

Level 3 NVQ Certificate/ Diploma in Sales (6801-03/04)

February 2011 Version 1.0



Qualification at a glance

Subject area	Sales
City & Guilds number	6801
Age group approved	16+
Entry requirements	No specific entry requirements
Assessment and grading	Portfolio of evidence
Automatic approval	Available
Support materials	Qualification handbook
Registration and certification	See Walled Garden/Online Catalogue for last dates

Title and level	City & Guilds number	Accreditation number
Level 3 NVQ Certificate in Sales	6801-03	600/0934/2
Level 3 NVQ Diploma in Sales	6801-04	600/0927/5



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1 Introduction

This document tells you what you need to do to deliver the qualifications:

Area	Description
Who are the qualifications for?	<p>For learners who work or want to work in the sales sector. These qualifications are for those working in any of the following roles or roles similar to these:</p> <ul style="list-style-type: none">• Building Society Manager• Contact Centre Operator• Credit Manager• Customer Service Assistant/Manager• Estate Agent• Insurance Broker• Insurance Business Development Manager• IT Technical Sales Specialist• Retail Assistant• Retail Manager• Sales Manager• Sales Representative• Store Owner/Manager• Travel Agent• Vehicle Sales Executive
What do the qualifications cover?	<p>They allow learners to learn, develop and practise the skills required for employment and/or career progression in the sales sector.</p>
Are the qualifications part of a framework or initiative?	<p>The Level 3 NVQ Diploma in Sales (6801-04) serves as the competence qualification in the Sales Advanced Apprenticeship framework.</p>
Who did we develop the qualifications with?	<p>They were developed in association with the Council for Administration.</p>
What opportunities for progression are there?	<p>They allow candidates to progress into employment or to the following City & Guilds qualifications:</p> <ul style="list-style-type: none">• Level 3 Certificate in Principles of Sales (7711-03)• Level 2/3 NVQ Certificate/Diploma in Marketing (7712-02/03/04)• Level 2/3 Certificate in Principles of Marketing (7734-02/03)• Level 2/3 NVQ Certificate/Diploma in Business and Administration (4428-02/03)• Level 2/3 Certificate in Principles of Business and Administration (4475-02/03)

Structure

Qualification	Min. no of credits overall	Group A Mandatory (credits)	Group B Optional (credits)	Group C Optional (credits)
Level 3 NVQ Certificate in Sales	25	6	10 (min)	9 (max)
min of 15 credits must be at level 3				
Level 3 NVQ Diploma in Sales	37	6	22 (min)	9 (max)
min of 22 credits must be at level 3				

NB: Candidates do **not** have to take units from optional Group C.

Unit Group Key:

A – Mandatory

B – Optional Group B

C – Optional Group C

City & Guilds unit number	Ofqual unit accreditation number	Unit title	Level	Credit	GLH	Group	Unit selected?
202	A/502/8561	Complying with legal, regulatory and ethical requirements in a sales or marketing role	2	2	13	A	
301	F/502/8612	Negotiating, handling objections and closing sales	3	4	22	A	
201	F/502/8559	Time planning in sales	2	2	13	B	
209	J/502/8594	Selling at exhibitions	2	5	28	B	
213	R/502/8601	Meeting customers' after sales needs	2	3	14	B	
217	H/600/9724	Communicate information and knowledge	2	3	10	B	
302	R/502/8615	Obtaining and analysing sales-related information	3	4	24	B	
303	H/502/8618	Obtaining and analysing competitor information	3	3	18	B	
304	K/502/8622	Buyer behaviour in sales situations	3	3	27	B	
305	T/502/8624	Communicating using digital marketing/sales channels	3	4	26	B	
306	L/502/8628	Pricing for sales promotions	3	5	34	B	
307	L/502/8631	Preparing and delivering a sales presentation	3	4	28	B	
308	D/502/8634	Developing and implementing sales call plans	3	3	22	B	
309	K/502/8636	Assisting customers in obtaining finance for purchases	3	2	11	B	
310	T/502/8638	Assessing customers' credit status	3	4	26	B	

