

## Unit assessment requirements/evidence requirements

**This unit is barred against *Unit 5: Use Email for Business to Business Communications*.**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the use of electronic message systems in business to business workplaces	1.1	Describe the types of electronic message systems used by the organisation			
		1.2	Describe the features of electronic message systems used by the organisation			
		1.3	Explain the purpose of keeping an electronic message system up to date			
		1.4	Describe how to use electronic message systems to check, save and delete messages			
		1.5	Describe how to communicate clearly in messages			
2	Be able to use electronic message systems in business to business workplaces	2.1	Use organisational procedures for checking messages			
		2.2	Use electronic message systems to give and receive information in line with organisational requirements			
		2.3	Respond to messages within agreed organisational timescales			
		2.4	Delete messages following organisational requirements			
		2.5	Select the information to be given when taking and leaving messages			
		2.6	Communicate clearly in messages			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 7: Support business to business customer service improvements

**Unit reference number:** M/505/4509

**Level:** 2

**Credit value:** 5

**Guided learning hours:** 33

---

## Unit aim

Organisations seek to improve their customer service to maintain and grow their market share. In this unit the learner is required to demonstrate that they know how to support customer service improvement, use feedback to inform potential improvements, implement approved customer service changes and evaluate the impact of customer service change in business to business workplaces.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know how to support customer service improvements in a business to business workplace	1.1	Explain how customer experience is influenced by the way service is delivered			
		1.2	Identify how customer feedback is obtained by the organisation			
		1.3	Explain how to work with others to identify the need for service delivery change			
		1.4	Explain how to work with others to support service delivery change			
		1.5	Describe why it is important to give a positive impression to customers about customer service changes			
2	Be able to use feedback to identify potential customer service improvements in a business to business workplace	2.1	Use organisational procedures to collect feedback from customers			
		2.2	Use information from customers to develop a better understanding of the customer service experience			
		2.3	Identify ways to improve customer service provision			
		2.4	Share ideas for improving customer service with other staff			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to implement changes to customer service in a business to business workplace	3.1	Identify a change to improve customer service			
		3.2	Present the customer service improvement idea to staff with authority to approve the change			
		3.3	Implement approved customer service procedural change			
		3.4	Keep customers informed of changes to customer service			
		3.5	Give customers a positive impression of changes that have been made			
		3.6	Work positively with others to support customer service changes			
4	Be able to assist with the evaluation of customer service changes in a business to business workplace	4.1	Review the impact of customer service changes with others			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 8: Promote products and services to business customers**

**Unit reference number: H/505/4510**

**Level: 2**

**Credit value: 6**

**Guided learning hours: 40**

---

### **Unit aim**

There may be opportunities to provide the customer with additional services to customers in a business to business workplace. In this unit the learner must demonstrate their understanding of how to promote additional services to customers. The learner must also demonstrate they are able to identify the additional products and services available, inform their customer and gain customer commitment to purchase.

### **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to promote additional products and services to business customers	1.1	Describe the organisation's procedures and systems for encouraging customer use of additional products and services			
		1.2	Explain how the additional products and services will benefit customers			
		1.3	Explain how customer use of additional products and services will benefit the organisation			
		1.4	Identify common factors that influence customers to use additional products and services			
		1.5	Explain how to introduce the benefits of additional products and services to customers			
		1.6	Explain how to overcome customer reservations			
		1.7	Explain how to close the conversation if the customer shows no interest			
		1.8	Explain how to agree the provision of additional products and services			
		1.9	Describe how to give appropriate and balanced information about the products and services to customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to identify the organisation's additional products and services for business customers	2.1	Collate information about organisational products and services			
		2.2	Identify product and service details that may interest customers			
		2.3	Identify opportunities for offering customers additional products and services			
3	Be able to inform business customers about additional products and services	3.1	Identify openings to inform customers about additional product and service details			
		3.2	Choose how to communicate the product and service offer details to customers			
		3.3	Give accurate information to enable the customer to make a decision on the additional products and services			
		3.4	Give customers opportunities to ask questions about the additional product and service offer			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to gain business customer commitment to using additional products and services	4.1	Give information to move the situation forward when the customer shows interest			
		4.2	Secure customer agreement to the delivery of products and services			
		4.3	Check the customer's understanding of the products and services delivery			
		4.4	Take action to check prompt delivery of the additional products and services to the customer			
		4.5	Refer the customer appropriately where the additional products and services are not within own area of responsibility			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# **Unit 9: Planning and delivering the features and benefits of products and services to business customers**

**Unit reference number: K/505/4511**

**Level: 2**

**Credit value: 3**

**Guided learning hours: 20**

---

## **Unit aim**

In this unit the learner is required to demonstrate their understanding of and skills in preparing and delivering the business to business products and service customer offer. This also includes the presentation of their features and benefits.

