Pearson Edexcel Level 3 NVQ Certificate and Diploma in Sales

Specification

NVQ/Competence-based qualification

For first registration April 2011

Issue 3

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

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This specification is Issue 3. 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

These qualifications were previously known as:

Edexcel Level 3 NVQ Certificate in Sales (QCF)

Edexcel Level 3 NVQ Diploma in Sales (QCF)

The QNs remain the same.

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

ISBN 978 1 446 94008 2

Summary of Pearson Edexcel Level 3 NVQ Certificate and Diploma in Sales specification Issue 3 changes

Summary of changes made between previous issue and this current issue	Page number
All references to QCF have been removed throughout the specification	
Definition of TQT added	3
Definition of sizes of qualifications aligned to TQT	3
Credit value range removed and replaced with lowest credit value for the shortest route through the qualification	5 & 7
TQT value added	5 & 7
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	5 & 7
QCF references removed from unit titles and unit levels in all units	15-127
Guided learning definition updated	12

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

Qualification title covered by this specification

This specification gives you the information you need to offer the Pearson Edexcel Level 3 NVQ Certificate and Diploma in Sales

Qualification title	Qualification Number (QN)	Accreditation start date
Pearson Edexcel Level 3 NVQ Certificate in Sales	600/1235/3	01/04/2011
Pearson Edexcel Level 3 NVQ Diploma in Sales	600/1236/5	01/04/2011

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding. The Qualification Number (QN) should be used by centres when they wish to seek public funding for their learners. Each unit within a qualification will also have a unit reference number.

The qualification title and unit reference numbers will appear on the learner's 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 3 NVQ Certificate and Diploma in Sales

These qualifications:

- are nationally recognised
- are 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 3 NVQ Certificate and Diploma in Sales have been approved as components for the Sales Apprenticeship framework.

What is the purpose of these qualifications?

These qualifications are 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 qualifications cover a range of functions including developing a sales strategy, managing sales territories and teams and face-to-face and telephone selling.

Who are these qualifications for?

These qualifications are for all learners aged 16 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 these qualifications to the learner and employer?

These qualifications allow 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, they contribute to the development of skilled labour in the sector. These qualifications contribute towards the competence element of an apprenticeship.

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).

What are the potential job roles for those working towards these qualifications?

- 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 these qualifications?

On the successful completion of a Pearson Edexcel Level 3 NVQ Certificate and Diploma in Sales learners can progress within employment or to Level 4/5 qualifications such as the:

- Pearson Edexcel Level 4 NVQ Diploma in Customer Service
- Pearson Edexcel Level 4 NVQ Certificate and Diploma in Business and Administration
- Pearson Edexcel Level 5 NVQ Diploma in Management
- Pearson Edexcel BTEC Level 5 HND Diploma in Business

What is the qualification structure for the Pearson Edexcel Level 3 NVQ Certificate in Sales?

Qualification TQT: 250; GLH (guided learning hours): 141.

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

To achieve the Pearson Edexcel Level 3 NVQ Certificate in Sales learners must achieve 25 credits. They must complete the two mandatory units in Group A (six credits) and achieve a further 19 credits from Groups B and C, of which a maximum of nine credits can be completed from Group C.

A minimum of 15 credits must be completed at Level 3.

Group A – mandatory units

Unit reference number	Unit title	Credit	Level
F/502/8612	Negotiating, Handling Objections and Closing Sales	4	3
A/502/8561	Complying with Legal, Regulatory and Ethical Requirements in a Sales or Marketing Role	2	2

Group B – optional units

Unit reference number	Unit title	Credit	Level
J/502/8594	Selling at Exhibitions	5	2
R/502/8601	Meeting Customers' After-sales Needs	3	2
F/502/8559	Time Planning in Sales	2	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
L/502/8628	Pricing for Sales Promotions	5	3
L/502/8631	Preparing and Delivering a Sales Presentation	4	3
D/502/8634	Developing and Implementing Sales Call Plans	3	3
K/502/8636	Assisting Customers in Obtaining Finance for Purchases	2	3
T/502/8638	Assessing Customers' Credit Status	4	3

Unit reference number	Unit title	Credit	Level
T/502/8624	Communicating Using Digital Marketing/Sales Channels	4	3
A/502/8639	Contributing to the Development and Launch of New Products and/or Services	4	3
D/502/8651	Prioritising Information for Sales Planning	3	4
M/502/8654	Monitoring and Managing Sales Team Performance	5	4
A/502/8656	Developing Sales Proposals	5	4
F/502/8657	Building and Retaining Sales Relationships	5	4
L/502/8659	Developing and Implementing Sales Support and Customer Service Programmes	5	4
H/600/9724	Communicate Information and Knowledge	3	2
L/600/9586	Manage Own Professional Development Within an Organisation	4	3

Group C – optional units

Unit reference number	Unit title	Credit	Level
R/600/9587	Develop, Maintain and Review Personal Networks	4	4
M/600/9676	Support Learning and Development within Own Area of Responsibility	5	4
Y/600/9686	Lead and Manage Meetings	4	3
Y/601/1230	Organise the Delivery of Reliable Customer Service	6	3
T/502/8641	Leading a Sales or Marketing Team	4	3
F/502/8643	Managing the Induction and Probation of Sales Staff	3	3
L/502/8662	Recruiting Sales Team Members	4	4

What is the qualification structure for the Pearson Edexcel Level 3 NVQ Diploma in Sales?

