Pearson Edexcel Level 2 NVQ Certificate in Sales

Specification

Competence-based qualification

For first registration April 2011

Issue 2

Edexcel, BTEC and LCCI qualifications

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

About Pearson

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

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

This qualification was previously known as:

Edexcel Level 2 NVQ Certificate and Diploma in Sales (QCF)

The QN remains the same.

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

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

ISBN 9781446949405

Summary of Pearson Edexcel Level 2 NVQ Certificate in Sales Issue 2 changes

Summary of changes made between previous Issue 1 and this current Issue 2	Page Number
All references to QCF have been removed throughout the specification with the exception of documents from other organisations eg Assessment Guidance in an Annexe	Throughout
Definition of TQT added	1
Definition of sizes of qualifications aligned to TQT	2
TQT value added	4
QCF references removed from unit titles and unit levels in all units	12-95

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

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

Contents

Introducing Pearson NVQ/Competence-based qualifications

What are NVQ/Competence-based qualifications?

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

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

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

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

Sizes of NVQ/Competence-based qualifications

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

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

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

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

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

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

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

•

Qualification title covered by this specification

This specification gives you the information you need to offer the Pearson Edexcel Level 2 NVQ Certificate in Sales:

Qualification title	Qualification Number (QN)	Accreditation start date
Pearson Edexcel Level 2 NVQ Certificate in Sales	600/1159/2	01/04/2011

You should use the Qualification Number (QN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique reference number, which is listed in this specification.

The qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

Key features of the Pearson Edexcel Level 2 NVQ Certificate in Sales

This qualification:

- is nationally recognised
- is based on National Occupational Standards (NOS). The NOS, assessment strategy and qualification structures are owned by the Council for Administration (CfA).

The Pearson Edexcel Level 2 NVQ Certificate in Sales has been approved as a component for the Sales Apprenticeship framework.

What is the purpose of this qualification?

This qualification is designed for people who work in a sales environment, either in sales roles or performing sales functions, and who have direct contact with customers.

The qualification covers a range of functions including developing a sales strategy, managing sales territories and teams, and face-to-face and telephone selling.

Who is this qualification for?

This qualification is for all learners aged 14 and above who are capable of reaching the required standards.

Pearson's policy is that the qualifications should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualifications.

What are the benefits of this qualification to the learner and employer?

This qualification allows learners to demonstrate competence against National Occupational Standards which are based on the needs of the sales sector as defined by the Council for Administration (CfA), the Sector Skills Council. As such it contributes to the development of skilled labour in the sector. This qualification may contribute towards the competence element of an apprenticeship.

What are the potential job roles for those working towards this qualification?

- Business development officer/executive
- Customer sales adviser
- Customer service adviser/team leader
- Junior sales executive/manager
- Customer relationship manager
- Membership sales adviser/consultant
- New business executive
- Telesales executive/professional
- Sales team leader
- Key account manager

What progression opportunities are available to learners who achieve this qualification?

On the successful completion of the Pearson Edexcel Level 2 NVQ Certificate in Sales learners can progress within employment or on to Level 3 qualifications such as the:

- Pearson Edexcel Level 3 NVQ Certificate and Diploma in Sales
- Pearson Edexcel Level 3 NVQ Diploma in Customer Service
- Pearson Edexcel Level 3 NVQ Certificate in Management
- Pearson Edexcel BTEC Level 3 Diploma in Business
- Pearson Edexcel GCE in Applied Business.

Further information is available in *Annexe A*.

What is the qualification structure for the Pearson Edexcel Level 2 NVQ Certificate in Sales?

Individual units can be found in the *Units* section.

To achieve the Pearson Edexcel Level 2 NVQ Certificate in Sales learners must achieve a minimum of 22 credits. They must complete the three mandatory units in Group A (nine credits) and achieve a minimum of four credits from the Group B optional units. The remaining credit must be completed from Group B and Group C.

The Total Qualification Time (TQT) for this qualification is 220.

Please note that J/502/8577 and J/502/8580 is a barred combination.

Group A – mandatory units

Unit reference number	Unit title	Credit value	Level
F/502/8559	Time Planning in Sales	2	2
A/502/8561	Complying with Legal, Regulatory and Ethical Requirements in a Sales or Marketing role	2	2
J/601/1210	Deliver Reliable Customer Service	5	2

Group B – optional units

Unit reference number	Unit title	Credit value	Level
L/502/8564	Selling Face-to-face	4	2
J/502/8577	Selling by Telephone (Inbound)	4	2
J/502/8580	Selling by Telephone (Outbound)	4	2

Group C – optional units

Unit reference number	Unit title	Credit value	Level
D/502/8584	Inputting and Accessing Sales or Marketing Data in information Systems	2	2
M/502/8587	Processing Sales Orders	2	2
T/502/8588	Preparing and Delivering a Sales Demonstration	3	2
J/502/8594	Selling at Exhibitions	5	2
L/502/8595	Monitoring Sales Deliveries	2	2
Y/502/8597	Supporting Customers in Obtaining Finance for Purchases	3	2
H/502/8599	Generating and Qualifying Sales Leads	2	2
R/502/8601	Meeting Customers' After-sales Needs	3	2
R/502/8615	Obtaining and Analysing Sales-related information	4	3
H/502/8618	Obtaining and Analysing Competitor information	3	3
K/502/8622	Buyer Behaviour in Sales Situations	3	3
T/502/8624	Communicating Using Digital Marketing/Sales Channels	4	3
F/600/9469	Manage Personal Development	4	2
H/600/9688	Participate in Meetings	2	2
H/600/9724	Communicate Information and Knowledge	3	2

How is the qualification graded and assessed?