## **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace. All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to prepare and deliver the features and benefits of products and services to business customers	1.1	Describe the features and benefits of products and services to be presented			
		1.2	Explain how to provide the features and benefits of products and services in a manner and style which meets the needs of different customers			
		1.3	Explain planning and preparation requirements prior to the sale			
		1.4	Describe the resources required to provide customers with details of the products and services			
2	Be able to prepare a business to business products and services presentation including features and benefits	2.1	Identify personal sales targets			
		2.2	Identify customer needs and wants in relation to the products and services being presented			
		2.3	Agree the objectives of the presentation			
		2.4	Identify resources for the presentation			
		2.5	Plan the presentation structure			
		2.6	Prepare responses to anticipated problems, constraints or objections that could be raised in response to the presentation			
		2.7	Prepare supporting resources consistent with the products and services presentation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to present the features and benefits of business to business products and services	3.1	Promote the features and benefits of products and services			
		3.2	Deliver the presentation in an engaging style and manner that achieves the objectives			
		3.3	Provide the customer with opportunities to ask questions and raise objections			
		3.4	Respond to questions and objections to gain commitment to progress and close the sale			
4	Be able to evaluate the business to business products and services benefits presentation	4.1	Evaluate the presentation against agreed objectives			
		4.2	Provide feedback to colleagues to improve future product and service presentations			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# **Unit 10: Make telephone calls to customers in a business to business workplace**

**Unit reference number: M/505/4512**

**Level: 2**

**Credit value: 3**

**Guided learning hours: 20**

---

## **Unit aim**

Planning and making focussed telephone calls is an important skill when work in a business to business workplace. In this unit learners will show their understanding of telephone call requirements and demonstrate that they are able to plan and use communication equipment to make focussed and effective telephone calls to customers.

## **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to make business to business customer telephone calls	1.1	Describe the requirements of legislation, regulations and organisational procedures applicable to customer information use when planning telephone calls			
		1.2	Describe the organisation's guidelines and procedures for the use of telecommunication technology			
		1.3	Explain how to operate the organisation's telecommunication technology			
		1.4	Describe sources for names and telephone numbers of people to be contacted			
		1.5	Describe organisational structures and communication channels			
		1.6	Explain the reasons for identifying the purpose of a call before making it			
		1.7	Explain the importance of speaking clearly and slowly when dealing with customers by telephone			
		1.8	Describe the effects of smiling and other facial expressions on a telephone conversation			
		1.9	Explain the purpose of giving a positive image of self and the organisation			
		1.10	Explain the importance of adapting speech to meet the needs of customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		1.11	Explain the purpose of summarising the outcomes of a telephone conversation before ending the call			
		1.12	Describe the information to note from telephone conversations			
		1.13	Describe organisational guidelines and procedures for what should be said during telephone conversations with customers			
		1.14	Describe organisational guidelines and procedures for taking action to follow up calls made to customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to plan business to business customer calls	2.1	Use all appropriate customer information to plan calls			
		2.2	Assemble information needed in anticipation of customer's expectations before call commencement			
		2.3	Identify the objective of and desired end result of calls			
		2.4	Plan the opening part of conversations including possible responses			
3	Be able to make business to business customer calls	3.1	Operate telecommunication equipment following organisational requirements			
		3.2	Establish a rapport with customers			
		3.3	Confirm the identity of customers following organisational guidelines			
		3.4	Ensure that customers are aware of the purpose of calls as early as possible			
		3.5	Project a positive image of self and the organisation			
		3.6	Speak clearly and adapt speech to meet the individual needs of customers			
		3.7	Collect correct information from customers			
		3.8	Respond positively to queries and objections from customers			
		3.9	Summarise call outcomes and actions to take			
		3.10	Select information to record and store following organisation's guidelines			
		3.11	Complete follow up actions agreed during the call			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# **Unit 11: Deal with incoming telephone calls from customers in a business to business workplace**

**Unit reference number: T/505/4513**

**Level: 2**

**Credit value: 3**

**Guided learning hours: 20**

---

## **Unit aim**

One of the ways business to business customers make contact is by telephone. In this unit the learner will demonstrate the effective use of organisational communication systems and that during telephone calls they are able to establish rapport with business to business customers.

## **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know how to deal with incoming business customer telephone calls	1.1	Describe organisational guidelines and procedures for telecommunication equipment use			
		1.2	Explain how to operate telecommunication equipment in line with organisational requirements			
		1.3	Explain the importance of speaking clearly when dealing with customers by telephone			
		1.4	Describe the effects of smiling and other facial expressions that can be detected during calls			
		1.5	Describe how to identify the caller's name and needs			
		1.6	Describe how to identify customer problems			
		1.7	Explain the importance of adapting speech to meet customer needs			
		1.8	Identify what information to note from a customer telephone conversation following organisational guidelines			
		1.9	Describe organisational guidelines and procedures for what should be said during telephone conversations with customers			
		1.10	Describe the types of information that could affect confidentiality and security			
		1.11	Describe organisational call handling confidentiality and security requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		1.12	Explain the importance of not talking across an open line			
		1.13	List details to include when taking a message for a colleague			
		1.14	Describe organisational guidelines and procedures for taking action to follow up calls made to customers			
		1.15	Describe organisational guidelines for handling abusive calls			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand how to transfer business customer calls	2.1	Explain how to operate organisational equipment to transfer a customer call			
		2.2	Describe ways of identifying the appropriate person to whom a call is transferred			
		2.3	Describe the information to be given when transferring calls and leaving messages following organisational requirements			
3	Be able to receive business customer calls	3.1	Operate telecommunication equipment in line with organisational requirements			
		3.2	Speak clearly and adapt speech to meet the individual needs of a customer			
		3.3	Collect required information from the customer			
		3.4	Select information to record and store following organisational guidelines			
		3.5	Update customer records to reflect the key points of the conversation following organisational guidelines			
4	Be able to establish rapport with business customers who are calling	4.1	Greet customers following organisational guidelines			
		4.2	Give a positive image of self and organisation			
		4.3	Identify the reason for calling and the outcome required			
		4.4	Confirm the identity of customers following organisational guidelines			
		4.5	Use questions to clarify customer's requests			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to deal with business customer questions and requests	5.1	Identify all options available to respond to customers			
		5.2	Assess the benefits and drawbacks of each available response option			
		5.3	Follow organisational requirements for information confidentiality and security when providing information			
		5.4	Choose the option to lead to customer satisfaction within the products and services offer			
		5.5	Give clear and concise information to customers in response to questions and requests			
		5.6	Use questions and answers to control the length of conversations			
		5.7	Keep customers regularly informed about actions when calls are to be on hold for a period of time whilst information is accessed to provide responses			
		5.8	Summarise call outcomes and actions for call participants			
		5.9	Check before calls are finished that customers are content that all needs have been dealt with			
		5.10	Complete follow up actions agreed during calls			
		5.11	Take clear messages for colleagues if unable to deal with some aspect of the customer's needs			
		5.12	Check that promises to call back are kept			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 12: Communicate with business customers in writing**