City & Guilds unit number	Ofqual unit accreditation number	Unit title	Level	Credit	GLH	Group	Unit selected?
311	A/502/8639	Contributing to the development and launch of new products and/or services	3	4	26	B	
314	L/600/9586	Manage own professional development within an organisation	3	4	20	B	
401	D/502/8651	Prioritising information for sales planning	4	3	20	B	
402	M/502/8654	Monitoring and managing sales team performance	4	5	32	B	
403	A/502/8656	Developing sales proposals	4	5	30	B	
404	F/502/8657	Building and retaining sales relationships	4	5	34	B	
405	L/502/8659	Developing and implementing sales support and customer service programmes	4	5	35	B	
312	T/502/8641	Leading a sales or marketing team	3	4	25	C	
313	F/502/8643	Managing the induction and probation of sales staff	3	3	15	C	
315	Y/600/9686	Lead and manage meetings	3	4	20	C	
316	Y/601/1230	Organise the delivery of reliable customer service	3	6	40	C	
406	L/502/8662	Recruiting sales team members	4	4	23	C	
407	R/600/9587	Develop, maintain and review personal networks	4	4	25	C	
408	M/600/9676	Support learning and development within own area of responsibility	4	5	25	C	



2 Centre requirements

Approval

If your Centre is approved to offer the qualification Level 3 NVQ in Sales (6770-02) you will have automatic approval for the new Level 3 NVQ Certificate/Diploma in Sales (QCF) (6801-03/04).

To offer these qualifications, new centres will need to gain both centre and qualification approval. Please refer to the *Centre guide* and *Providing City & Guilds Qualifications* for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Resource requirements

Centre staffing

Staff delivering Sales units within these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- 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
- be occupationally knowledgeable in the area(s) for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- have credible experience of providing training.

For imported units please refer to the relevant Assessment Strategy from the standard setting body/sector skills council.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors and internal verifiers

- Centre staff should hold, or be working towards, the relevant D/A/V/T or equivalent in Scotland for their role in delivering, assessing and verifying these qualifications
- or
- A trainer, supervisor or manager, employed by an organisation must either:

1. hold or be working towards, the relevant D/A/V/T or equivalent in Scotland for their role in delivering, assessing and verifying these qualifications
- or
2. seek guidance and approval from City & Guilds to demonstrate that
 - the organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
 - the trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100 per cent to the NOS upon which the qualifications above are based.

For imported units please refer to the Assessment strategy from the relevant sector skills council/standards setting body.

Continuing professional development (CPD)

Centres must support their staff to ensure that they have current knowledge of the occupational area, that delivery, mentoring, training, assessment and verification is in line with best practice, and that it takes account of any national or legislative developments.

Candidate entry requirements

There are no formal entry requirements for learners undertaking these qualifications. However, centres must ensure that learners have the potential and opportunity to gain the qualification(s) successfully.

Any units which have been taken in the Level 2 NVQ Certificate/Diploma in Sales (6801-01/02) can be crossed over to the Level 3 qualification and will not have to be taken again.

To be awarded a QCF NVQ in Sales, learners must demonstrate that they are able to perform the job or an appropriate task competently. Competence may be demonstrated in the private sector, not-for-profit sector or public sector. Learners may be employed as full-time, part-time, paid or voluntary members of staff.

The assessment of all units at any level of a Sales QCF NVQ or competence-based qualification, '... may be based on either candidate performance at work or through RWE, as necessary'.¹

As part of the assessment for this qualification, learners must have access to a work or realistic work environment (RWE).

Realistic work environments

Where the learner is subjected to a work environment and is producing performance evidence subject to all of the following conditions:

- time pressures
 - work problems
 - interruptions
-

¹ See, CfA Assessment Strategy 2010, Sales NOS, December 2010.

- accountabilities
 - office environment
 - tools to do the job.
- eg a candidate in a model or virtual office.

External verifiers will need to approve RWEs on an individual basis before any assessment can begin. Authenticity is essential and approval needs to be endorsed on an annual basis by the external verifier.

Simulation

If a unit or part of a unit at any level is simulated, it must be undertaken in a RWE.

The overarching principle to be applied to units identified as suitable for simulation is that it should only be undertaken in a minority of cases where

- there is a high risk to the security or safety of the learner, individuals, key people in their lives and others
- the opportunity to present evidence from work-based practice happens infrequently and therefore insisting that learners wait for such an occurrence would be unreasonable or create blockages in the assessment system and might carry the risk of de-motivating candidates
- there would otherwise be a breach of confidentiality or privacy.

An example of a simulated task is one that is not going to be used by a third party but meets all the rigour of an RWE ie where the learner is subjected to work timelines, prioritising, interruptions of a working environment etc.

For imported units please refer to the Assessment strategy from the relevant sector skills council/standards setting body.

Age restrictions

These qualifications are approved for learners aged 16 years or over.



3 Delivering the qualification

Initial assessment and induction

An initial assessment of each learner should be made before the start of their programme to identify:

- if the learner has any specific training needs,
- support and guidance they may need when working towards their qualification(s).
- any units they have already completed, or credit they have accumulated which is relevant to the qualification(s).
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the learner fully understands the requirements of the qualification(s), their responsibilities as a learner, and the responsibilities of the centre. This information can be recorded on a learning contract.