Qualification TQT: 370; GLH (guided learning hours): 210.

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

To achieve the Pearson Edexcel Level 3 NVQ Diploma in Sales learners must achieve 37 credits. They must complete the two mandatory units in Group A (six credits) and achieve a further 31 credits from Groups B and C, of which a maximum of 13 credits can be completed from Group C.

A minimum of 22 credits must be completed at Level 3.

Group A – mandatory units

Unit reference number	Unit title	Credit	Level
F/502/8612	Negotiating, Handling Objections and Closing Sales	4	3
A/502/8561	Complying with Legal, Regulatory and Ethical Requirements in a Sales or Marketing Role	2	2

Group B – optional units

Unit reference number	Unit title	Credit	Level
J/502/8594	Selling at Exhibitions	5	2
R/502/8601	Meeting Customers' After-sales Needs	3	2
F/502/8559	Time Planning in Sales	2	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
L/502/8628	Pricing for Sales Promotions	5	3
L/502/8631	Preparing and Delivering a Sales Presentation	4	3
D/502/8634	Developing and Implementing Sales Call Plans	3	3
K/502/8636	Assisting Customers in Obtaining Finance for Purchases	2	3
T/502/8638	Assessing Customers' Credit Status	4	3
Unit	**Unit title**	**Credit**	**Level**

reference number			
T/502/8624	Communicating Using Digital Marketing/Sales Channels	4	3
A/502/8639	Contributing to the Development and Launch of New Products and/or Services	4	3
D/502/8651	Prioritising Information for Sales Planning	3	4
M/502/8654	Monitoring and Managing Sales Team Performance	5	4
A/502/8656	Developing Sales Proposals	5	4
F/502/8657	Building and Retaining Sales Relationships	5	4
L/502/8659	Developing and Implementing Sales Support and Customer Service Programmes	5	4
H/600/9724	Communicate Information and Knowledge	3	2
L/600/9586	Manage own Professional Development Within an Organisation	4	3
H/600/9660	Develop Working Relationships with Colleagues	3	2

Group C – optional units

Unit reference number	Unit title	Credit	Level
R/600/9587	Develop, Maintain and Review Personal Networks	4	4
M/600/9676	Support Learning and Development within own Area of Responsibility	5	4
Y/600/9686	Lead and Manage Meetings	4	3
Y/601/1230	Organise the Delivery of Reliable Customer Service	6	3
T/502/8641	Leading a Sales or Marketing Team	4	3
F/502/8643	Managing the Induction and Probation of Sales Staff	3	3
L/502/8662	Recruiting Sales Team Members	4	4
D/601/1553	Work with Others to Improve Customer Service	8	3

How are the qualifications graded and assessed?

The overall grade for each 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 qualifications are 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 these qualifications 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?

Each qualification is designed to support learners working in the sales sector. Physical resources need to support the delivery of the qualifications 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:

Portfolio reference: The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.

Date: 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: Negotiating, Handling Objections and Closing Sales

Unit reference number: F/502/8612

Level: 3

Credit value: 4

Guided learning hours: 22

Unit summary

This unit aims to provide the skills to handle and overcome sales objections in order to be able to close 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 handle objections and negotiate with the customer	1.1	describe the scope of authority and responsibility when dealing with objections			
		1.2	identify the resources available to counter the sales objections			
		1.3	describe how to plan and prepare for negotiation			
		1.4	describe how to use testimonials to progress a sale			
		1.5	explain the advantages and disadvantages of different methods of closing a sale			
		1.6	explain organisational procedures for documenting the negotiated sale			
2	Be able to prepare for objections and negotiation with the customer	2.1	identify possible sales objections and appropriate responses prior to dealing with the customer			
		2.2	confirm authorisation to negotiate			
		2.3	prepare a negotiation plan that is capable of providing a mutually acceptable outcome			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to handle objections	3.1	identify customer needs and wants in relation to objections by using a variety of questioning techniques			
		3.2	identify and prioritise customers' concerns			
		3.3	provide evidence to the customer of the strengths of the organisation's products or services			
		3.4	confirm with the customer that the objection(s) have been overcome			
		3.5	identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals			
4	Be able to negotiate with the customer	4.1	carry out negotiations according to negotiation plan			
		4.2	promote the benefits of what is being offered to the customer			
		4.3	explain to the customer when and why no further adjustment is possible			
		4.4	obtain support to progress negotiation that is outside own level of authority			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to close the sale following negotiation	5.1 apply a trial close in accordance with the negotiation plan 5.2 respond to any further objections and concerns 5.3 identify and make use of potential add-on, up-selling or cross-selling opportunities 5.4 summarise agreements made in accordance with organisational procedures and close the sale			

Learner name: ________________________ Date: ________________

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 requirements.

