

# City & Guilds Level 3 NVQ Certificate/ Diploma in Sales (6801-03/04)

April 2022 Version 1.1



## Qualification at a glance

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

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

| <b>Version and date</b> | <b>Change detail</b>                  | <b>Section</b> |
|-------------------------|---------------------------------------|----------------|
| V1.0 February 2011      | Launch                                |                |
| V1.1 April 2022         | GLH and TQT clarified and highlighted | Throughout     |



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# 1 Introduction

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

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

## 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     | <b>25</b>                  | 6                           | 10 (min)                   | 9 (max)                    |
| min of 15 credits must be at level 3 |                            |                             |                            |                            |
| Level 3 NVQ Diploma in Sales         | <b>37</b>                  | 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.

## Total Qualification Time

Total Qualification Time (TQT) is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

TQT is comprised of the following two elements:

- 1) The number of hours which an awarding organisation has assigned to a qualification for Guided Learning, and
- 2) An estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by - but, unlike Guided Learning, not under the Immediate Guidance or Supervision of - a lecturer, supervisor, tutor or other, appropriate provider of education or training

| Title and level                                      | GLH | TQT |
|--|-----|-----|
| City & Guilds Level 3 Certificate in Sales (6801-03) | 141 | 250 |
| City & Guilds Level 3 Diploma in Sales (6801-04)     | 210 | 370 |

**Unit Group Key:**

**A - Mandatory**

**B - Optional Group B**

**C - Optional Group C**

| City & Guilds<br>unit number | Ofqual unit<br>accreditation<br>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<br>unit number | Ofqual unit<br>accreditation<br>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 (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 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 NVQ or competence-based qualification, '... may be based on either candidate performance at work or through RWE, as necessary'.<sup>1</sup>

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
- 

<sup>1</sup> 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](http://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 | 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        |

| <b>Unit number</b> | <b>Unit title</b>  | <b>Credits</b> | <b>Unit number (UAN)</b> |
|--------------------|--|----------------|--------------------------|
| 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

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

|                            |  |
|----------------------------|--|
| <b>Learning outcome</b>    | The learner will:  |
| 1.                         | Understand how to manage and prioritise time in a sales role                 |
| <b>Assessment criteria</b> |  |
| 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              |

|                            |  |
|----------------------------|--|
| <b>Learning outcome</b>    | The learner will:  |
| 2.                         | Be able to plan own time in a sales role   |
| <b>Assessment criteria</b> |  |
| 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 |

|  |                   |
|--|-------------------|
| <b>Learning outcome</b>  | The learner will: |
| 3. Be able to evaluate time planning in a sales role   |                   |
| <b>Assessment criteria</b>   |                   |
| 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

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

|   |  |
|---|--|
| <b>Learning outcome</b>   | The learner will:  |
| 1. Understand the legal, regulatory and ethical requirements in a sales or marketing role |  |
| <b>Assessment criteria</b>  |  |
| 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                       |

|  |                   |
|--|-------------------|
| <b>Learning outcome</b>  | 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**

The learner can:

- 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

## Unit 209

## Selling at exhibitions

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

|   |  |
|---|--|
| <b>Learning outcome</b>   | The learner will:  |
| 1. Understand how to assess the relevance of exhibitions for the organisation |  |
| <b>Assessment criteria</b>  |  |
| 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                                  |

|  |  |
|--|--|
| <b>Learning outcome</b>                                  | The learner will:  |
| 2. Understand how to prepare for and sell at exhibitions |  |
| <b>Assessment criteria</b>                               |  |
| 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   |

|   |   |
|---|---|
| <b>Learning outcome</b>                 | The learner will:   |
| 3. Be able to prepare for an exhibition |   |
| <b>Assessment criteria</b>              |   |
| 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         |

|                                     |   |
|-------------------------------------|---|
| <b>Learning outcome</b>             | The learner will:   |
| 4. Be able to sell at an exhibition |   |
| <b>Assessment criteria</b>          |   |
| 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 |

|   |   |
|---|---|
| <b>Learning outcome</b>                                 | The learner will:   |
| 5. Be able to evaluate own performance at an exhibition |   |
| <b>Assessment criteria</b>                              |   |
| 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