Recording documents

Learners and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at: **www.cityandguilds.com/eportfolios**.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate.

Recording forms are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by learners and assessors at the centre. Amendable (MS Word) versions of the forms are available on the City & Guilds website.



4 Assessment

Assessment of the qualification

Candidates must:

- have a completed portfolio of evidence across all the units. This can be via a number of formats e.g. e-portfolio, recording forms etc.

Time constraints

The following must be applied to the assessment of this qualification:

- Candidates must finish their qualification within the candidate's period of registration.

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification.

RPL for Sales units may be evidenced from a range of activities, using valid assessment methods that meet the requirements of the assessment criteria of a unit. Evidence in support of RPL must be authentic, current, valid, relevant and sufficient.

Please refer to the relevant Assessment Strategy for guidance on RPL for imported units.



5 Units

Availability of units

The following units can also be obtained from the Register:
<http://register.ofqual.gov.uk/>

Structure of units

These units each have the following:

- City & Guilds reference number
- unit accreditation number
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- learning outcomes which are comprised of a number of assessment criteria.

Summary of units

Unit number	Unit title	Credits	QCF unit number (UAN)
201	Time planning in sales	2	F/502/8559
202	Complying with legal, regulatory and ethical requirements in a sales or marketing role	2	A/502/8561
209	Selling at exhibitions	5	J/502/8594
213	Meeting customers' after sales needs	3	R/502/8601
217	Communicate information and knowledge	3	H/600/9724
301	Negotiating, handling objections and closing sales	4	F/502/8612
302	Obtaining and analysing sales-related information	4	R/502/8615
303	Obtaining and analysing competitor information	3	H/502/8618
304	Buyer behaviour in sales situations	3	K/502/8622
305	Communicating using digital marketing/sales channels	4	T/502/8624

Unit number	Unit title	Credits	QCF unit number (UAN)
306	Pricing for sales promotions	5	L/502/8628
307	Preparing and delivering a sales presentation	4	L/502/8631
308	Developing and implementing sales call plans	3	D/502/8634
309	Assisting customers in obtaining finance for purchases	2	K/502/8636
310	Assessing customers' credit status	4	T/502/8638
311	Contributing to the development and launch of new products and/or services	4	A/502/8639
312	Leading a sales or marketing team	4	T/502/8641
313	Managing the induction and probation of sales staff	3	F/502/8643
314	Manage own professional development within an organisation	4	L/600/9586
315	Lead and manage meetings	4	Y/600/9686
316	Organise the delivery of reliable customer service	6	Y/601/1230
401	Prioritising information for sales planning	3	D/502/8651
402	Monitoring and managing sales team performance	5	M/502/8654
403	Developing sales proposals	5	A/502/8656
404	Building and retaining sales relationships	5	F/502/8657
405	Developing and implementing sales support and customer service programmes	5	L/502/8659
406	Recruiting sales team members	4	L/502/8662
407	Develop, maintain and review personal networks	4	R/600/9587
408	Support learning and development within own area of responsibility	5	M/600/9676

Unit 201

Time planning in sales

UAN:	F/502/8559
Level:	Level 2
Credit value:	2
GLH:	13
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS54 Manage and prioritise time for sales activities.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to develop knowledge, understanding and skills in planning and evaluating time management in a sales role.

Learning outcome	The learner will:
1. Understand how to manage and prioritise time in a sales role	
Assessment criteria	
The learner can:	
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	

Learning outcome	The learner will:
2. Be able to plan own time in a sales role	
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3. Be able to evaluate time planning in a sales role	
Assessment criteria	
The learner can:	
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	

Unit 202

Complying with legal, regulatory and ethical requirements in a sales or marketing role

UAN:	A/502/8561
Level:	Level 2
Credit value:	2
GLH:	13
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS77 Ensure compliance with legal, regulatory, ethical and social requirements.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to support learners in understanding and adhering to organisational legal, regulatory and ethical requirements.

Learning outcome	The learner will:
1.	Understand the legal, regulatory and ethical requirements in a sales or marketing role
Assessment criteria	
The learner can:	
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 outcome	The learner will:
2.	Be able to comply with organisational policies and procedures for legal, regulatory and ethical requirements in a sales or marketing role

Assessment criteria
<p>The learner can:</p> <ul style="list-style-type: none">2.1 Behave in a way that meets organisational ethical procedures, policies and standards2.2 Identify areas where legal, regulatory or ethical issues may arise2.3 Obtain advice on matters where legal, regulatory or ethical issues might exist2.4 Work within the limits of responsibility and authority in a sales or marketing role2.5 Report issues, problems and actions relating to legal, regulatory or ethical matters in the agreed format

Unit 209

Selling at exhibitions

UAN:	J/502/8594
Level:	Level 2
Credit value:	5
GLH:	28
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS63 Sell products and services at trade fairs, exhibitions or conferences.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	The aim of this unit is to develop knowledge, understanding and sales skills in selling at trade fairs and exhibitions.