**Unit reference number: A/505/4514**

**Level: 3**

**Credit value: 3**

**Guided learning hours: 20**

---

### **Unit aim**

There are various ways to communicate with business to business customers in writing, e.g. by post, using email, SMS (short messaging service) and MMS (multimedia messaging service). In this unit learners will demonstrate that they are able to meet their organisation's requirements for communicating in writing with customers using various means for the transmission of the communication.

### **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

The learner must demonstrate a minimum of two of the following means of transmitting written messages to customers:

- Post
- Email
- SMS
- MMS

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to deal with business customers in writing	1.1	Explain the importance of using clear and concise language			
		1.2	Explain the significance and risks involved in committing communications to a permanent record format			
		1.3	Describe the effects of style and tone on the reader of written communications			
		1.4	Explain the importance of adapting language to meet individual customer needs			
		1.5	Describe organisational guidelines and procedures for written communications			
		1.6	Describe organisational guidelines to stay safe and respect others when using software tools			
		1.7	Explain how to operate organisational equipment to produce and send written communications			
		1.8	Explain the importance of keeping customers informed when communication response is delayed			
		1.9	Explain the risks associated with the confidentiality of written communications			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to communicate in writing with business customers	2.1	Communicate with customers in line with organisational customer service timescale			
		2.2	Use clear and concise language			
		2.3	Adapt language use to meet individual customer needs			
		2.4	Ensure that style and tone of written communications follow organisational customer service requirements			
3	Be able to plan and send written communications to business customers	3.1	Anticipate customer expectations taking account of previous exchanges			
		3.2	Assemble all information needed to construct written communications			
		3.3	Plan the objective of written communications			
		3.4	Format written communications following organisational guidelines			
		3.5	Open written communications positively to establish customer rapport			
		3.6	State the purpose of written communications as early as possible			
		3.7	Summarise the key point of written communications			
		3.8	Summarise actions to be taken as a result of the written communication			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to handle incoming written communications from business customers	4.1	Identify the reasons for customer contact from written communications			
		4.2	Identify customer requirements from written communications			
		4.3	Identify all customer response options available			
		4.4	Identify the benefits and drawbacks of each response option			
		4.5	Provide customer requirements within the scope of the organisational product and service offer			
		4.6	Summarise actions to be taken			
5	Be able to use software tools and techniques to compose and send messages to business customers	5.1	Organise contact information held electronically in line with organisational requirements			
		5.2	Use organisational software tools to compose and format messages, including attachments			
		5.3	Follow organisational requirements and procedures for using software tools			
		5.4	Determine message size			
		5.5	Determine how to reduce the message size			
		5.6	Send electronic messages to individuals and groups			
		5.7	Respond to electronic messages in line with organisational requirements			
		5.8	Use software tools and techniques to automate responses			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 13: Sell face to face in a business to business workplace**

**Unit reference number: F/505/4515**

**Level: 2**

**Credit value: 4**

**Guided learning hours: 25**

---

### **Unit aim**

Face to face selling is one of the ways in which sales are generated. In this unit, the learner will demonstrate that they understand the requirements for selling face to face in a business to business workplace. They will show that they are able to prepare for, conduct and close a sale in a face to face sales situation in their organisation. They will also show that they are able to deal with customer objections within the constraints of their organisation's customer products and services offer.

### **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Learner evidence for how 'types of selling techniques' can be applied in face to face situations must include a minimum of cross selling, up selling and the sale of add-ons.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to sell face to face to business customers	1.1	Explain the differences between proactive and reactive selling			
		1.2	Explain how the types of selling techniques are applied in face to face selling situations			
		1.3	Describe the types of listening and questioning techniques used for selling in face to face situations			
		1.4	Explain how to interpret types of non-verbal behaviour			
		1.5	Describe the differences between product and service benefits and features			
		1.6	Describe the methods used to sell products and services benefits			
		1.7	Explain how to involve the prospect in reaching solutions to sales problems			
2	Be able to prepare for the sale to business customers	2.1	Select resources to be used during contact with the customer			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to conduct face to face sales meetings with business customers	3.1	Follow personal presentation organisational requirements when meeting customer			
		3.2	Work within the social and cultural constraints of the organisation and customers			
		3.3	Adapt behaviour to meet customer needs			
		3.4	Identify customer requirements through the use of questioning and active listening techniques			
		3.5	Confirm requirements by summarising customer buying needs and interests			
		3.6	Identify the products and services which match customer needs			
		3.7	Confirm with customers that the products and services are suitable			
		3.8	Communicate unique selling points of the products and services to customers			
		3.9	Provide customers with opportunities to discuss and assess products and services features and benefits			
		3.10	Act on customer buying signals to progress the sale			
		3.11	Provide customers with information to support product and service promotion			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to deal with sales objections during face to face sales	4.1	Identify sales objections prior to dealing with the customer			
		4.2	Clarify customer objections			
		4.3	Identify potential sales opportunities			
		4.4	Amend the offer to meet customer requirements			
		4.5	Resolve customer product and service queries			
		4.6	Confirm with customers that objections have been overcome			
5	Be able to close business customer sales	5.1	Gain a commitment from customers to close the sale			
		5.2	Complete the sales formalities following organisational procedures			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# **Unit 14: Develop working relationships with colleagues in a business to business workplace**