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

|                            |  |
|----------------------------|--|
| <b>Learning outcome</b>    | The learner will:  |
| 1.                         | Be able to investigate customer after sales needs  |
| <b>Assessment criteria</b> |  |
| 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 |

|                            |  |
|----------------------------|--|
| <b>Learning outcome</b>    | The learner will:  |
| 2.                         | Be able to handle customers' after sales needs   |
| <b>Assessment criteria</b> |  |
| 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   |

|  |                   |
|--|-------------------|
| <b>Learning outcome</b>  | The learner will: |
| 3. Be able to review the after sales process   |                   |
| <b>Assessment criteria</b>   |                   |
| 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

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

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

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 2. Be able to understand communication techniques and methods                                 |                   |
| <b>Assessment criteria</b>  |                   |
| 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                           |                   |

|  |                   |
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| <b>Learning outcome</b>  | The learner will: |
| 3. Be able to communicate information and knowledge using appropriate techniques and methods |                   |
| <b>Assessment criteria</b>   |                   |
| 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

|  |  |
|--|--|
| <b>Learning outcome</b>  | The learner will:  |
| 4. Be able to adapt communication techniques and methods according to target audience response |  |
| <b>Assessment criteria</b>   |  |
| 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

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

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|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 1. Understand how to handle objections and negotiate with the customer              |                   |
| <b>Assessment criteria</b>  |                   |
| 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           |                   |

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 2. Be able to prepare for objections and negotiation with the customer                              |                   |
| <b>Assessment criteria</b>  |                   |
| 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

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 3. Be able to handle objections   |                   |
| <b>Assessment criteria</b>  |                   |
| 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 |                   |

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|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 4. Be able to negotiate with the customer   |                   |
| <b>Assessment criteria</b>  |                   |
| 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 |                   |

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 5. Be able to close the sale following negotiation  |                   |
| <b>Assessment criteria</b>  |                   |
| 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

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|--|--|
| <b>UAN:</b>  | R/502/8615   |
| <b>Level:</b>  | Level 3  |
| <b>Credit value:</b>   | 4  |
| <b>GLH:</b>  | 24   |
| <b>Relationship to NOS:</b>  | This unit is linked to Council for Administration Sales NOS: SLS11 Obtain and analyse sales-related information.   |
| <b>Assessment requirements specified by a sector or regulatory body:</b> | This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.<br>For those assessment criteria which are performance related the most likely form of evidence is assessor observation. |
| <b>Aim:</b>  | 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.            |

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| <b>Learning outcome</b>                             | The learner will:  |
| 1. Understand the uses of sales-related information |  |
| <b>Assessment criteria</b>                          |  |
| 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             |

|   |   |
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| <b>Learning outcome</b>   | The learner will:   |
| 2. Understand how to use tools and methods to analyse sales-related information |   |
| <b>Assessment criteria</b>  |   |
| 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 |

|   |   |
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| <b>Learning outcome</b>   | The learner will:   |
| 3. Be able to obtain sales-related information about customers, markets and competitors |   |
| <b>Assessment criteria</b>  |   |
| 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 |

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| <b>Learning outcome</b>  | The learner will:  |
| 4. Be able to use tools and methods to analyse sales-related information |  |
| <b>Assessment criteria</b>   |  |
| 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

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

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| <b>Learning outcome</b>   | The learner will:   |
|   | 1. Understand how to validate information about competitors |
| <b>Assessment criteria</b>  |   |
| 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 |   |

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| <b>Learning outcome</b>  | The learner will:   |
|  | 2. Understand the uses of competitor information for sales-related activities |
| <b>Assessment criteria</b>   |   |
| 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           |   |

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| <b>Learning outcome</b>  | The learner will: |
| 3. Be able to use competitor information for sales-related activities                                |                   |
| <b>Assessment criteria</b>   |                   |
| 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

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| <b>UAN:</b>  | K/502/8622   |
| <b>Level:</b>  | Level 3  |
| <b>Credit value:</b>   | 3  |
| <b>GLH:</b>  | 27   |
| <b>Relationship to NOS:</b>  | This unit is linked to Council for Administration Sales NOS.   |
| <b>Assessment requirements specified by a sector or regulatory body:</b> | This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.<br>For those assessment criteria which are performance related the most likely form of evidence is assessor observation. |
| <b>Aim:</b>  | 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.                |