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: 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			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
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 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
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 4: 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to review the after sales process	3.1	obtain 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 5: 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 6: 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 learners 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			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	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			
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: ______________________________

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(*if sampled*)

Unit 7: 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			

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

Learner name: ________________________ Date: ____________________

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(*if sampled*)

Unit 8: 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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 to meet the needs and wants of decision-makers			

Learner name: ____ Date: ______________________________

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(*if sampled*)

Unit 9: Pricing for Sales Promotions

Unit reference number: L/502/8628

Level: 3

Credit value: 5

Guided learning hours: 34

Unit summary

This unit aims to provide the knowledge and skills necessary for designing and implementing price promotions, incentives or discounts in line with organisational pricing policies.

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 price-based promotions	1.1	describe the strengths and weaknesses of different types of price-based promotions, including incentives and discounts			
		1.2	describe the different approaches used by competitors to respond to price changes and price-based promotions			
		1.3	explain how to identify and use sales opportunities resulting from a price-based promotion for higher volume and value sales			
		1.4	describe how to assess the organisational costs and benefits of price-based promotions			
		1.5	identify legal and ethical issues relating to price-based promotions			
2	Be able to justify price-based promotions as part of a promotional strategy	2.1	identify situations where a price-based promotion is justified to meet sales targets			
		2.2	calculate the affordability of a proposed price-based promotion and its effects on the achievement of sales volume and profitability targets			
		2.3	identify how to gain internal support or guidance on implementing price-based promotions			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to develop and present proposals for price-based promotions	3.1	identify risks in a price-based promotion			
		3.2	identify contingencies appropriate to the risks identified			
		3.3	prepare proposals to justify price-based promotions in accordance with organisational procedures			
		3.4	present a proposal following organisational procedures			
4	Understand how to evaluate price based promotions	4.1	explain the importance of measuring the impact of price-based promotions on sales activities			
		4.2	explain the importance of evaluating the likely impact of price-based promotions on future sales activities			
		4.3	describe the methods and mechanisms for measuring the success of price-based promotions			
		4.4	describe how monitoring information is used to inform the design of future promotions			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
5	Be able to implement and evaluate price-based promotions	5.1	implement price-based promotions within the scope of own authority			
		5.2	monitor customer and competitor reactions to a price-based promotion against agreed criteria			
		5.3	evaluate the impact of the promotion on market conditions against agreed criteria			
		5.4	identify how the outcomes of price-based promotions will be used to inform future promotions			

Learner name: ____ Date: ______________________________

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(*if sampled*)

Unit 10: Preparing and Delivering a Sales Presentation

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

Unit summary

This unit aims to provide the necessary skills for developing and delivering sales presentations.

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 factors for consideration in the preparation of sales presentations	1.1	explain the importance of presentations to the achievement of sales targets			
		1.2	explain the difference between formal and informal presentations			
		1.3	explain the importance of setting aims and objectives when preparing a presentation			
		1.4	describe how customer characteristics and buying behaviours will influence a presentation			
		1.5	identify who to go to for support relating to the presentation			
		1.6	explain the legal, social and ethical constraints that need to be considered when designing and delivering sales presentations			
2	Be able to prepare a sales presentation	2.1	describe the needs of the customer or audience			
		2.2	set objectives for the sales presentation ensuring they reflect the customers' or audience's needs and interests			
		2.3	assess the suitability of the venue for the presentation, and review issues relating to its size, acoustics and layout			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.4 identify and prepare resources for delivery of the presentation 2.5 obtain promotional material that will enhance the presentation 2.6 include the product/service benefits and/or unique selling propositions in the presentation 2.7 structure the presentation in line with its objectives 2.8 ensure the presentation complements any proposal already supplied to the customer 2.9 ensure the presentation can be delivered within the agreed timescale			
3 Understand how to deliver sales presentations	3.1 describe how to use verbal and non-verbal communications in presentations 3.2 explain the importance of rehearsing a presentation 3.3 describe techniques to capture and retain the audience’s attention 3.4 describe the organisational methods for reporting and recording the outcome of presentations			

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

Learner name: ______________________________ Date: ______________________

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(*if sampled*)

Unit 11: Developing and Implementing Sales Call Plans

Unit reference number: D/502/8634

Level: 3

Credit value: 3

Guided learning hours: 22

Unit summary

This unit aims to provide the knowledge and skills needed to develop and implement a sales call plan.

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 develop a sales call plan	1.1 identify customers and prospects to be contacted that meet the agreed criteria 1.2 determine the time available to deal with prospective and/or existing customers 1.3 prepare and assemble sales materials and sales perspectives that can be used during contact with customers or prospects 1.4 identify sales targets based on access to customers and prospects			
2 Be able to undertake a sales call	2.1 identify the customer's or prospect's current situation, needs and wants in relation to products and/or services 2.2 identify customer needs and wants 2.3 establish the strength of the prospect and their level of interest 2.4 identify competitors with whom the prospect or customer has connections 2.5 promote the organisation's strengths 2.6 use testimonials to highlight benefits and features of products and/or services			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	2.7	explain to the customer how the products and/or services can solve customer problems and add value to the customer experience			
	2.8	identify actions that need to be taken to progress, and close the sale			
	2.9	identify ways of improving sales techniques through a review of the sales call			