**Unit reference number: J/505/4516**

**Level: 2**

**Credit value: 1**

**Guided learning hours: 10**

---

## **Unit aim**

In this unit the learner will demonstrate that they understand the benefits of productive working relationships with their colleagues, demonstrate how they establish productive working relationships and resolve potential work-related difficulties and conflicts of interest in their place of work.

## **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the benefits of working with work colleagues	1.1	Describe the benefits of productive working relationships			
2	Be able to establish working relationships with colleagues	2.1	Identify organisational colleagues with whom working relationships are required			
		2.2	Agree roles and responsibilities with colleagues			
3	Be able to act in a professional and respectful manner when working with work colleagues	3.1	Use behaviour that shows professionalism and respect when working with colleagues			
4	Be able to communicate with work colleagues	4.1	Provide clear and concise information to colleagues			
		4.2	Use techniques to check and clarify understanding of information provided by colleagues			
5	Be able to identify potential work-related difficulties and explore solutions in a business to business workplace	5.1	Identify potential work related difficulties			
		5.2	Explain how to resolve identified potential difficulties			
		5.3	Identify potential work related conflicts of interest			
		5.4	Explain how to resolve work-related conflicts of interest			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 15: Manage personal workskills development in a business to business workplace

**Unit reference number:** L/505/4517

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 20

---

## Unit aim

In this unit the learner will agree their work performance requirements, how to measure progress against the objectives set, identify their skills and knowledge gaps, carry out and assess the outcomes of their development plan.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace. All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to agree performance requirements within a role in a business to business workplace	1.1	Agree work role performance requirements with line manager			
2	Be able to measure and progress against objectives in a business to business workplace	2.1	Agree ways that progress against work objectives will be measured with line manager			
3	Be able to identify gaps in personal skills, knowledge and performance in a business to business workplace	3.1	Explain the knowledge and skills required for work role			
		3.2	Identify gaps in knowledge and skills requirements for work role			
		3.3	Identify opportunities and resources available for personal knowledge and skills development			
		3.3	Identify opportunities and resources available for personal knowledge and skills development			
		3.4	Produce a development plan to address personal development needs			
		3.5	Plan development activities that address development plan needs			
		3.6	Agree the personal development plan and activities with line manager			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to carry out and assess activities within a personal development plan	4.1	Be able to carry out and assess activities within own development plan			
		4.2	Assess the success of activities carried out as part of the development plan			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## Unit 16: Keep stock at required levels in trade business operations

**Unit reference number:** R/505/4518

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 12

---

### Unit aim

In this unit the learner will show their understanding of and demonstrate their skills in relation to maintaining stock in trade business contexts to meet organisational requirements.

### Unit assessment requirements/evidence requirements

**This unit is barred against *Unit 17: Check Stock Levels and Stock Records in Trade Business Operations*.**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to maintain required stock levels in trade business operations	1.1	Explain organisational policies and procedures for keeping stock at required levels in relation to: <ul style="list-style-type: none"> <li>- Health, safety and security</li> <li>- Legal requirements</li> <li>- Operating requirements</li> </ul>			
		1.2	Describe when to replenish stock according to organisational policy requirements			
		1.3	Describe how the regular and routine checks on stock levels are carried out according to organisational policy requirements			
		1.4	Explain the organisational procedure for dealing with damaged, faulty and out of date items			
		1.5	Describe the use of handling methods and equipment to move stock according to organisational procedures			
		1.6	Describe the organisational procedures for labelling			
		1.7	Identify the problems that can occur when maintaining stock levels			
		1.8	Explain how to deal with specific problems according to organisational policy and procedures			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to maintain stock at required levels in trade business operations	2.1	Check the required organisational stock level and actual stock level			
		2.2	Identify damaged and faulty items			
		2.3	Move the location of damaged and faulty items in line with organisational procedure			
		2.4	Replenish stock in line with organisational procedure			
		2.5	Label stock accurately according to organisational requirements			
		2.6	Position stock in correct locations for further use in line with organisational requirements			
		2.7	Update stock records after replenishing stock levels according to organisational requirements			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 17: Check stock levels and stock records in trade business operations

**Unit reference number:** Y/505/4519

**Level:** 2

**Credit value:** 3

**Guided learning hours** 10

---

## Unit aim

In this unit learners will demonstrate their knowledge of checking stock and stock records and demonstrate the application of this to stock checking and record keeping to meet trade business organisation requirements.