Learning outcome	The learner will:
1.	Understand how to assess the relevance of exhibitions for the organisation
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Understand how to prepare for and sell at exhibitions
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3. Be able to prepare for an exhibition	
Assessment criteria	
The learner can:	
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 prices 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 outcome	The learner will:
4. Be able to sell at an exhibition	
Assessment criteria	
The learner can:	
4.1 Use verbal and non-verbal communication to attract and engage the target audience	
4.2 Find quick ways to establish customers' needs and wants	
4.3 Identify up-selling and cross-selling opportunities	
4.4 Gain commitment for sales or follow-up meetings after the event	
4.5 Make appointments for follow-up meetings, ensuring that the right people are available for that meeting	

Learning outcome	The learner will:
5. Be able to evaluate own performance at an exhibition	
Assessment criteria	
The learner can:	
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	

Unit 213

Meeting customers' after sales needs

UAN:	R/502/8601
Level:	Level 2
Credit value:	3
GLH:	14
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS85 Meet your customer's after sales service needs.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge of how after-sales service is provided in a way that meets your customer's needs.

Learning outcome	The learner will:
1.	Be able to investigate customer after sales needs
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Be able to handle customers' after sales needs
Assessment criteria	
The learner can:	
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	Fulfill commitments made to customers in accordance with quality and customer service standards
2.5	Record commitments made to customers

Learning outcome	The learner will:
3.	Be able to review the after sales process
Assessment criteria	
The learner can:	
3.1	Obtain customers' comments on service reliability from customers
3.2	Analyse and report the findings to the relevant person in the organisation
3.3	Make recommendations for improvements to after sales service provision in the light of customer feedback

Unit 217

Communicate information and knowledge

UAN:	H/600/9724
Level:	Level 2
Credit value:	3
GLH:	10
Relationship to NOS:	This unit is linked to Council for Administration Management NOS: M&LE11 Communicate information and knowledge.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about communicating information and knowledge to a wide range of people.

Learning outcome	The learner will:
1.	Be able to identify the information required, and its reliability, for communication
Assessment criteria	
The learner can:	
1.1	Explain the information and knowledge that needs communicating
1.2	Identify the target audience requiring the information and knowledge

Learning outcome	The learner will:
2.	Be able to understand communication techniques and methods
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
3.	Be able to communicate information and knowledge using appropriate techniques and methods
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
4. Be able to adapt communication techniques and methods according to target audience response	
Assessment criteria	
The learner can:	
4.1 Explain how to modify communication techniques and methods in response to verbal and non-verbal feedback	

Unit 301

Negotiating, handling objections and closing sales

UAN:	F/502/8612
Level:	Level 3
Credit value:	4
GLH:	22
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS76 Handle objections and close sales.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the skills to handle and overcome sales objections in order to be able to close the sale.

Learning outcome	The learner will:
1.	Understand how to handle objections and negotiate with the customer
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Be able to prepare for objections and negotiation with the customer
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3. Be able to handle objections	
Assessment criteria	
The learner can:	
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	

Learning outcome	The learner will:
4. Be able to negotiate with the customer	
Assessment criteria	
The learner can:	
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 outcome	The learner will:
5. Be able to close the sale following negotiation	
Assessment criteria	
The learner can:	
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	

Unit 302

Obtaining and analysing sales-related information

UAN:	R/502/8615
Level:	Level 3
Credit value:	4
GLH:	24
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS11 Obtain and analyse sales-related information.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge and skills needed to obtain and analyse information that helps to understand the markets for products and/or services and the volume, mix and value of the products or services sold.

Learning outcome	The learner will:
1.	Understand the uses of sales-related information
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Understand how to use tools and methods to analyse sales-related information
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
3.	Be able to obtain sales-related information about customers, markets and competitors
Assessment criteria	
The learner can:	
3.1	Specify the information needed to develop an understanding of customers, competitors and markets
3.2	Identify sources that are capable of providing the required information about the organisation's markets, customers and competitors
3.3	Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation

Learning outcome	The learner will:
4.	Be able to use tools and methods to analyse sales-related information
Assessment criteria	
The learner can:	
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

Unit 303

Obtaining and analysing competitor information

UAN:	H/502/8618
Level:	Level 3
Credit value:	3
GLH:	18
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS12 Analyse competitor information.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is all about obtaining and analysing information to understand the impact of competitors on the organisation's sales activities.