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(*if sampled*)

Unit 12: Assisting Customers in Obtaining Finance for Purchases

Unit reference number: K/502/8636

Level: 3

Credit value: 2

Guided learning hours: 11

Unit summary

The aim of this unit is to develop knowledge, understanding and sales 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 identify the advantages and disadvantages of different methods used for raising finance for purchases			
	1.2 identify the organisation’s preferred supplier of financial packages			
	1.3 identify the 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			
	1.6 explain the organisation’s legal procedures for completion of finance documentation			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to propose financial options to customers	2.1	determine the customer's need for finance, the amount of borrowing required and any special requirements or constraints			
		2.2	agree the preferred financial option with the customer			
		2.3	gather sufficient information to enable the application for finance to proceed			
		2.4	resolve shortfalls and inconsistencies in information supplied by the customer			
		2.5	provide the customer with opportunities to ask questions and raise concerns			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to complete finance arrangements for purchases	3.1	inform the customer of the terms and conditions of the financial arrangements			
		3.2	provide written proposals for a finance agreement to the customer			
		3.3	ensure all documentation is completed in compliance with legal and regulatory requirements			

Learner name: ____ Date: ______________________________

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(*if sampled*)

Unit 13: Assessing Customers' Credit Status

Unit reference number: T/502/8638

Level: 3

Credit value: 4

Guided learning hours: 26

Unit summary

This unit aims to provide the knowledge and skills needed to assess a customer's creditworthiness before allowing them to open an account and use credit limits offered by the organisation. Credit status is also assessed when a customer starts dealing in a new or different area of business.

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 customer credit status	1.1 explain the purpose of assessing customers' credit status 1.2 describe a range of internal and external checks that may be used to assess customer credit status 1.3 explain how liquidity ratios are calculated and are used to assess customer credit status 1.4 explain the importance of following organisational procedures when carrying out a credit status assessment			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to assess the credit status of customers	2.1 identify the customers' requirements for sales and credit 2.2 explain to the customer the process the organisation will use for approving credit and setting a credit limit 2.3 gather sufficient financial information from the customer to support credit searches 2.4 ensure the customer is financially secure by analysing their liquidity ratios 2.5 confirm the creditworthiness of customers by conducting checks through banks, credit rating agencies or supplier references and internal colleagues 2.6 complete a formal agreement with the customer in line with the organisational procedures if the credit searches have proved satisfactory 2.7 explain to the customer if the credit searches have proved negative and offer cash trading only			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to monitor the credit status of customers	3.1	monitor the customer’s account regularly following the organisation’s procedures			
		3.2	liaise with the customer regarding any changes in credit limits and the status of their account in accordance with organisational procedures			

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(*if sampled*)

Unit 14: 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			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
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			
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			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	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: ____________________

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(*if sampled*)

Unit 15: Contributing to the Development and Launch of New Products and/or Services

Unit reference number: A/502/8639

Level: 3

Credit value: 4

Guided learning hours: 26

Unit summary

This unit aims to provide the knowledge and skills needed to contribute to the development of new 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 product development process	1.1 describe the sales forecasting technique used by the organisation 1.2 explain the market features and trends relating to products or services in the market 1.3 explain the customer base for the proposed product in terms of their wants and needs			
2 Be able to contribute to the product and/or service development and launch process	2.1 consult with colleagues and selected customers about a new product or service strategy 2.2 generate ideas and/or enhancements to others' ideas for new products or services that meet the development criteria 2.3 screen new ideas in accordance with the organisation's guidelines and marketing objectives 2.4 test the market for the proposed product and/or service in accordance with the development plan 2.5 provide information about existing customers, their needs, wants and behaviours in accordance with the market analysis specification			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.6 support the preparation of a business case for the launch of a new product and/or service in accordance with the development plan 2.7 forecast sales to support business case preparation in accordance with the development plan 2.8 prepare information for customers about the new product and/or service in accordance with the development plan 2.9 use feedback from stakeholders to refine the new product and/or service			

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(*if sampled*)

Unit 16: Prioritising Information for Sales Planning

Unit reference number: D/502/8651

Level: 4

Credit value: 3

Guided learning hours: 20

Unit summary

This unit aims to provide the knowledge, understanding and skills to ensure an organisation has a clear and up-to-date picture of its markets and can use appropriate information to support the development of sales strategies and plans.

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 sources and types of information that support sales	1.1 describe the information about customers' behaviour that is relevant to sales 1.2 explain the nature of competitors' sales activities 1.3 explain the relevance of information from the external business environment to sales 1.4 describe sources of business information relevant to sales			
2 Understand internal information that supports sales	2.1 describe the customer base of the organisation 2.2 explain organisational information storage procedures 2.3 explain organisational procedures for communicating sales-based information to the sales team			
3 Be able to carry out a business audit of the internal and external sales environment	3.1 obtain information about customers and competitors from a variety of sources to enable a business audit to be conducted 3.2 organise sales information to support effective sales planning 3.3 prioritise the internal strengths and weaknesses, and external opportunities and threats the organisation faces in relation to sales objectives			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to use sales information to support the sales planning function	4.1	monitor trends and developments that impact on business and sales activities against agreed criteria			
		4.2	identify market developments and their implications for organisational sales plans			
		4.3	ensure that sales information is communicated to those who need it in accordance with organisational procedures			

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(*if sampled*)

Unit 17: Monitoring and Managing Sales Team Performance

Unit reference number: M/502/8654

Level: 4

Credit value: 5

Guided learning hours: 32

Unit summary

This unit aims to provide knowledge and skills for monitoring and managing the performance of a sales team.