The overall grade for the qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

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

The qualification is designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment strategy for the sector, or
- as part of a training programme.

Assessment strategy

The assessment strategy for this qualification has been included in *Annexe C*. It has been developed by the Council for Administration (CfA) in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment strategy includes details on:

- criteria for defining realistic working environments
- roles and occupational competence of assessors, expert witnesses, internal verifiers and standards verifiers
- quality control of assessment
- evidence requirements.

Evidence of competence may come 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/training 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 learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

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

Types of evidence (to be read in conjunction with the assessment strategy in *Annexe C*)

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment strategy for information about which of the following are permissible.

- 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, where permitted by the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EPW)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Pearson standards verifier. A range of recording documents is available on the Pearson website qualifications.pearson.com. Alternatively, centres may develop their own.

Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given ‘automatic approval’ for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Pearson approval are able to gain qualification approval for a different level or different sector via Edexcel online.

Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes 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.

Quality assurance

Detailed information on Pearson’s quality assurance processes is given in *Annexe A*.

What resources are required?

This qualification is designed to support learners working in the sales sector. Physical resources need to support the delivery of the qualification and the assessment of the learning outcomes and must be of industry standard. Centres must meet any specific resource requirements outlined in *Annexe C: Assessment strategy*. Staff assessing the learner must meet the requirements within the overarching assessment strategy for the sector.

Unit format

Each unit in this specification contains the following sections.

Unit title:

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

Unit reference number:

This is the unit owner's reference number for the specified unit.

Level:

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

Credit value:

All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.

Guided learning hours:

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

Unit summary:

This provides a summary of the purpose of the unit.

Assessment requirements/evidence requirements:

The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.

Assessment methodology:

This provides a summary of the assessment methodology to be used for the unit.

Learning outcomes:	Assessment criteria:	Evidence type:	Portfolio reference:	Date:
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.

Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.

Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.

Units

Unit 1: Time Planning in Sales

Unit reference number: F/502/8559

Level: 2

Credit value: 2

Guided learning hours: 13

Unit summary

This unit aims to develop knowledge, understanding and skills in planning and evaluating time management in a sales role.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to manage and prioritise time in a sales role	1.1	explain the importance of time management and its impact on sales objectives			
		1.2	describe how a sales team member uses and measures the use of time			
		1.3	describe best practice time management techniques			
		1.4	explain how to review the use of time spent on sales activities			
2	Be able to plan own time in a sales role	2.1	identify own long-term sales commitments and immediate goals			
		2.2	identify work-related priorities			
		2.3	identify the differences between tasks that are urgent and tasks that are important			
		2.4	consolidate tasks to reduce workload and time wastage			
		2.5	identify opportunities to gain support from others to complete work			
		2.6	develop a time plan or weekly schedule, prioritising all tasks in order of relative importance and urgency			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to evaluate time planning in a sales role	3.1	identify unnecessary tasks that are not directly related to own objectives			
		3.2	use feedback from colleagues to identify strengths and weaknesses in the use of own time			
		3.3	identify productive periods of time			
		3.4	identify the opportunities for improving the use of time			

Learner name: ________________________________ Date: ____________________

Learner signature: ____________________________ Date: ____________________

Assessor signature: ___________________________ Date: ____________________

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

Unit 2: Complying with Legal, Regulatory and Ethical Requirements in a Sales or Marketing Role

Unit reference number: A/502/8561

Level: 2

Credit value: 2

Guided learning hours: 13

Unit summary

This unit aims to support learners in understanding and adhering to organisational legal, regulatory and ethical requirement.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the legal, regulatory and ethical requirements in a sales or marketing role	1.1 explain the legal requirements of a sales or marketing role 1.2 explain the regulatory requirements of a sales or marketing role 1.3 explain the ethical requirements of a sales or marketing role 1.4 state organisational procedures for raising legal, regulatory and ethical concerns relating to a sales or marketing role 1.5 identify to whom non-compliance issues should be referred 1.6 explain when and how to refer legal, regulatory and ethical concerns to others 1.7 describe the possible consequence of non-compliance with legal, regulatory or ethical requirements			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to comply with organisational policies and procedures for legal, regulatory and ethical requirements in a sales or marketing role	2.1	behave in a way that meets organisational ethical procedures, policies and standards			
		2.2	identify areas where legal, regulatory or ethical issues may arise			
		2.3	obtain advice on matters where legal, regulatory or ethical issues might exist			
		2.4	work within the limits of responsibility and authority in a sales or marketing role			
		2.5	report issues, problems and actions relating to legal, regulatory or ethical matters in the agreed format			

Learner name: ____ Date: ______________________________

Learner signature: ____________________________________ Date: ______________________________

Assessor signature: ___________________________________ Date: ______________________________

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

Unit 3: Deliver Reliable Customer Service

Unit reference number: J/601/1210

Level: 2

Credit value: 5

Guided learning hours: 33

Unit summary

This unit is about how the learner delivers consistent and reliable service to customers. As well as being good with people, the learner needs to work with their organisation's service systems to meet or exceed customer expectations. In the learner's job there will be many examples of how they combine their approach and behaviour with their organisation's systems. The learner will need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what they have done has met customer expectations. To meet this standard they have to deliver excellent customer service over and over again.