Learning outcome	The learner will:
1.	Understand how to validate information about competitors
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Understand the uses of competitor information for sales-related activities
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3. Be able to use competitor information for sales-related activities	
Assessment criteria	
The learner can:	
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	

Unit 304

Buyer behaviour in sales situations

UAN:	K/502/8622
Level:	Level 3
Credit value:	3
GLH:	27
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge, understanding and skill necessary to enable the sales person to respond to different members of the decision-making unit, whether in consumer markets or organisational markets.

Learning outcome	The learner will:
1.	Understand the impact of different models of buyer behaviour on the sales cycle
Assessment criteria	
The learner can:	
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 outcome	The learner will:
2.	Be able to respond to the buyer at each stage of the decision making process
Assessment criteria	

The learner can:

- 2.1 Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process
- 2.2 Respond to different decision-makers in a sales situation in a way that is appropriate to their role
- 2.3 Use objections as buying opportunities
- 2.4 Confirm solution(s) offered meet the needs and wants of decision-makers

Unit 305

Communicating using digital marketing/sales channels

UAN:	T/502/8624
Level:	Level 3
Credit value:	4
GLH:	26
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS57 Communicate using multiple digital marketing and sales channels.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	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.

Learning outcome	The learner will:
1.	Understand how to plan the use of digital media for a specific message, audience and recipients
Assessment criteria	
The learner can:	
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 outcome	The learner will:
2.	Be able to plan the use of digital media for a specific message, audience and recipients
Assessment criteria	

The learner can:

- 2.1 Confirm the sales and marketing objectives for the digital communication, including response rates and sales generated return on investment
- 2.2 Identify the criteria to be used in selecting recipients in target audience
- 2.3 Source and acquire targeted lists and databases of recipients in accordance with the plan
- 2.4 Confirm the range of electronic media best suited to communicating to the target audience in line with the sales and marketing objectives
- 2.5 Agree with relevant people the marketing communications message designed to engage the customer and which is appropriate for the media selected

Learning outcome	The learner will:
3. Be able to check the digital message can be accessed and/or delivered	
Assessment criteria	
The learner can:	
3.1 Check any links, keywords, and supporting attachments allow access by recipients to further information	
3.2 Identify any risks that the message might be labelled as 'spam' and take action to minimise such risks	
3.3 Enable click-through tracking in digital messages in accordance with the plan	
3.4 Send messages to targeted customers in accordance with the plan	
3.5 Set up reporting system for 'undeliverables' in accordance with organisational procedures	

- 3.1 Check any links, keywords, and supporting attachments allow access by recipients to further information
- 3.2 Identify any risks that the message might be labelled as 'spam' and take action to minimise such risks
- 3.3 Enable click-through tracking in digital messages in accordance with the plan
- 3.4 Send messages to targeted customers in accordance with the plan
- 3.5 Set up reporting system for 'undeliverables' in accordance with organisational procedures

Learning outcome	The learner will:
4. Be able to monitor and evaluate the response to digital activity and take any corrective action	
Assessment criteria	
The learner can:	
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	

- 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

Unit 306

Pricing for sales promotions

UAN:	L/502/8628
Level:	Level 3
Credit value:	5
GLH:	34
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS34 Pricing to promote products and services.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	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.

Learning outcome	The learner will:
1.	Understand price-based promotions
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Be able to justify price-based promotions as part of a promotional strategy
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3.	Be able to develop and present proposals for price-based promotions
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
4.	Understand how to evaluate price based promotions
Assessment criteria	
The learner can:	
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 outcome	The learner will:
5.	Be able to implement and evaluate price-based promotions
Assessment criteria	
The learner can:	
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

Unit 307

Preparing and delivering a sales presentation

UAN:	L/502/8631
Level:	Level 3
Credit value:	4
GLH:	28
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS53 Develop and deliver a professional sales presentation.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the necessary skills for developing and delivering sales presentations.

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

Learning outcome	The learner will:
2.	Be able to prepare a sales presentation
Assessment criteria	
The learner can:	
2.1	Describe the needs of the customer or audience
2.2	Set objectives for the sales presentation ensuring they reflect the

	customers' or audience's needs and interests
2.3	Assess the suitability of the venue for the presentation, and review issues relating to its size, acoustics and layout
2.4	Identify and prepare resources for delivery of the presentation
2.5	Obtain promotional material that will enhance the presentation
2.6	Include the product/service benefits and/or unique selling propositions in the presentation
2.7	Structure the presentation in line with its objectives
2.8	Ensure the presentation complements any proposal already supplied to the customer
2.9	Ensure the presentation can be delivered within the agreed timescale

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

Unit 308

Developing and implementing sales call plans

UAN:	D/502/8634
Level:	Level 3
Credit value:	3
GLH:	22
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS28 Develop, implement and monitor sales call plans.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge and skills needed to develop and implement a sales call plan.