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

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

Learner name: ______________________________ Date: ______________________

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(*if sampled*)

Unit 18: Developing Sales Proposals

Unit reference number: A/502/8656

Level: 4

Credit value: 5

Guided learning hours: 30

Unit summary

This unit aims to provide the knowledge and skills for preparing sales proposals for 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 write sales proposals	1.1 explain how to write a proposal that differentiates the offer from that of a competitor and promotes organisational strengths 1.2 describe how to put together a persuasive argument based on quantitative and qualitative evidence 1.3 explain the importance of addressing the brief in tender documentation 1.4 explain the importance of using the 'house style' in proposals 1.5 explain the legal and ethical issues relating to sales proposals 1.6 explain the client's procedures for submitting sales proposals			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to develop sales proposals	2.1	ensure the prospect's or customer's requirements are addressed in the proposal			
		2.2	ensure that all identified issues requiring clarification are resolved before the proposal is finalised			
		2.3	identify the conditions and constraints which need to be included within the proposal in order to protect the organisation's interests			
		2.4	present the proposal in 'house style'			
		2.5	ensure that the proposal is based on market factors			
		2.6	provide the required level of detail as briefed by the prospect or customer			
		2.7	ensure that the price reflects the value within the proposal			
		2.8	gain internal approval before submission			
		2.9	supply the proposal within the agreed timescale			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to evaluate the proposal	3.1	obtain feedback from colleagues and the customer on the proposal			
		3.2	evaluate the outcome of the proposal and recommend improvements for the future			

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(*if sampled*)

Unit 19: Building and Retaining Sales Relationships

Unit reference number: F/502/8657

Level: 4

Credit value: 5

Guided learning hours: 34

Unit summary

The unit is designed to enable the building of strong relationships with customers and understand customer's needs and expectations more clearly by working in partnership with them.

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 benefits and risks of planning and investing in sales relationships	1.1	explain the criteria by which to evaluate and prioritise customers with whom the organisation should build sales relationships			
		1.2	explain the long-term value that customers can bring to the organisation through developing sales relationships with them			
		1.3	describe how to identify risks involved in relationships with customers			
		1.4	explain how to build trust, commitment and co-operation with customers			
		1.5	explain methods of monitoring and evaluating customer relationships			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to build sales relationships	2.1	prioritise customers with whom to build sales relationships			
		2.2	balance existing and potential customer needs and expectations with those of the organisation's sales strategy			
		2.3	develop a customer relationship plan which takes into account the organisation's resource requirements			
		2.4	offer products and/or services in terms of customer needs and expectations			
		2.5	negotiate sales solution(s) with the customer that are mutually beneficial			
		2.6	identify further opportunities to develop the relationship with the customer			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to retain sales customers	3.1	collate customer feedback about the organisation’s provision of products and/or services in accordance with organisational procedures			
		3.2	ensure that the quality and consistency of products and/or services is being maintained			
		3.3	manage customer complaints or problems and provide sales solutions in accordance with organisational procedures and standards			
		3.4	ensure feedback is given to colleagues on the status of the sales relationship			
		3.5	monitor and evaluate the sales relationship in accordance with organisational procedures			

Learner name: ________________________________ Date: ______________________

Learner signature: ______________________________ Date: ______________________

Assessor signature: _____________________________ Date: ______________________

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

Unit 20: Developing and Implementing Sales Support and Customer Service Programmes

Unit reference number: L/502/8659

Level: 4

Credit value: 5

Guided learning hours: 35

Unit summary

This unit aims to provide the knowledge and skills on how to ensure that high levels of sales and customer service support are delivered.

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 requirement to provide sales support and customer service programmes	1.1 explain the advantages and disadvantages of customer care programmes, customer support and customer service programmes 1.2 explain how customer care programmes, customer support and customer service programmes add value for customers and the organisation 1.3 describe how service standards are developed and used to manage performance in customer service 1.4 explain quality assurance models that help to manage customer service quality 1.5 explain how to ensure that the level of service provided continues to meet customer expectations			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to develop sales support and/or customer service programmes	2.1 plan a sales support and customer service programme in accordance with the sales strategy 2.2 evaluate the effectiveness of existing processes for managing and providing service to customers against agreed criteria 2.3 develop a sales support or customer service programme, or recommend improvements to existing processes that meet the agreed criteria 2.4 establish resource requirements directly related to the sales area to deliver sales support and customer management to the agreed standard			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to implement sales support and customer service programmes	3.1	identify appropriate ICT support for effective communication with customers			
		3.2	adapt to changing circumstances in implementing sales support and customer service programmes in accordance with the plan			
		3.3	record customer management information in accordance with organisational procedures			
		3.4	keep those concerned with sales support and customer service up to date with customer management information			
		3.5	ensure ongoing compliance with quality initiatives, processes and procedures and service level agreements as agreed between the customer and the organisation			
		3.6	take prompt action in the event of shortfalls in service standards in accordance with the sales strategy			