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Prepare to deal with customers	1.1 keep their knowledge of their organisation's services or products up to date 1.2 ensure that the area they work in is tidy, safe and organised efficiently 1.3 prepare and arrange everything they need to deal with customers before their shift or period of work commences			
2 Give consistent service to customers	2.1 make realistic customer service promises to customers 2.2 ensure that their promises balance the needs of their customers and their organisation 2.3 keep their promises to customers 2.4 inform their customers if they cannot keep their promises due to unforeseen circumstances 2.5 recognise when their customers' needs or expectations have changed and adapt their service to meet the new requirements 2.6 keep their customers informed if delivery of the service needs to involve passing them on to another person or organisation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Check customer service delivery	3.1	check that the service they have given meets their customers' needs and expectations			
		3.2	identify when they could have given better service to customers and how their service could have been improved			
		3.3	share information with colleagues and service partners to maintain and improve their standards of service delivery			
4	Know how to deliver reliable customer service	4.1	describe their organisation's services or products			
		4.2	explain their organisation's procedures and systems for delivering customer service			
		4.3	describe methods or systems for measuring an organisation's effectiveness in delivering customer service			
		4.4	explain their organisation's procedures and systems for checking service delivery			
		4.5	explain their organisation's requirements for health and safety in their area of work			

Learner name: ______________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: ______________________________ Date: ____________________

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

Unit 4: Selling Face-to-Face

Unit reference number: L/502/8564

Level: 2

Credit value: 4

Guided learning hours: 25

Unit summary

This unit aims to develop the knowledge and skills of selling to customers face-to-face, overcoming objections and closing the sale.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

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

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

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

Learner name: ____ Date: ______________________________

Learner signature: ____ Date: ______________________________

Assessor signature: ____ Date: ______________________________

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

Unit 5: Selling by Telephone (Inbound)

Unit reference number: J/502/8577

Level: 2

Credit value: 4

Guided learning hours: 27

Unit summary

This unit aims to provide the skills necessary for responding to inbound sales calls.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to sell by telephone (inbound)	1.1 describe the advantages and disadvantages of selling by inbound telephone sales calls 1.2 describe when the following techniques can be applied when selling by inbound telephone sales calls: cross-selling, up-selling and selling add-ons 1.3 describe the listening and questioning techniques used for selling during inbound telephone sales calls 1.4 describe the different methods used to sell benefits during inbound telephone sales calls			
2 Understand how to close the sale during inbound telephone sales calls	2.1 explain how to manage customer behaviour during inbound telephone sales calls 2.2 describe methods for closing sales during inbound telephone sales calls 2.3 explain how to evaluate and measure the success of inbound telephone sales calls 2.4 describe interactive ICT options available to support telephone sales activities			
3 Be able to prepare for the inbound telephone sales call	3.1 identify objectives for selling products and/or services by inbound telephone sales calls 3.2 organise materials for a call in accordance with the sales call plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to identify customer needs during inbound telephone sales calls	4.1	greet and respond to callers in accordance with organisational procedures			
		4.2	obtain information from customers about their needs			
		4.3	assess the potential value of calls and customers			
		4.4	identify products and/or services with features and functions that customers need or want			
		4.5	identify opportunities for further sales and/or sales of other products and/or services			
5	Be able to present products and/or services to the customer during inbound telephone sales calls	5.1	explain the benefits and features of products and/or services offered			
		5.2	interpret the customer's reaction and decide how to progress the sale			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
6	Be able to deal with sales objections during inbound telephone sales calls	6.1	identify sales objections prior to dealing with the customer			
		6.2	clarify objections and identify potential sales opportunities from them			
		6.3	deal with customer queries and objections with clear and accurate responses			
		6.4	resolve customer queries about the product and/or service			
		6.5	reassure the customer to confirm their objections have been overcome			
		6.6	develop a positive relationship with the customer and identify and pursue further customer contact			
7	Be able to close the sale during inbound telephone sales calls	7.1	perform a trial close to establish whether or not further objections exist			
		7.2	gain commitment from the customer to close the sale			
		7.3	complete the formalities of the sale following organisational procedures			
		7.4	provide customer feedback and reaction to products and/or services to appropriate people in own organisation			

Learner name: ______________________________________ Date: ________________________

Learner signature: ___________________________________ Date: ________________________

Assessor signature: __________________________________ Date: ________________________

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

Unit 6: Selling by Telephone (Outbound)

Unit reference number:	J/502/8580
Level:	2
Credit value:	4
Guided learning hours:	27

Unit summary

This unit aims to provide the skills necessary for conducting outbound sales calls.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to sell by telephone (outbound)	1.1 describe the advantages and disadvantages of selling by outbound telephone sales calls 1.2 describe when the following techniques can be applied when selling by outbound telephone sales calls: cross-selling, up-selling and selling add-ons 1.3 describe the listening and questioning techniques used for selling during outbound telephone sales calls 1.4 describe the different methods used to sell benefits during outbound telephone sales calls			
2 Understand how to close the sale during outbound telephone sales calls	2.1 explain how to manage customer behaviour during outbound telephone sales calls 2.2 describe methods for closing sales during outbound telephone sales calls 2.3 explain how to evaluate and measure the success of outbound telephone sales calls 2.4 describe interactive ICT options available to support telephone sales activities			
3 Be able to prepare for the inbound telephone sales call	3.1 identify objectives for selling products and/or services by outbound telephone sales calls 3.2 use agreed call lists or leads to plan sales calls 3.3 organise materials for the call in accordance with the sales call plan			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to identify customer needs during outbound telephone sales calls	4.1	assess the potential value of calls and customers			
		4.2	prioritise calls according to likely customer value and probability of closure			
		4.3	obtain information from customers about their needs			
		4.4	identify products and/or services with features and functions that customers need or want			
		4.5	identify opportunities for further sales and/or sales of other products and/or services			
5	Be able to present products and/or services to the customer during outbound telephone sales calls	5.1	explain the benefits and features of products and or services offered			
		5.2	interpret the customer's preferred solution and decide how to progress the sale			
6	Be able to deal with sales objections during outbound telephone sales calls	6.1	identify likely sales objections prior to dealing with the customer			
		6.2	clarify objections and identify potential sales opportunities from them			
		6.3	deal with customer queries and objections with clear and accurate responses			
		6.4	resolve customer queries about the product and/or service			
		6.5	reassure the customer to confirm their objections have been overcome			
		6.6	develop a positive relationship with customers and identify and pursue further customer contact			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
7	Be able to close the sale during outbound telephone sales calls	7.1	perform a trial close to establish whether or not further objections exist			
		7.2	gain a commitment from the customer			
		7.3	complete the formalities of the sale following organisational procedures			
		7.4	provide customer feedback and reaction to products or services to appropriate people in own organisation			