Learning outcome	The learner will:
1.	Be able to develop a sales call plan
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Be able to undertake a sales call
Assessment criteria	
The learner can:	
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 |
| 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 |

Unit 309

Assisting customers in obtaining finance for purchases

UAN:	K/502/8636
Level:	Level 3
Credit value:	2
GLH:	11
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS82 Assist customers to obtain finance for purchases.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	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.

Learning outcome	The learner will:
1. Understand the conditions for obtaining finance for purchases	
Assessment criteria	
The learner can:	
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 outcome	The learner will:
2. Be able to propose financial options to customers	
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3.	Be able to complete finance arrangements for purchases
Assessment criteria	
The learner can:	
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

Unit 310

Assessing customers' credit status

UAN:	T/502/8638
Level:	Level 3
Credit value:	4
GLH:	26
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS33 Assess customer creditworthiness.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	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.

Learning outcome	The learner will:
1.	Understand how to assess customer credit status
Assessment criteria	
The learner can:	
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 outcome	The learner will:
2.	Be able to assess the credit status of customers
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3.	Be able to monitor the credit status of customers
Assessment criteria	
The learner can:	
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

Unit 311

Contributing to the development and launch of new products and/or services

UAN:	A/502/8639
Level:	Level 3
Credit value:	4
GLH:	26
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 29 Contribute to the development of new products and services.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge and skills needed to contribute to the development of new products and/or services.

Learning outcome	The learner will:
1. Understand the product development process	
Assessment criteria	
The learner can:	
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	

Learning outcome	The learner will:
2. Be able to contribute to the product and/or service development and launch process	
Assessment criteria	
The learner can:	
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,	

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
- 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

Unit 312

Leading a sales or marketing team

UAN:	T/502/8641
Level:	Level 3
Credit value:	4
GLH:	25
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS41 Lead a sales team.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the skills needed to lead a sales or marketing team.

Learning outcome	The learner will:
1.	Be able to set targets for the sales or marketing team
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Be able to support the motivation of the sales or marketing team
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3.	Be able to monitor and evaluate the progress of the sales or marketing team
Assessment criteria	
The learner can:	
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

Unit 313

Managing the induction and probation of sales staff

UAN:	F/502/8643
Level:	Level 3
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge and skills involved in providing a satisfactory induction and probation for members of the sales team.

Learning outcome	The learner will:
1.	Understand the induction and probation processes for sales staff
Assessment criteria	
The learner can:	
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: <ul style="list-style-type: none">• 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 outcome	The learner will:
2.	Be able to manage the induction and probation of new sales staff

Assessment criteria
The learner can: <ul style="list-style-type: none">2.1 Manage the induction and probation of new sales staff and their expectations in accordance with organisational procedures2.2 Agree targets with new sales staff for probationary period2.3 Use mentoring, coaching, or buddying systems in accordance with the induction programme2.4 Review the progress of new sales staff at agreed intervals and identify areas for development2.5 Provide feedback and support to new sales staff in accordance with identified developmental needs

Unit 314

Manage own professional development within an organisation

UAN:	L/600/9586
Level:	Level 3
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to Council for Administration Management NOS: M&LA2 Manage your own resources and professional development.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about managing your professional development in order to achieve your work objectives and your career and personal goals.

Learning outcome	The learner will:
1.	Be able to assess own career goals and personal development
Assessment criteria	
The learner can:	
1.1	Identify own career and personal goals
1.2	Assess how own career goals affect work role and professional development

Learning outcome	The learner will:
2.	Be able to set personal work objectives
Assessment criteria	
The learner can:	
2.1	Agree SMART (Specific, Measurable, Achievable, Realistic and Time-bound) personal work objectives in line with organisational objectives

Learning outcome	The learner will:
3.	Be able to produce a personal development plan
Assessment criteria	

The learner can:	
3.1	Identify gaps between objectives set, own current knowledge and skills
3.2	Produce a development plan

Learning outcome	The learner will:
4.	Be able to implement and monitor own personal development plan
Assessment criteria	
The learner can:	
4.1	Plan activities identified in own development plan
4.2	Explain how to monitor and review own personal development plan

UAN:	Y/600/9686
Level:	Level 3
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to Council for Administration Management NOS: M&LD11 Lead meetings.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about leading meetings in order to achieve their objectives, which may be to solve problems, take decisions, consult with people or to exchange information and knowledge.