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	explain the information and knowledge that needs communicating			
		1.2	identify the target audience requiring the information and knowledge			
2	Be able to understand communication techniques and methods	2.1	identify what techniques and methods can be used to communicate information and knowledge			
		2.2	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	communicate to target audience using the appropriate techniques and methods			
		3.2	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*)

Unit 22: Manage own Professional Development within an Organisation

Unit reference number: L/600/9586

Level: 3

Credit value: 4

Guided learning hours: 20

Unit summary

This unit helps learners to produce, implement and review a personal professional development plan that supports development.

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 assess own career goals and personal development	1.1	identify own career and personal goals			
		1.2	assess how own career goals affect work role and professional development			
2	Be able to set personal work objectives	2.1	agree SMART (Specific, Measurable, Achievable, Realistic and Time-bound) personal work objectives in line with organisational objectives			
3	Be able to produce a personal development plan	3.1	identify gaps between objectives set and own current knowledge and skills			
		3.2	produce a development plan			
4	Be able to implement and monitor own personal development plan	4.1	plan activities identified in own development plan			
		4.2	explain how to monitor and review own personal development plan			

Learner name: ________________________________ Date: ______________________

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Assessor signature: _____________________________ Date: ______________________

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

Unit 23: Develop Working Relationships with Colleagues

Unit reference number: H/600/9660

Level: 2

Credit value: 3

Guided learning hours: 15

Unit summary

This unit will help learners to establish and develop effective working relationships with colleagues.

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 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. Understand the benefits of working with colleagues	1.1 describe the benefits of productive working relationships			
2. Be able to establish working relationships with colleagues	2.1 identify colleagues within own and other organisations 2.2 agree the roles and responsibilities for colleagues			
3. Be able to act in a professional and respectful manner when working with colleagues	3.1 explain how to display behaviour that shows professionalism			
4. Be able to communicate with colleagues	4.1 identify, information to others clearly and concisely			
5. Be able to identify potential work-related difficulties and explore solutions	5.1 identify potential work-related difficulties and conflicts of interest 5.2 explain how to resolve identified potential difficulties			

Learner name: ____________________ Date: ____________

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Assessor signature: ____________________ Date: ____________

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

Unit 24: Develop, Maintain and Review Personal Networks

Unit reference number: R/600/9587

Level: 4

Credit value: 4

Guided learning hours: 25

Unit summary

This unit helps learners to develop, maintain and review networking relationships based on personal contacts.

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

Learner name: ________________________________ Date: ____________________

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Assessor signature: _____________________________ Date: ____________________

Internal verifier signature: _______________________ Date: ____________________

(*if sampled*)

Unit 25: Support Learning and Development within own Area of Responsibility

Unit reference number: M/600/9676

Level: 4

Credit value: 5

Guided learning hours: 25

Unit summary

This unit helps learners to understand the importance of learning and to develop a learning environment within own area of responsibility.

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 learning needs of colleagues in own area of responsibility	1.1	identify gaps between requirements of colleagues' current or future work roles and their existing knowledge, understanding and skills			
		1.2	prioritise learning needs of colleagues			
		1.3	produce personal development plans for colleagues in own area of responsibility			
2	Understand how to develop a learning environment in own area of responsibility	2.1	explain the benefits of continual learning and development			
		2.2	explain how learning opportunities can be provided for own area of responsibility			
3	Be able to support colleagues in learning and its application	3.1	identify information, advice and guidance to support learning			
		3.2	communicate to colleagues to take responsibility for their own learning			
		3.3	explain to colleagues how to gain access to learning resources			
		3.4	support colleagues to practise and reflect on what they have learned			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
4	Be able to evaluate learning outcomes and future learning and development of colleagues	4.1	examine with each colleague, whether the learning activities undertaken have achieved the desired outcomes			
		4.2	support colleagues when updating their personal development plan			

Learner name: ______________________________ Date: ______________________

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(*if sampled*)

Unit 26: Lead and Manage Meetings

Unit reference number:	Y/600/9686
Level:	3
Credit value:	4
Guided learning hours:	20

Unit summary

This unit will ensure that learners are able to prepare for, lead and follow up issues identified in 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 to lead a meeting	1.1	perform activities needed to be carried out in preparation for leading a meeting			
		1.2	produce documentation in support of activities			
2	Be able to manage meeting procedures	2.1	identify any formal procedures that apply in own organisation			
3	Be able to chair a meeting	3.1	manage the agenda in cooperation with participants to ensure meeting objectives are met			
		3.2	produce minutes of the meeting and allocate action points after discussions			
4	Be able to undertake post-meeting tasks	4.1	explain that the minutes of the meeting provide an accurate record of proceedings			
		4.2	communicate and follow up meeting outcomes to relevant individuals			
		4.3	evaluate whether the meeting's objectives were met and identify potential improvements			

Learner name: ____ Date: ____________________________

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Assessor signature: _______________________________________ Date: ____________________________

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(*if sampled*)

Unit 27: Organise the Delivery of Reliable Customer Service

Unit reference number: Y/601/1230

Level: 3

Credit value: 6

Guided learning hours: 40

Unit summary

This unit is about how the learner delivers and maintains excellent and reliable customer service. The role of the learner may or may not involve supervisory or management responsibilities but they are expected to take some responsibility for the resources and systems they use which support the service that they give. In the learner’s job they must be alert to customer reactions and know how they can be used to improve the service that they give. In addition, customer service information must be recorded to support reliable service.