Learner name: ____ Date: ______________________________

Learner signature: _____________________________________ Date: ______________________________

Assessor signature: ____________________________________ Date: ______________________________

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

Unit 7:	**Inputting and Accessing Sales or Marketing Data in Information Systems**
Unit reference number:	D/502/8584
Level:	2
Credit value:	2
Guided learning hours:	15

Unit summary

This unit aims to provide the skills and knowledge required to input and access sales or marketing data and information.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to input and access sales or marketing data in information systems	1.1	explain the uses of ICT in the sales or marketing function			
		1.2	identify why information is needed for sales or marketing activities			
		1.3	describe how sufficient, valid and reliable sources of sales or marketing information can be gathered			
		1.4	explain the reasons for using an established data storage system			
		1.5	describe the role, advantages and disadvantages of manual and computerised systems			
		1.6	explain ways of classifying sales or marketing information and the protocol for data storage			
2	Understand the use of sales or marketing information sources and systems	2.1	explain methods of presenting sales or marketing information			
		2.2	describe the features of software and hardware used to manage sales or marketing information			
		2.3	describe how to plan and organise searches for sales or marketing information			
		2.4	explain the implications of entering incorrect sales or marketing data			
		2.5	explain why certain types of sales or marketing information are confidential			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.6 explain the scope of own authority and responsibility when using sales or marketing information and databases 2.7 explain the actions to be taken in the case of a breach of confidentiality			
3 Be able to input and use databases to support sales or marketing activities	3.1 gather sales or marketing information 3.2 identify potential information sources that are likely to support planned sales or marketing activities 3.3 follow organisational procedures to report concerns about security/confidentiality 3.4 use sales information gathered to support specified sales or marketing activities 3.5 input and update sales or marketing information on the database so that it can be accessed and used to support sales activities in the future			

Learner name: ________________________ Date: ____________________

Learner signature: ______________________ Date: ____________________

Assessor signature: _____________________ Date: ____________________

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

Unit 8: Processing Sales Orders

Unit reference number: M/502/8587

Level: 2

Credit value: 2

Guided learning hours: 17

Unit summary

The aim of this unit is to provide the skills and knowledge needed to process orders and payments.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to process and follow up sales orders	1.1	explain the importance of sales order processing			
		1.2	describe organisational processes for ordering products and/or services			
		1.3	describe different sources of information used to check customer credit			
		1.4	describe the different payment methods accepted by sales-orientated organisations			
		1.5	explain the role of the despatch function			
		1.6	describe service standards relating to sales order completion			
		1.7	explain the importance of storing information securely			
2	Be able to process sales orders	2.1	identify customer sales order requirements			
		2.2	check that the credit status of the customer meets organisational standards			
		2.3	confirm the availability of products and/or services to the customer			
		2.4	ensure that information given to the customer about delivery, timing and price is accurate			
		2.5	ensure that the sale is authorised following the organisation's procedures			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.6 finalise the transaction in accordance with organisational procedures 2.7 ensure that the customer is aware of the terms and conditions of sale 2.8 ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders 2.9 identify who to go to when in need of support with sales order processing problems			
3 Be able to follow up sales order processing	3.1 keep the customer informed of the sales order progress and any problems with the sale order 3.2 advise the customer of current discounts and special offers 3.3 check all information is stored securely			

Learner name: ______________________________ Date: ______________________

Learner signature: ______________________________ Date: ______________________

Assessor signature: ______________________________ Date: ______________________

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

Unit 9: Preparing and Delivering a Sales Demonstration

Unit reference number: T/502/8588

Level: 2

Credit value: 3

Guided learning hours: 20

Unit summary

The aim of this unit is to prepare for and provide creative, professional and inspiring demonstrations of organisation's products or services to customers.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to prepare and deliver a sales demonstration	1.1 explain how the demonstration will contribute to the achievement of business goals and objectives 1.2 describe the features and benefits of the products and services being demonstrated 1.3 explain how to provide demonstrations of products and services in a manner and style which is suitable to different audiences 1.4 explain the importance of rehearsing demonstrations 1.5 describe equipment and accommodation requirements of the demonstration			
2 Be able to prepare for a sales demonstration	2.1 identify the sales targets for own area of responsibility 2.2 identify customer needs and wants in relation to the products and/or services being demonstrated 2.3 agree the objectives, length, content and method of the demonstration and who will be present 2.4 identify resources for the demonstration and plan the demonstration in a structured way 2.5 anticipate problems, constraints or objections that could be raised in response to the demonstration and prepare possible responses 2.6 prepare supporting materials that are consistent with the demonstration			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to deliver a sales demonstration	3.1	promote the features and benefits of the products and/or services			
		3.2	deliver the demonstration in a style and manner that achieves the objectives and engages the audience			
		3.3	provide the customer/audience with opportunities to ask questions and raise objections			
		3.4	respond to questions and objections in a manner that is likely to further sales			
		3.5	gain commitment to progress or close the sale			
4	Be able to evaluate the sales demonstration	4.1	evaluate the sales demonstration against agreed objectives			
		4.2	provide feedback to colleagues to improve the planning of future demonstrations and/or to enhance products and/or services			