Learning outcome	The learner will:
1. Be able to prepare to lead a meeting	
Assessment criteria	
The learner can:	
1.1 Perform activities needed to be carried out in preparation for leading a meeting	
1.2 Produce documentation in support of activities	

Learning outcome	The learner will:
2. Be able to manage meeting procedures	
Assessment criteria	
The learner can:	
2.1 Identify any formal procedures that apply in own organisation	

Learning outcome	The learner will:
3. Be able to chair a meeting	
Assessment criteria	
The learner can:	
3.1 Manage the agenda in co-operation with participants to ensure meeting objectives are met	
3.2 Produce minutes of the meeting and allocate action points after	

discussions

Learning outcome	The learner will:
4.	Be able to undertake post-meeting tasks
Assessment criteria	
The learner can:	
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

Unit 316

Organise the delivery of reliable customer service

UAN:	Y/601/1230
Level:	Level 3
Credit value:	6
GLH:	40
Relationship to NOS:	This unit is linked to Council for Administration Customer Service NOS: Unit B10 Organise the delivery of reliable customer service.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about how to deliver and maintain excellent and reliable customer service.

Learning outcome	The learner will:
1.	Be able to plan and organise the delivery of reliable customer service
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Be able to review and maintain customer service delivery
Assessment criteria	
The learner can:	
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
- 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

Learning outcome	The learner will:
3.	Be able to use recording systems to maintain reliable customer service
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
4.	Understand how to organise the delivery of reliable customer service
Assessment criteria	
The learner can:	
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
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

Unit 401

Prioritising information for sales planning

UAN:	D/502/8651
Level:	Level 4
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS21 Prioritise information for sales planning.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	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.

Learning outcome	The learner will:
1.	Understand sources and types of information that support sales
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2.	Understand internal information that supports sales
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
3.	Be able to carry out a business audit of the internal and external sales environment
Assessment criteria	
The learner can:	
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 outcome	The learner will:
4.	Be able to use sales information to support the sales planning function
Assessment criteria	
The learner can:	
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

Unit 402

Monitoring and managing sales team performance

UAN:	M/502/8654
Level:	Level 4
Credit value:	5
GLH:	32
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS48 Monitor and evaluate sales team performance.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide knowledge and skills for monitoring and managing the performance of a sales team.

Learning outcome	The learner will:
1.	Understand methods of monitoring sales team performance
Assessment criteria	
The learner can:	
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 outcome	The learner will:
2.	Be able to manage performance of the sales team
Assessment criteria	
The learner can:	
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

Unit 403

Developing sales proposals

UAN:	A/502/8656
Level:	Level 4
Credit value:	5
GLH:	30
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS51 Develop sales proposals and quotations.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge and skills for preparing sales proposals for customers.

Learning outcome	The learner will:
1.	Understand how to write sales proposals
Assessment criteria	
The learner can:	
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 outcome	The learner will:
2.	Be able to develop sales proposals
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3.	Be able to evaluate the proposal
Assessment criteria	
The learner can:	
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

Unit 404

Building and retaining sales relationships

UAN:	F/502/8657
Level:	Level 4
Credit value:	5
GLH:	34
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS92 Build and retain effective sales relationships.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	The unit is designed to enable build strong relationships with customers and understand customer's needs and expectations more clearly by working in partnership with them.

Learning outcome	The learner will:
1.	Understand the benefits and risks of planning and investing in sales relationships
Assessment criteria	
The learner can:	
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 outcome	The learner will:
2.	Be able to build sales relationships
Assessment criteria	
The learner can:	
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 outcome	The learner will:
3.	Be able to retain sales customers
Assessment criteria	
The learner can:	
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

Unit 405

Developing and implementing sales support and customer service programmes

UAN:	L/502/8659
Level:	Level 4
Credit value:	5
GLH:	35
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS94 Build and deliver customer service and customer care support.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge and skills on how to ensure that high levels of sales and customer service support are delivered.

Learning outcome	The learner will:
1. Understand the requirement to provide sales support and customer service programmes	
Assessment criteria	
The learner can:	
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 outcome	The learner will:
2. Be able to develop sales support and/or customer service programmes	
Assessment criteria	

The learner can:

- 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 outcome	The learner will:
3. Be able to implement sales support and customer service programmes	
Assessment criteria	
The learner can: 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	

Unit 406

Recruiting sales team members

UAN:	L/502/8662
Level:	Level 4
Credit value:	4
GLH:	23
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS44 Recruit sales team members.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the skills involved in recruiting and selecting members of the sales team.