## Unit assessment requirements/evidence requirements

**This unit is barred against *Unit 16: Keep Stock at Required Levels in Trade Business Operations*.**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Know how to check stock levels and stock records for trade business operations	1.1	Explain organisational policies and procedures for checking stock levels and stock records that relate to: <ul style="list-style-type: none"> <li>- Health, safety and security</li> <li>- Environmental factors</li> <li>- Special requirements</li> <li>- Stock control systems</li> <li>- Reporting and recording systems</li> </ul>			
		1.2	Explain the purpose of a stock check			
		1.3	Explain the roles and responsibilities of staff involved with checking stock levels and stock records			
		1.4	Describe the format, structure and content of organisational requirements for stock check reporting			
		1.5	Explain how to identify discrepancies in stock figures and records			
		1.6	Identify common problems that can occur when checking stock levels and stock records			
		1.7	Explain the organisational procedure action required to deal with identified problems			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to check stock levels and stock records for trade business operations	2.1	Carry out the checking of stock levels following organisational procedures			
		2.2	Record the results of the stock check to meet organisational requirements			
		2.3	Check findings against stock level records			
		2.4	Check for discrepancies			
		2.5	Disseminate information to relevant people to meet organisational requirements			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 18: Process business customer payments

**Unit reference number:** R/505/4521

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 20

---

## Unit aim

In this unit the learner will show their understanding of legal and the organisation's responsibilities when processing business customer payments. The learner will also demonstrate the processing of business customer payments within the customer service framework requirements of their organisation.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand legal and organisational responsibilities for processing business to business customer payments	1.1	Explain customer rights in relation to the pricing of goods in a business to business context			
		1.2	Explain organisational duties and responsibilities in relation to the pricing of goods			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to process business customer payments for purchases	2.1	Resolve pricing problems by: <ul style="list-style-type: none"> <li>– Referring to reliable organisational pricing information</li> <li>– Seeking advice from organisational personnel who can provide clarification</li> </ul>			
		2.2	Advise customers of correct payment, including current special offers and discounts that apply			
		2.3	Process business customer payments in line with organisational procedures			
		2.4	Advise customers where payment cannot be accepted in accordance with organisational procedures			
		2.5	Offer additional services to customers			
		2.6	Treat customers in accordance with organisational requirements throughout the payment process			
		2.7	Acknowledge other customers who are waiting in accordance with organisational requirements			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 19: Process applications for business customer credit agreements

**Unit reference number:** Y/505/4522

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 20

---

## Unit aim

In this unit the learner will demonstrate that they are able to process applications for the business customer credit services offered by their organisation.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to process applications for business customer credit agreements	1.1	Explain the features and conditions of the available credit to customers in accordance with organisational requirements			
		1.2	Allow time and opportunities for customers to ask questions			
		1.3	Ask questions to confirm customer credit requirements			
		1.4	Complete documentation accurately in accordance with organisational requirements			
		1.5	Close the credit application process in line with organisation requirements			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 20: Process business customer sales orders**

**Unit reference number: D/505/4523**

**Level: 2**

**Credit value: 4**

**Guided learning hours: 25**

---

### **Unit aim**

This unit covers the processing of customer quotations, orders and transactions in a business to business organisation. In this unit the learner is required to understand how to and be able to process business customer quotations and orders. They also need to demonstrate the following up of sales order processing, making refunds, maintaining tills balances and the processing of account payments.

### **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to process business customer quotations	1.1	Explain how to process customer quotations following organisational requirements that: <ul style="list-style-type: none"> <li>- Provide customer information</li> <li>- Select products for order</li> <li>- Confirm prices</li> <li>- Review margins</li> <li>- Set required dates to meet customer expectations</li> </ul>			
		1.2	Use organisational electronic systems for communicating customer quotes to include: <ul style="list-style-type: none"> <li>- Reference to existing quotes and lead source</li> <li>- Follow-up dates</li> <li>- Expiry dates</li> <li>- Administration and filing of quotation</li> </ul>			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Understand how to process business customer orders	2.1	Explain the importance of sales order processing			
		2.2	Describe the organisational processes for customer orders			
		2.3	Describe the different payment methods accepted by the organisation			
		2.4	Describe the organisational service standards relating to customer sales order completion			
		2.5	Explain the importance of storing information securely to meet organisational requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to process business customer sales orders	3.1	Explain how to process customer and registered account sales orders			
		3.2	Identify customer sales order requirements			
		3.3	Confirm the availability of the products and services to customers			
		3.4	Provide accurate delivery, timing and price information to customers			
		3.5	Explain how to process customer sales orders that provide for: <ul style="list-style-type: none"> <li>- Accurate customer information</li> <li>- Selecting products for order, process order</li> <li>- Confirming prices</li> <li>- Reviewing margins</li> <li>- Payment methods</li> <li>- Confirming delivery date</li> <li>- Identifying lead times</li> <li>- Product status</li> <li>- New and old build sales</li> </ul>			
		3.6	Identify sundry changes			
		3.7	Use organisational electronic systems for communicating sales including: <ul style="list-style-type: none"> <li>- the administration of sales orders</li> <li>- the filing of sales orders</li> </ul>			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		3.8	Check sale authorisation follows organisational procedures		
		3.9	Finalise the transaction in accordance with organisational procedures		
		3.10	Check customer is aware of the terms and conditions of sale		
		3.11	Check customer requirements are communicated to staff responsible for fulfilling customer sales orders		
		3.12	Identify how to access organisational support for customer sales order processing problems		