Learner name: ____ Date: ______________________________

Learner signature: _____________________________________ Date: ______________________________

Assessor signature: ____________________________________ Date: ______________________________

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

Unit 10: Selling at Exhibitions

Unit reference number:	J/502/8594
Level:	2
Credit value:	5
Guided learning hours:	28

Unit summary

The aim of this unit is to develop knowledge, understanding and sales skills in selling at trade fairs and exhibitions.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to assess the relevance of exhibitions for the organisation	1.1	explain the purpose of exhibitions, trade fairs and conferences and how they produce sales opportunities			
		1.2	identify which events are most appropriate to the industry/sector and organisation and explain why			
		1.3	explain the importance of the sales event to achieving organisational plans and targets			
		1.4	describe how to evaluate sales events and measure their overall success			
2	Understand how to prepare for and sell at exhibitions	2.1	describe how to prepare for exhibitions			
		2.2	explain the advantages and disadvantages of different methods and processes for collecting and recording sales leads information			
		2.3	explain the importance of following up leads after the event			
3	Be able to prepare for an exhibition	3.1	identify the targets for sales and potential sales during the exhibition or trade fair			
		3.2	provide information about the event that is attractive to customers			
		3.3	agree procedures for collecting names, addresses and business cards of potential customers attending the event			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.4 identify the dress code for the event 3.5 obtain up-to-date product literature and price lists 3.6 collect customer testimonials and case studies to support sales messages, for use at the event 3.7 identify target prospects from exhibition delegate lists 3.8 review other exhibitors before the event to determine whether own organisation's products or services complement or compete with other products or services 3.9 identify areas of compatibility and joint opportunities for the sale of add-ons, up-selling or cross-selling with other exhibitors before the event			
4 Be able to sell at an exhibition	4.1 use verbal and non-verbal communication to attract and engage the target audience 4.2 find quick ways to establish customers' needs and wants 4.3 identify up-selling and cross-selling opportunities 4.4 gain commitment for sales or follow-up meetings after the event 4.5 make appointments for follow-up meetings, ensuring that the right people are available for that meeting			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to evaluate own performance at an exhibition	5.1	evaluate the effectiveness of the organisation's, personal and team's sales approach at the event			
		5.2	provide feedback to colleagues to improve the planning for future events and/or to enhance products and/or services			

Learner name: ________________________________ Date: ________________________

Learner signature: ______________________________ Date: ________________________

Assessor signature: _____________________________ Date: ________________________

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

Unit 11: Monitoring Sales Deliveries

Unit reference number: L/502/8595

Level: 2

Credit value: 2

Guided learning hours: 10

Unit summary

This unit aims to provide the knowledge and skills needed when preparing for despatch and delivery of products to customers.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology.

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to deal with sales delivery problems and queries	1.1 explain how to deal with sales delivery problems and queries 1.2 explain when to refer sales delivery problems and queries to someone with more authority 1.3 describe own limits of responsibility and authority when dealing with sales delivery problems and queries			
2 Understand how to maximise sales opportunities when dealing with sales deliveries and handovers	2.1 explain how further sales opportunities can be identified and maximised 2.2 identify the types of sales opportunities that may be identified at the point of handover 2.3 explain how information on further sales opportunities should be used			
3 Be able to progress delivery of the sales order	3.1 ensure the information on the sales order form matches internal documentation 3.2 confirm that products are available for despatch 3.3 confirm that the products are ready for handover to the customer in accordance with the terms and conditions of sale and organisational policy 3.4 make changes to the sales order if required, ensuring customer expectations are met			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		3.5	prepare accurate and complete documentation and records for handover			
		3.6	record information according to organisation's procedures			
4	Be able to complete sales delivery procedures	4.1	confirm that the products are handed over to the customer in accordance with the sales agreement and terms and conditions of sale			
		4.2	confirm that the customer is satisfied with the products			
		4.3	follow up further opportunities for up-selling, cross-selling and selling add-ons			

Learner name: ____ Date: ______________________________

Learner signature: ______________________________________ Date: ______________________________

Assessor signature: _____________________________________ Date: ______________________________

Internal verifier signature: _______________________________ Date: ______________________________

(*if sampled*)

Unit 12: Supporting Customers in Obtaining Finance for Purchases

Unit reference number: Y/502/8597

Level: 2

Credit value: 3

Guided learning hours: 22

Unit summary

The aim of this unit is to develop knowledge, understanding and skills in assisting customers to obtain finance to buy products and/or services.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the conditions for obtaining finance for purchases	1.1 describe the advantages and disadvantages of methods used for raising finance for purchases 1.2 identify the organisation's preferred supplier of financial packages and associated arrangements 1.3 identify additional financial services which are appropriate to sell to customers 1.4 explain the types of terms and conditions that apply to different financial packages 1.5 describe the levels of authority of those involved in assisting customers to obtain finance for purchases			
2 Be able to recommend financial packages to customers for purchases	2.1 calculate the amount needed by the customer in accordance with organisational procedures 2.2 gather sufficient information to enable the application for finance to proceed 2.3 confirm the suitability of the financial package as meeting the customer's needs 2.4 inform the customer of the terms and conditions applicable to the financial package selected 2.5 provide the customer with the opportunity to raise questions or concerns 2.6 provide written proposals for a financial agreement			