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	Plan and organise the delivery of reliable customer service	1.1	plan, prepare and organise everything they need to deliver services or products to different types of customers			
		1.2	organise what they do to ensure that they are consistently able to give prompt attention to your customers			
		1.3	reorganise their work to respond to unexpected additional workloads			
2	Review and maintain customer service delivery	2.1	maintain service delivery during very busy periods and unusually quiet periods			
		2.2	maintain service delivery when systems, people or resources have let them down			
		2.3	consistently meet their customers' expectations			
		2.4	balance the time they take with their customers with the demands of other customers seeking their attention			
		2.5	respond appropriately to their customers when customers make comments about the products or services they are offering			
		2.6	alert others to repeated comments made by their customers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
		2.7	take action to improve the reliability of their service based on customer comments			
		2.8	monitor the action they have taken to identify improvements in the service they give to their customers			
3	Use recording systems to maintain reliable customer service	3.1	record and store customer service information accurately following organisational guidelines			
		3.2	select and retrieve customer service information that is relevant, sufficient and in an appropriate format			
		3.3	quickly locate information that will help solve a customer's query			
		3.4	supply accurate customer service information to others using the most appropriate method of communication			
4	Understand how to organise the delivery of reliable customer service	4.1	describe organisational procedures for unexpected situations and their role within them			
		4.2	describe resource implications in times of staff sickness and holiday periods and their responsibility at these times			
		4.3	explain the importance of having reliable and fast information for their customers and their organisation			

Learning outcomes	Assessment criteria		Evidence type	Portfolio reference	Date
	4.4	evaluate the organisational procedures and systems for delivering customer service			
	4.5	identify useful customer feedback and explain how to decide which feedback should be acted on			
	4.6	describe how to communicate feedback from customers to others			
	4.7	evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information			
	4.8	explain the legal and regulatory requirements regarding the storage of data			

Learner name: ____________________ Date: ____________________

Learner signature: ____________________ Date: ____________________

Assessor signature: ____________________ Date: ____________________

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

Unit 28: Leading a Sales or Marketing Team

Unit reference number: T/502/8641

Level: 3

Credit value: 4

Guided learning hours: 25

Unit summary

This unit aims to provide the skills needed to lead a sales or marketing team.

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 set targets for the sales or marketing team	1.1	agree Specific, Measurable, Achievable, Realistic and Time-bound (SMART) targets for individuals and sales or marketing team performance			
		1.2	agree personal objectives for individual members of the sales or marketing team			
2	Be able to support the motivation of the sales or marketing team	2.1	provide support to team members toward achieving targets and objectives			
		2.2	give recognition to individuals' successes			
		2.3	use individual rewards and incentives to maintain morale in a sales or marketing environment			
		2.4	encourage team members to put forward ideas			
		2.5	assist team members to overcome feelings of 'rejection' that are experienced as a result of a lack of success in sales or marketing endeavours			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
3	Be able to monitor and evaluate the progress of the sales or marketing team	3.1	monitor activities and progress across the team in accordance with the sales or marketing plan			
		3.2	monitor the achievements of individual and sales or marketing team targets in accordance with the sales or marketing plan			
		3.3	monitor customer interaction with individual team members in accordance with the sales or marketing plan			
		3.4	evaluate customer interaction with individual team members against agreed criteria			
		3.5	monitor compliance with legal, regulatory and ethical requirements relating to sales or marketing team activities			
		3.6	appraise the success of sales or marketing activities against agreed objectives and targets			
		3.7	identify areas for improvement in sales or marketing activities			

Learner name: ____ Date: ____________________________

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Assessor signature: ___________________________________ Date: ____________________________

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

Unit 29: Managing the Induction and Probation of Sales Staff

Unit reference number: F/502/8643

Level: 3

Credit value: 3

Guided learning hours: 15

Unit summary

This unit aims to provide the knowledge and skills involved in providing a satisfactory induction and probation for members of the sales team.