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to follow up business customer sales order processing	4.1	Keep customers informed of sales order progress			
		4.2	Advise customers of current discounts and special offers			
		4.3	Check information is stored securely in line with organisational requirements			
5	Be able to process business customer refunds	5.1	Explain how to process refunds for: <ul style="list-style-type: none"> <li>- Credit accounts original order</li> <li>- Confirmation of payment and refund amounts</li> </ul>			
		5.2	Use organisational electronic systems for the administration of refunds			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Be able to maintain till balances in a business to business context	6.1	Explain how to: <ul style="list-style-type: none"> <li>- Check and add float</li> <li>- Maintain till drawer limit</li> <li>- Transfer values between tills</li> <li>- Use correct method of payment adjustments</li> <li>- Check and close till</li> <li>- Make transfers to banking</li> <li>- Close banking</li> <li>- Paperwork administration</li> <li>- Complete bank slips and PO collection bags</li> <li>- Understand safe limits</li> </ul>			
		6.2	Investigate till errors			
		6.3	Correct till errors			
7	Be able to process business customer account payments	7.1	Explain how to: <ul style="list-style-type: none"> <li>- Complete the application form</li> <li>- Obtain ID</li> <li>- Confirm payment method</li> <li>- Process negative payments</li> <li>- Provide account management reports, customer statements and remittances</li> </ul>			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 21: Process business expense payments

**Unit reference number:** H/505/4524

**Level:** 2

**Credit value:** 1

**Guided learning hours:** 8

---

## Unit aim

In this unit the learner will demonstrate that they are able to process expense payments in line with the requirements of their organisation.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to process business to business organisation branch expenses payments	1.1	Explain how to: <ul style="list-style-type: none"> <li>- Maintain Petty Cash limits</li> <li>- Set frequency of expense payments</li> <li>- Justify adjustments</li> <li>- Ensure VAT accuracy</li> <li>- Operate signatory and receipt requirement rules</li> <li>- Complete paperwork administration</li> <li>- Correct errors</li> </ul>			
		1.2	Process business travel expense claims in line with organisational policy and procedures			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*



Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the relationship between trade business needs and the design process	1.1	Explain the features of the design supply chain			
		1.2	Explain how the trade business context impacts on the design process			
		1.3	Describe how to relate the design process to trade business needs			
2	Understand how different ownership rights impact on the trade business design process	2.1	Explain how copyright, moral rights and intellectual property rights impact on the design process			
3	Know the key features and steps in the trade business design process from concept to review	3.1	Describe the key features of the design process			
		3.2	Explain how creative thinking techniques are used to generate ideas in a trade business design workplace			
		3.3	Describe the purpose of using prototypes, proofs and mock-ups in the design process			
		3.4	Describe potential sources of information for new ideas, relevant to a specific design process			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 23: Application of techniques for the design of trade business products

**Unit reference number:** T/505/4527

**Level:** 2

**Credit value:** 3

**Guided learning hours:** 21

---

## Unit aim

In this unit the learner will show their understanding of the formal elements and principles of design, know how to apply techniques, materials, tools and equipment to design and manufacture in the trade business workplace and demonstrate they are able to adopt the preferred approach to the requirements of the design brief.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

For assessment criterion 1.2 learners must reference to the work of a minimum of two major designers.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the formal elements and principles of design	1.1	Give examples of how formal elements and principles are applied in the design of trade business products: <ul style="list-style-type: none"> <li>- Balance</li> <li>- Proportion</li> <li>- Rhythm</li> <li>- Emphasis</li> <li>- Unity</li> </ul>			
2	Know how to apply common techniques, materials, tools and equipment to trade business design and manufacture	2.1	Describe common techniques and materials, used in trade business design and manufacture			
		2.2	Give examples of common tools and equipment used in trade business design and manufacture			
		2.3	Describe the physical properties and capabilities of materials, tools and equipment used in trade business design and manufacture			
		2.4	Describe the potential of different material characteristics to achieve different effects			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to adopt the preferred approach based on the requirements of the trade business design brief	3.1	Document a planned design approach			
		3.2	Use a selected technique to make a trade business product ensuring consistency with a selected approach and a brief			
		3.3	Present a designed trade business product in accordance with a brief specification			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 24: Research and apply techniques for trade business customer design plans

**Unit reference number:** F/505/4529

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 15

---

## Unit aim

In this unit the learner must demonstrate that they are able to produce a plan to interpret a design brief using CAD (computer aided design) and adopt the preferred approach based on trade business customer brief requirements.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace. All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to produce a plan which interprets a trade business design brief	1.1	Correctly interpret the design brief specifications			
		1.2	Source information for the trade business design brief			
		1.3	Evaluate information for the trade business design brief			
		1.4	Identify resources required for the design of the trade business product			
		1.5	Produce a preliminary visual representation of the trade business design brief			
2	Be able to adopt the preferred approach based on the requirements of the trade business customer brief	2.1	Document the planned design approach following organisational requirements			
		2.2	Present the CAD design in accordance with the customer brief and organisation requirements			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

# Unit 25: Determine trade business customer design brief requirements

**Unit reference number:** T/505/4530

**Level:** 2

**Credit value:** 2

**Guided learning hours:** 14

---

## Unit aim

In this unit the learner will demonstrate their understanding of the importance of trade business customer requirements to the design brief and the use of these in determining the design brief requirements.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace. All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the importance of trade business customer requirements to the design brief	1.1	Explain why trade business customer requirements must be met			
		1.2	Describe the type of customer information required to develop a design brief following organisational requirements			
		1.3	Describe the importance of a design brief in the trade business design process			
2	Be able to determine the trade business design brief requirements	2.1	Identify the customer expectations within a trade business design brief			
		2.2	Explain what the design solution must achieve			
		2.3	Identify the parameters and limitations in a trade business design brief			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 26: Use database software in a business to business organisation**

**Unit reference number: A/505/4531**

**Level: 2**

**Credit value: 4**

**Guided learning hours: 30**

---

### **Unit aim**

In this unit the learner will show their skills in working with databases in a business to business workplace. This includes creating and modifying non-relational databases, entering, editing and organising information and use of software tools to run queries and produce reports.