Learning outcomes		**Assessment criteria**		**Evidence type**	**Portfolio reference**	**Date**
3	Be able to confirm customers' credit status	3.1	carry out a credit check prior to confirming finance to the customer in accordance with organisational procedures			
		3.2	communicate the outcome of credit searches and financial decisions to customers following organisatonal guidelines			
		3.3	complete financial documentation in compliance with legal and regulatory requirements			

Learner name: ____ Date: _____________________________

Learner signature: ____ Date: _____________________________

Assessor signature: ____ Date: _____________________________

Internal verifier signature: __________________________________ Date: _____________________________

(*if sampled*)

Unit 13: Generating and Qualifying Sales Leads

Unit reference number: H/502/8599

Level: 2

Credit value: 2

Guided learning hours: 15

Unit summary

This unit aims to provide the skills and knowledge needed to generate and qualify sales leads.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads	1.1 describe the organisational practices for acquiring contact lists and databases 1.2 describe the practices relating to the sharing of customer information across the organisation 1.3 identify the legislation and regulation relating to generating and qualifying sales leads 1.4 explain the ethical codes of conduct relating to the generating and qualifying of leads			
2 Understand the process of generating and qualifying sales leads	2.1 explain how customers are segmented 2.2 explain why and when different methods of contacting a prospect should be used 2.3 explain how to identify and access key decision makers 2.4 explain the importance of establishing buying needs and the contact's attitude to buying 2.5 explain how the information provided by customers is assessed for potential up-selling and cross-selling 2.6 explain how to identify customers who have high order value potential or up selling and cross selling opportunities			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to prospect for customers	3.1	identify the target market customers and prospects according to the agreed criteria			
		3.2	source and gather market and prospect information according to the agreed criteria			
		3.3	qualify the sales contact according to the agreed criteria			
		3.4	record details of sales contact in accordance with organisational procedures			

Learner name: ______________________________ Date: ____________________

Learner signature: ___________________________ Date: ____________________

Assessor signature: __________________________ Date: ____________________

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

Unit 14: Meeting Customers’ After-sales Needs

Unit reference number:	R/502/8601
Level:	2
Credit value:	3
Guided learning hours:	14

Unit summary

This unit aims to provide the knowledge of how after-sales service is provided in a way that meets customer’s needs.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to investigate customer after-sales needs	1.1 establish the nature of customers' after-sales needs 1.2 communicate with customers in a way that conforms with quality and customer service standards at all times			
2 Be able to handle customers' after-sales needs	2.1 deal with customers' after sales needs following organisational customer service standards and procedures 2.2 balance customers' needs with those of the organisation 2.3 explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority 2.4 fulfil commitments made to customers in accordance with quality and customer service standards 2.5 record commitments made to customers			
3 Be able to review the after-sales process	3.1 obtain customers' comments on service reliability from customers 3.2 analyse and report the findings to the relevant person in the organisation 3.3 make recommendations for improvements to after-sales service provision in the light of customer feedback			

Learner name: ____ Date: ______________________________

Learner signature: ____ Date: ______________________________

Assessor signature: ____ Date: ______________________________

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

Unit 15: Obtaining and Analysing Sales-related Information

Unit reference number: R/502/8615

Level: 3

Credit value: 4

Guided learning hours: 24

Unit summary

This unit aims to provide the knowledge and skills needed to obtain and analyse information that helps to understand the markets for products and/or services and the volume, mix and value of the products or services sold.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the uses of sales-related information	1.1	explain the importance of up-to-date information for sales planning purposes			
		1.2	explain the benefits and risks of using a range of information sources to support sales activities			
		1.3	explain the limitations of sales-related information			
		1.4	explain the importance of reviewing sales data requirements for current and future use			
2	Understand how to use tools and methods to analyse sales-related information	2.1	explain the advantages and disadvantages of different systems to gather sales-related information			
		2.2	explain how to use different software packages for analysing and presenting sales-related information			
3	Be able to obtain sales-related information about customers, markets and competitors	3.1	specify the information needed to develop an understanding of customers, competitors and markets			
		3.2	identify sources that are capable of providing the required information about the organisation's markets, customers and competitors			
		3.3	collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to use tools and methods to analyse sales-related information	4.1	select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information			
		4.2	define the information needs of the target audience for different types of sales-related information			
		4.3	use the analytical protocols that are appropriate to the selected tools and methods			
		4.4	identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information			
		4.5	validate the reliability and validity of the findings of the analysis			
		4.6	provide sales-related information to the target audience within the agreed timescale and budget			