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 induction and probation processes for sales staff	1.1 explain the purpose of induction and probation periods for sales staff 1.2 describe organisational procedures for induction and probation for sales staff 1.3 explain organisational employment policies and procedures including: – induction and probation – employment rights and responsibilities – timekeeping and absence – health and safety 1.4 explain the basis of the induction programme and its contribution to efficient sales performance 1.5 describe how mentoring, coaching and buddying might be used to induct new sales staff 1.6 describe the actions to be taken in the event of unsatisfactory performance by sales probationers			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to manage the induction and probation of new sales staff	2.1	manage the induction and probation of new sales staff and their expectations in accordance with organisational procedures			
		2.2	agree targets with new sales staff for probationary period			
		2.3	use mentoring, coaching, or buddying systems in accordance with the induction programme			
		2.4	review the progress of new sales staff at agreed intervals and identify areas for development			
		2.5	provide feedback and support to new sales staff in accordance with identified developmental needs			

Learner name: ______________________________ Date: ____________________

Learner signature: ___________________________ Date: ____________________

Assessor signature: __________________________ Date: ____________________

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

Unit 30: Recruiting Sales Team Members

Unit reference number: L/502/8662

Level: 4

Credit value: 4

Guided learning hours: 23

Unit summary

This unit aims to provide the skills involved in recruiting and selecting members of the sales team.

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 recruitment and selection process relating to sales	1.1 explain the advantages and disadvantages of different methods of recruitment and selection of sales staff 1.2 describe the information that should be included in a job advertisement 1.3 identify the legislation that relates to recruitment and selection 1.4 explain the advantages and disadvantages of different types of specialist expertise available to select sales staff 1.5 describe the criteria by which sales applications are sifted 1.6 explain what, how, and why feedback should be made available to all candidates			

Learning outcomes		Assessment criteria		Evidence type	Portfolio reference	Date
2	Be able to prepare to recruit and select sales team members	2.1	agree the recruitment and selection methods with sales and human resources colleagues			
		2.2	develop the technical sales component of job profiles			
		2.3	develop the technical sales component of person specifications			
		2.4	keep within the agreed budget in the recruitment and selection process			
		2.5	record the reasons for pre-interview selection decisions in accordance with organisational procedures			
		2.6	devise a list of interview questions that address the key competences for a sales team member as defined in the person specification			

Learning outcomes		**Assessment criteria**		**Evidence type**	**Portfolio reference**	**Date**
3	Be able to make selection decisions for sales team members	3.1	contribute to interviews in accordance with agreed role			
		3.2	use the agreed rating criteria to select staff			
		3.3	record the reasons for selection decisions in accordance with organisational procedures			
		3.4	complete post-interview formalities in accordance with organisational procedures			

Learner name: ____ Date: ______________________________

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Assessor signature: ___________________________________ Date: ______________________________

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(*if sampled*)

Unit 31: Work with Others to Improve Customer Service

Unit reference number: D/601/1553

Level: 3

Credit value: 8

Guided learning hours: 53

Unit summary

Teamwork is a key component of delivering and improving excellent customer service. The people the learner works with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders. The delivery of excellent customer service depends on their skills and those of others. It involves communicating with each other and agreeing how they can work together to give a more effective service. They all need to work together positively. The learner must also monitor their own and the team's performance and change the way they do things if that improves customer service. This unit is about how the learner develops a relationship with others to improve their customer service performance.

Assessment requirements/evidence requirements

The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this unit. Simulation is not allowed for any performance evidence within this unit. The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation. The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent. The learner's evidence must include examples of agreeing customer service roles and responsibilities which are:

1 part of their own role

2 part of other people's roles.

The learner must provide evidence that they have worked with two of these groups of people:

1 team members or colleagues

2 suppliers or service partners

3 supervisors, team leaders or managers.

The learner's evidence must show that their work with others involves communication by two of these methods as expected within their job role:

1 face to face

2 in writing

3 by telephone

4 using text messages

5 by email

6 using the internet (including social networking)

7 using an intranet.

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. Improve customer service by working with others	1.1 contribute constructive ideas for improving customer service 1.2 identify what they have to do to improve customer service and confirm this with others 1.3 agree with others what they have to do to improve customer service 1.4 co-operate with others to improve customer service 1.5 keep their commitments made to others 1.6 make others aware of anything that may affect plans to improve customer service			
2. Monitor their own performance when improving customer service	2.1 discuss with others how what they do affects customer service performance 2.2 identify how the way they work with others contributes towards improving customer service			
3. Monitor team performance when improving customer service	3.1 discuss with others how teamwork affects customer service performance 3.2 work with others to collect information on team customer service performance 3.3 identify with others how customer service teamwork could be improved 3.4 take action with others to improve customer service performance			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4. Understand how to work with others to improve customer service	4.1 describe who else is involved either directly or indirectly in the delivery of customer service 4.2 describe the roles and responsibilities of others in their organisation 4.3 describe the roles of others outside their organisation who have an impact on their services or products 4.4 evaluate what the goals or targets of their organisation are in relation to customer service and how these are set 4.5 evaluate how their organisation identifies improvements in customer service			

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

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- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building Functional Skills into your programme
- building effective and efficient quality assurance systems.

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

Contact us

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

To contact your Account Specialist:

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

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

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

Annexe A: 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 these qualifications 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 Edexcel 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 qualifications 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 1995 Disability Discrimination Act and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications* for further details. qualifications.pearson.com

Annexe C: Assessment strategy

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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'*.

March 2017

For more information on Edexcel and BTEC qualifications please visit our website: qualifications.pearson.com

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