### **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to create and modify non-relational database tables for business to business workplace needs	1.1	Identify components of a database design			
		1.2	Describe field characteristics for the data required			
		1.3	Create database tables using a range of field types			
		1.4	Modify database tables using a range of field types			
		1.5	Describe ways to maintain data integrity			
		1.6	Respond to database table problems			
		1.7	Use database tools and techniques to maintain data integrity			
2	Be able to enter, edit and organise structured information in a database to meet business to business workplace needs	2.1	Create forms to enter, edit and organise data in a database to meet business needs			
		2.2	Format data entry forms using tools and techniques to meet business needs			
		2.3	Use IT tools to check data entry meets business needs			
		2.4	Make corrections to data entry errors			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to use database software tools to run business queries and produce business reports	3.1	Create and run database queries using multiple criteria to display and amend selected data			
		3.2	Plan and produce database business reports from a single table non-relational database			
		3.3	Select and use tools and techniques to format business database reports			
		3.4	Use IT tools to check reports meet business needs			
		3.5	Use IT tools to make corrections as necessary			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

*(if sampled)*

## **Unit 27: Use imaging software in a business to business organisation**

**Unit reference number: F/505/4532**

**Level: 2**

**Credit value: 4**

**Guided learning hours: 30**

---

### **Unit aim**

In this unit the learner will demonstrate that to meet business to business organisation workplace needs they are able to obtain, insert and combine images and use imaging software tools to create, manipulate and edit images.

### **Unit assessment requirements/evidence requirements**

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, trade business organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to obtain, insert and combine information for images used in a business to business workplace	1.1	Describe images required for use in the business context			
		1.2	Obtain, input and prepare images to meet business customer needs			
		1.3	Describe copyright constraints and organisational requirements for the use of images			
		1.4	Use techniques to organise types and sources of information			
		1.5	Use techniques to combine types and sources of information			
		1.6	Describe the context in which images will be used			
		1.7	Describe what file format to use for saving images to suit different presentation methods			
		1.8	Store files in line with organisational guidelines and convention requirements			
		1.9	Retrieve files in line with organisational guidelines and convention requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to use imaging software tools to create, manipulate and edit images in a business to business workplace	2.1	Identify what technical factors affect images used in business to business workplaces			
		2.2	Identify how to take into account factors affecting the selected images			
		2.3	Select techniques to create images			
		2.4	Use techniques to create images			
		2.5	Use guide lines and dimensioning tools to enhance precision			
		2.6	Select image manipulation and editing tools and techniques to meet organisational requirements			
		2.7	Use image manipulation and editing tools and techniques			
		2.8	Check images meet needs			
		2.9	Select IT tools to make corrections			
		2.10	Use IT tools to make corrections			
		2.11	Identify image quality problems			
		2.12	Rectify image quality problems			

Learner name: \_\_\_\_\_

Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_

Date: \_\_\_\_\_

Internal verifier signature: \_\_\_\_\_

Date: \_\_\_\_\_

(if sampled)

# Unit 28: Use spreadsheet software in a business to business organisation

**Unit reference number:** J/505/4533

**Level:** 2

**Credit value:** 4

**Guided learning hours:** 20

---

## Unit aim

In this unit the learner will use their organisation's spreadsheet software to demonstrate they are able to enter, edit and organise numerical and other data and select and use formula and data analysis tools. They will also demonstrate they are able to select and use tools and techniques to present and format spreadsheets.

## Unit assessment requirements/evidence requirements

This unit must be evidenced using naturally occurring evidence from the workplace.

All assessment criteria must be fully met.

Workplace assessment of occupational competence is required. Assessors must hold the current qualification for assessors of competence based qualifications and internal verifiers must hold the current qualification for internal verification of competence based qualifications. Where assessors and internal verifiers are accredited with older versions of these qualifications they must demonstrate that their practice meets that required in the current standards.

Where line managers carry out the assessment or internal verification roles, organisations may, with the agreement of Pearson choose between:

a) achieving the appropriate regulatory authority approved qualifications as outlined above for assessment and internal verification

OR

b) demonstrating that training and development activity undertaken by the trade business employer to prepare, validate and review these assessment/verification roles, maps 100% to the National Occupational Standards on which these qualifications are based. The mapping process must be agreed by Pearson as providing the equivalent level of rigour and robustness as the achievement of the qualification.

The alternative option described in (b) above, which waives the need for the regulatory approved units for assessment and internal verification activities, must be applied on an 'organisation by organisation' and 'qualification by qualification' basis.

Prospective trade business organisations must be able to confirm that their in-house practices conform to the requirements of the NOS in association with Pearson prior to assessment activities commencing.