Learning outcome	The learner will:
	1. Understand the recruitment and selection process relating to sales
Assessment criteria	
	The learner can: 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 outcome	The learner will:
	2. Be able to prepare to recruit and select sales team members
Assessment criteria	
	The learner can: 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 outcome	The learner will:
3.	Be able to make selection decisions for sales team members
Assessment criteria	
The learner can:	
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

Unit 407

Develop, maintain and review personal networks

UAN:	R/600/9587
Level:	Level 4
Credit value:	4
GLH:	25
Relationship to NOS:	This unit is linked to Council for Administration Management NOS: M&LA3 Develop your personal networks.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about developing your personal networks to support both your current and future work.

Learning outcome	The learner will:
1. Understand the benefits of networking and the need for data privacy	
Assessment criteria	
The learner can:	
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.	

Learning outcome	The learner will:
2. Be able to develop a personal network of contacts	
Assessment criteria	
The learner can:	
2.1 Develop networks that will provide personal and organisational benefit.	
2.2 Develop guidelines for working with networks in line with organisational procedures	

Learning outcome	The learner will:
3. Be able to review networking relationships	
Assessment criteria	

The learner can:

- 3.1 Assess the value own current personal network.
- 3.2 Evaluate own experience with existing contacts and use these to inform future actions

Unit 408

Support learning and development within own area of responsibility

UAN:	M/600/9676
Level:	Level 4
Credit value:	5
GLH:	25
Relationship to NOS:	This unit is linked to Council for Administration Management NOS: M&LD7 Provide learning opportunities for colleagues.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about supporting colleagues in identifying their learning needs and helping to provide opportunities to address these needs.

Learning outcome	The learner will:
1. Be able to identify the learning needs of colleagues in own area of responsibility	
Assessment criteria	
The learner can:	
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

Learning outcome	The learner will:
2. Understand how to develop a learning environment in own area of responsibility	
Assessment criteria	
The learner can:	
2.1	Explain the benefits of continual learning and development.
2.2	Explain how learning opportunities can be provided for own area of responsibility

Learning outcome	The learner will:
3. https://rits.ofqual.gov.uk/Units/LearningOutcomes/Details/472923 Be able to support colleagues in learning and its application	
Assessment criteria	
The learner can:	
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 outcome	The learner will:
4. Be able to evaluate learning outcomes and future learning and development of colleagues	
Assessment criteria	
The learner can:	
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	



Appendix 1 Relationships to other qualifications

Links to other qualifications

Mapping is provided as guidance and suggests areas of commonality between the qualifications. It does not imply that candidates completing units in one qualification have automatically covered all of the content of another.

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications.

These qualifications have connections to the:

- old Level 3 NVQ in Sales (6770-02)
- new 7712 & 7734 in Marketing
- new 4430 & 4417 in Customer Service
- new 3412 in Contact Centres

Literacy, language, numeracy and ICT skills development

These qualifications can develop skills that can be used in the following qualifications:

- Functional Skills (England) – see **www.cityandguilds.com/functionalskills**
- Essential Skills (Northern Ireland) – see **www.cityandguilds.com/essentialskillsni**
- Essential Skills Wales (from September 2010).



Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on **www.cityandguilds.com**.

Providing City & Guilds qualifications – a guide to centre and qualification approval contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden**
Find out how to register and certificate candidates on line
- **Qualifications and Credit Framework (QCF)**
Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs

- **Events**

Contains dates and information on the latest Centre events

- **Online assessment**

Contains information on how to register for GOLLA assessments.

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Useful contacts

UK learners

General qualification information

T: +44 (0)844 543 0033

E: **learnersupport@cityandguilds.com**

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: **intcg@cityandguilds.com**

Centres

Exam entries, Certificates,
Registrations/enrolment, Invoices,
Missing or late exam materials,
Nominal roll reports, Results

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: **centresupport@cityandguilds.com**

Single subject qualifications

Exam entries, Results, Certification,
Missing or late exam materials,
Incorrect exam papers, Forms
request (BB, results entry), Exam
date and time change

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: **singlesubjects@cityandguilds.com**

International awards

Results, Entries, Enrolments,
Invoices, Missing or late exam
materials, Nominal roll reports

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: **intops@cityandguilds.com**

Walled Garden

Re-issue of password or username,
Technical problems, Entries,
Results, GOLLA, Navigation,
User/menu option, Problems

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: **walledgarden@cityandguilds.com**

Employer

Employer solutions, Mapping,
Accreditation, Development Skills,
Consultancy

T: +44 (0)121 503 8993

E: **business_unit@cityandguilds.com**

Publications

Logbooks, Centre documents,
Forms, Free literature

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