Learner name: ______________________________ Date: ______________________

Learner signature: ___________________________ Date: ______________________

Assessor signature: __________________________ Date: ______________________

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

Unit 16: Obtaining and Analysing Competitor Information

Unit reference number: H/502/8618

Level: 3

Credit value: 3

Guided learning hours: 18

Unit summary

This unit is all about obtaining and analysing information to understand the impact of competitors on the organisation's sales activities.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to validate information about competitors	1.1	explain how and where to source information about competitors			
		1.2	explain how to validate sourced information about competitors against recognised criteria			
		1.3	describe the advantages and disadvantages of qualitative and quantitative methods for collecting competitor information			
2	Understand the uses of competitor information for sales-related activities	2.1	explain the purpose of obtaining and analysing information about competitors			
		2.2	explain organisational policy on the recording of competitor information			
		2.3	identify criteria that can be used to compare organisations with their competitors			
		2.4	explain how to assess the impact of competitor activity on organisations			
3	Be able to use competitor information for sales-related activities	3.1	obtain and record information about competitors in ways that allow analysis to be undertaken			
		3.2	identify competitors' objectives			
		3.3	identify the nature of potentially threatening competitor activity			
		3.4	estimate the relative importance of competitor activity on profitability and market share growth			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.5 review the impact of competitor activity on sales activities 3.6 propose sales activities in response to competitors' activities			

Learner name: ________________________________ Date: ________________________

Learner signature: ______________________________ Date: ________________________

Assessor signature: _____________________________ Date: ________________________

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

Unit 17: Buyer Behaviour in Sales Situations

Unit reference number: K/502/8622

Level: 3

Credit value: 3

Guided learning hours: 27

Unit summary

This unit aims to provide the knowledge, understanding and skills necessary to enable the sales person to respond to different members of the decision-making unit, whether in consumer markets or organisational markets.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand the impact of different models of buyer behaviour on the sales cycle	1.1	explain the consumer buying decision-making process			
		1.2	explain how the consumer buying decision-making process affects the sales cycle			
		1.3	describe the influences that affect the consumer decision-making process			
		1.4	explain the organisational buying decision-making process			
		1.5	explain how the organisational buying decision-making process affects the sales cycle			
		1.6	describe the influences that affect the organisational buying decision-making process			
		1.7	explain the impact of the different roles within the decision-making unit on the sales cycle			
2	Be able to respond to the buyer at each stage of the decision-making process	2.1	use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process			
		2.2	respond to different decision-makers in a sales situation in a way that is appropriate to their role			
		2.3	use objections as buying opportunities			
		2.4	confirm solution(s) offered meet the needs and wants of decision-makers			

Learner name: ____ Date: ____________________________

Learner signature: ____ Date: ____________________________

Assessor signature: _______________________________________ Date: ____________________________

Internal verifier signature: _________________________________ Date: ____________________________

(*if sampled*)

Unit 18: Communicating using Digital Marketing/Sales Channels

Unit reference number: T/502/8624

Level: 3

Credit value: 4

Guided learning hours: 26

Unit summary

This unit aims to provide the knowledge and skills needed to carry out digital marketing via multiple channels using digital media which are both media and technology independent. These can therefore include, for example, email, SMS (Short Message Service or text messaging), RSS (Rich Text Syndication/Real Simple Syndication), websites, blogs and user-generated content.

Assessment requirements/evidence requirements

This unit must be assessed in accordance with the Council for Administration (CfA) Assessment Strategy. Please see *Annexe C.*

Assessment methodology

This unit is assessed in the workplace or in conditions resembling 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

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Understand how to plan the use of digital media for a specific message, audience and recipients	1.1	explain the selection of the organisation's targeted customers			
		1.2	describe expected target audience responses to different electronic media communication methods			
		1.3	describe the characteristics, advantages and disadvantages of different software packages for presenting marketing information			
		1.4	explain the requirements of using multiple digital marketing technologies			
2	Be able to plan the use of digital media for a specific message, audience and recipients	2.1	confirm the sales and marketing objectives for the digital communication, including response rates and sales generated return on investment			
		2.2	identify the criteria to be used in selecting recipients in target audience			
		2.3	source and acquire targeted lists and databases of recipients in accordance with the plan			
		2.4	confirm the range of electronic media best suited to communicating to the target audience in line with the sales and marketing objectives			
		2.5	agree with relevant people the marketing communications message designed to engage the customer and which is appropriate for the media selected			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to check the digital message can be accessed and/or delivered	3.1	check any links, keywords, and supporting attachments allow access by recipients to further information			
		3.2	identify any risks that the message might be labelled as 'spam' and take action to minimise such risks			
		3.3	enable click-through tracking in digital messages in accordance with the plan			
		3.4	send messages to targeted customers in accordance with the plan			
		3.5	set up reporting system for 'undeliverables' in accordance with organisational procedures			
4	Be able to monitor and evaluate the response to digital activity and take any corrective action	4.1	record undelivered messages in accordance with reporting system			
		4.2	identify repeat communications requirements in line with the sales and marketing objectives			
		4.3	monitor and evaluate the responses to digital marketing against agreed criteria			
		4.4	report the findings of the evaluation in accordance with organisational procedures			

Learner name: ____ Date: ____________________________

Learner signature: ____________________________________ Date: ____________________________

Assessor signature: ___________________________________ Date: ____________________________

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

Unit 19: Manage Personal Development

Unit reference number:	F/600/9469
Level:	2
Credit value:	4
Guided learning hours:	20

Unit summary

This unit will ensure that learners can identify and assess progress against performance requirements in own work role.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to identify and agree performance requirements of own work role	1.1	outline work role performance requirements with those they report to			
2	Be able to measure and progress against objectives	2.1	identify ways that progress will be measured against own work objectives			
3	Be able to identify gaps in skills and knowledge in own performance	3.1	explain knowledge and skills required for own work role			
		3.2	identify opportunities and resources available for personal development			
		3.3	produce a development plan to address own needs and agree with line manager			
4	Be able to carry out and assess activities within own development plan	4.1	plan activities in own development plan that address identified needs			
		4.2	collect feedback from colleagues on the result of development activities on own performance			
		4.3	assess the success of activities carried out as part of own development plan			