This unit is assessed in the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## 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 determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to use a spreadsheet to enter, edit and organise numerical and other data in a business to business workplace	1.1	Identify numerical and other information required in the spreadsheet			
		1.2	Determine the spreadsheet structure required to meet business needs			
		1.3	Enter numerical and other data to meet organisational requirements			
		1.4	Edit numerical and other data to meet organisational needs			
		1.5	Combine and link data across worksheets			
		1.6	Store and retrieve spreadsheet files in line with organisational guidelines and convention requirements			
2	Be able to select and use formulas and data analysis tools to meet business to business workplace requirements	2.1	Identify software tools and techniques to analyse and manipulate data to meet organisational requirements			
		2.2	Select functions and formulas to meet calculation requirements			
		2.3	Use functions and formulas to meet calculation requirements			
		2.4	Use software tools and techniques to analyse and manipulate data to meet organisational requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to select and use tools and techniques to present and format a spreadsheet for a business to business workplace	3.1	Plan how to present and format spreadsheet information to meet business needs			
		3.2	Select software tools and techniques to format spreadsheet cells, rows, columns and worksheets			
		3.3	Use software tools and techniques to format spreadsheet cells, rows, columns and worksheets			
		3.4	Select chart and graph type to display selected information			
		3.5	Format chart and graph type to display selected information			
		3.6	Select page layout to present			
		3.7	Use page layout to present			
		3.8	Print spreadsheet information			
		3.9	Check information meets business needs			
		3.10	Use spreadsheet tools to make corrections			
		3.11	Check for errors in spreadsheet formulas			
		3.12	Respond to spreadsheet problems in line with organisational requirements			

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](http://qualifications.pearson.com/en/support/contact-us.html)
- books, software and online resources for UK schools and colleges: [www.pearsonschoolsandfecolleges.co.uk](http://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](http://qualifications.pearson.com)

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

Pearson supports UK and international customers with training related to NVQ and BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

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

The national programme of training we offer can be viewed on our website ([qualifications.pearson.com](http://qualifications.pearson.com)). You can request customised training through the website or by contacting one of our advisers in the Training from Pearson team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

## 14 Contact us

We have a dedicated Account Support team, based throughout the UK, to give you more personalised support and advice. To contact your Account Specialist you can use any of the following methods:

**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 at:

**Email:** wbl@pearson.com

**Telephone:** 0844 576 0045

### Complaints and feedback

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

If you would like to register a complaint with us, please email [wblcomplaints@pearson.com](mailto:wblcomplaints@pearson.com).

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

## Annexe A: Realistic Working Environment

---

### **The use and application of simulation**

In broad terms, the retail sector holds the view that simulation is a practical and effective tool for establishing skill and understanding, where naturally occurring evidence of competence is unavailable or infrequent. However the sector feels that there is very little that can be assessed by simulation with the exception of:

- some aspects of Health & Safety and Security, and
- some basic functions that do not involve interaction with customers.

Skillsmart Retail requires that Awarding Organisations:

**a** Discourage the inappropriate use of competence-based qualifications by organisations that do not assess candidates in a working environment.

Competence-based qualifications are suitable only for learners who are in some form of employment in the sector, or, in a limited set of contexts, are being prepared for work and will be assessed in a realistic working environment (see section below for definition).

**b** Establish criteria to ensure that simulation is not used as the sole form of evidence for any unit of a competence-based qualification, except where allowed for specific units that meet the criteria set out above. This should be expressed in guidance for qualifications operating in the sector.

**c** Provide clear guidance to centres to indicate that evidence towards a competence-based qualification should come from the workplace except where simulation is expressly allowed in the evidence requirements for a particular unit. Workplace evidence may be gathered in the context of full, part-time, casual or voluntary employment. Assessment may be undertaken in a 'work placement' (i.e. full-time students placed into a working environment for a day per week) although supporting evidence from a supervisor or manager, associated with some form of work activity, must supplement the assessment process.

### **Use of simulation as an assessment method**

Assessment for competence-based units must always be carried out in a retail environment except where a Realistic Working Environment is permitted for simulation. Simulation is allowed only where:

- the assessment criteria require the learner to respond to an emergency;
- a unit covers a limited selection of basic functions which need not involve interacting with customers;
- a unit originates from another SSC or SSB and the originator expressly allows simulation to be used for that unit.

### **Definition of a Realistic Working Environment (RWE)**

Where simulation is used the sector requires that:

**a** Simulation must be undertaken in a Realistic Working Environment

**b** Awarding Organisations provide guidance for centres that requires that Realistic Working Environments:

‘provide an environment that replicates the key characteristics of the workplace in which the skill to be assessed is normally employed’.

A Realistic Working Environment (for the purpose of simulated work activities) is regarded as one that replicates a real working environment. For example, a college shop that operates on a commercial basis (i.e. it has a profit and loss account) is acceptable for retail environments but a shop laid out in a classroom environment is not. However, in order to prevent any barriers to achievement, simulated activity may be used for assessment purposes within a real working environment.

# Annexe B: Personal, Learning and Thinking Skills (PLTS) Mapping

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

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

**October 2017**

**For information about Edexcel, BTEC or LCCI qualifications visit [qualifications.pearson.com](http://qualifications.pearson.com)**

**BTEC is a registered trademark of Pearson Education Limited**

**Pearson Education Limited. Registered in England and Wales No. 872828  
Registered Office: 80 Strand, London WC2R 0RL.  
VAT Reg No GB 278 537121**