Learner name: ______________________________________ Date: ________________________

Learner signature: ___________________________________ Date: ________________________

Assessor signature: __________________________________ Date: ________________________

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

Unit 20: Participate in Meetings

Unit reference number: H/600/9688

Level: 2

Credit value: 2

Guided learning hours: 10

Unit summary

This unit will ensure that learners are able to prepare for, take part in and communicate information arising from meetings.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to prepare for a meeting	1.1	explain meeting objectives prior to the meeting			
		1.2	identify own role and prepare as necessary			
2	Be able to participate in a meeting	2.1	contribute to meeting discussions using evidence to support own opinions			
		2.2	acknowledge other viewpoints presented at a meeting			
		2.3	seek clarification or confirmation of own understanding of outcomes			
3	Be able to communicate information to relevant stakeholders	3.1	communicate information from the meeting to those who have an interest, in line with any organisational protocol			

Learner name: ____ Date: __________________________

Learner signature: _____________________________________ Date: __________________________

Assessor signature: ____________________________________ Date: __________________________

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

Unit 21: Communicate Information and Knowledge

Unit reference number: H/600/9724

Level: 2

Credit value: 3

Guided learning hours: 10

Unit summary

This unit will ensure that learners are able to communicate selected information and knowledge to a target audience using appropriate communication techniques and methods.

Assessment methodology

This unit is assessed using evidence from the workplace, ie observable performance, physical products of work (such as reports, plans, correspondence etc), witness testimony, discussion and questioning etc.

Simulation is not allowed.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
1	Be able to identify the information required, and its reliability for communication	1.1 1.2	explain the information and knowledge that needs communicating identify the target audience requiring the information and knowledge			
2	Be able to understand communication techniques and methods	2.1 2.2	identify what techniques and methods can be used to communicate information and knowledge explain how to select the most appropriate technique and method			
3	Be able to communicate information and knowledge using appropriate techniques and methods	3.1 3.2	communicate to target audience using the appropriate techniques and methods explain how the target audience has received and understood the information communicated			
4	Be able to adapt communication techniques and methods according to target audience response	4.1	explain how to modify communication techniques and methods in response to verbal and non-verbal feedback			

Learner name: ________________________________ Date: ____________________

Learner signature: ______________________________ Date: ____________________

Assessor signature: _____________________________ Date: ____________________

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

Further information and useful publications

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

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

Key publications

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

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

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website on the Delivering BTEC pages. Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website.

How to obtain National Occupational Standards

The Council for Administration
6 Graphite Square
Vauxhall Walk
London SE11 5EE

Telephone:	0207 091 9620
Fax:	0207 091 7340
Email:	info@cfa.uk.com
Website:	www.cfa.uk.com

Professional development and training

Professional development and training

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

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

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

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

Training and support for the lifetime of the qualifications

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

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

To get in touch with our dedicated support teams please visit our website at: qualifications.pearson.com/en/support/contact-us.html

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

Annexe A: Quality assurance

Key principles of quality assurance

- A centre delivering Pearson qualifications must be a Pearson recognised centre and must have approval for qualifications that it is offering.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to the effective delivery and quality assurance of assessment. The centre must abide by these conditions throughout the period of delivery.
- Pearson makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Pearson qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes and dealing with special circumstances, appeals and malpractice.

Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Pearson. Pearson is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. The specific arrangements for working with centres will vary. Pearson seeks to ensure that the quality-assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them in providing robust quality-assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Pearson operates a quality-assurance process, designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres offering this qualification must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Pearson.

The Pearson quality-assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Pearson qualifications
- annual visits to centres by Pearson for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by a Pearson quality development reviewer
- annual visits by occupationally competent and qualified Pearson Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Centres are required to declare their commitment to ensuring quality and appropriate opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Annexe B: Centre certification and registration

Pearson Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Pearson will maintain the integrity of Pearson NVQs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Pearson will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Pearson in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Pearson will aim to secure the appropriate expertise to provide this.

What are the access arrangements and special considerations for the qualification in this specification?

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

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Pearson's policy on access arrangements and special considerations for Pearson qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 2010 Equality Act) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational Qualifications* for further details at qualifications.pearson.com.

Annexe C: Assessment strategy

CfA: Business Skills @ Work
6 Graphite Square
Vauxhall Walk
London SE11 5EE
info@cfa.uk.com
Tel: 020 7091 9620
Fax: 020 7091 7340
www.cfa.uk.com

Assessment strategy

2010 Sales Standards

December 2010

Contents

1 Introduction

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

2 External quality control

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

2.2 Awarding organisations must use independent assessment[1] for NVQs /SVQs and competence-based qualifications.

2.3 Awarding organisations will supply the CfA: Business Skills @ Work (CfA) with reports:

- Quarterly: provide registration and achievement data at unit and qualification levels.

3 Assessing performance

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

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

4 Simulation of NVQ/SVQ units

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

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

[1] Independent assessment is assessment of candidates' work that is carried out by assessors who do not have a vested interest in the outcome.

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

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

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

or

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

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

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

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

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

5.3 **External moderators/verifiers or internal moderators/ verifiers** must be occupationally competent to make Sales moderation and verification judgements about the quality of assessment and the assessment process.

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

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

Annexe D: Additional requirement for qualifications that use the term ‘NVQ’ in a qualification title

Please go to www.ofqual.gov.uk to access the document *‘Operating rules for using the term ‘NVQ’ in a qualification title’*.

April 20117

For information about Edexcel, BTEC or LCCI qualifications visit
qualifications.pearson.com

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