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| <b>Learning outcome</b>  | The learner will:  |
| 1. Understand the impact of different models of buyer behaviour on the sales cycle |  |
| <b>Assessment criteria</b>   |  |
| 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 |

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| <b>Learning outcome</b>   | The learner will: |
| 2. Be able to respond to the buyer at each stage of the decision making process |                   |
| <b>Assessment criteria</b>  |                   |

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

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

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| <b>Learning outcome</b>  | The learner will:  |
| 1. Understand how to plan the use of digital media for a specific message, audience and recipients |  |
| <b>Assessment criteria</b>   |  |
| 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  |

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 2. Be able to plan the use of digital media for a specific message, audience and recipients |                   |
| <b>Assessment criteria</b>  |                   |

|                  |   |
|------------------|---|
| 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 |

|                            |   |
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| <b>Learning outcome</b>    | The learner will:   |
| 3.                         | Be able to check the digital message can be accessed and/or delivered                                   |
| <b>Assessment criteria</b> |   |
| 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               |

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

## Unit 306

## Pricing for sales promotions

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

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| <b>Learning outcome</b>  | The learner will: |
| 1. Understand price-based promotions   |                   |
| <b>Assessment criteria</b>   |                   |
| 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   |                   |

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|--|-------------------|
| <b>Learning outcome</b>  | The learner will: |
| 2. Be able to justify price-based promotions as part of a promotional strategy   |                   |
| <b>Assessment criteria</b>   |                   |
| 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 |                   |

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| <p>targets</p> <p>2.3 Identify how to gain internal support or guidance on implementing price-based promotions</p> |
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| <b>Learning outcome</b>  | The learner will: |
| 3. Be able to develop and present proposals for price-based promotions                               |                   |
| <b>Assessment criteria</b>   |                   |
| 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   |                   |

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 4. Understand how to evaluate price based promotions  |                   |
| <b>Assessment criteria</b>  |                   |
| 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                       |                   |

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| <b>Learning outcome</b>  | The learner will: |
| 5. Be able to implement and evaluate price-based promotions                                      |                   |
| <b>Assessment criteria</b>   |                   |
| 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

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

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| <b>Learning outcome</b>   | The learner will:  |
| 1. Understand the factors for consideration in the preparation of sales presentations |  |
| <b>Assessment criteria</b>  |  |
| 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 |

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| <b>Learning outcome</b>                    | The learner will:   |
| 2. Be able to prepare a sales presentation |   |
| <b>Assessment criteria</b>                 |   |
| 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 |

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| 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   |

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| <b>Learning outcome</b>  | The learner will: |
| 3. Understand how to deliver sales presentations   |                   |
| <b>Assessment criteria</b>   |                   |
| 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 |                   |

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| <b>Learning outcome</b>   | The learner will: |
| 4. Be able to deliver a sales presentation  |                   |
| <b>Assessment criteria</b>  |                   |
| 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

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

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| <b>Learning outcome</b>    | The learner will:   |
| 1.                         | Be able to develop a sales call plan  |
| <b>Assessment criteria</b> |   |
| 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   |

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| <b>Learning outcome</b>    | The learner will:  |
| 2.                         | Be able to undertake a sales call  |
| <b>Assessment criteria</b> |  |
| 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

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

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| <b>Learning outcome</b>    | The learner will:   |
| 1.                         | Understand the conditions for obtaining finance for purchases   |
| <b>Assessment criteria</b> |   |
| 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                       |

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| <b>Learning outcome</b>    | The learner will:  |
| 2.                         | Be able to propose financial options to customers        |
| <b>Assessment criteria</b> |  |
| The learner can:           |  |
| 2.1                        | Determine the customer's need for finance, the amount of |

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| <ul style="list-style-type: none"> <li>borrowing required and any special requirements or constraints</li> <li>2.2 Agree the preferred financial option with the customer</li> <li>2.3 Gather sufficient information to enable the application for finance to proceed</li> <li>2.4 Resolve shortfalls and inconsistencies in information supplied by the customer</li> <li>2.5 Provide the customer with opportunities to ask questions and raise concerns</li> </ul> |
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| <b>Learning outcome</b>  | The learner will: |
| 3. Be able to complete finance arrangements for purchases                                      |                   |
| <b>Assessment criteria</b>   |                   |
| 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

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

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| <b>Learning outcome</b>                            | The learner will:  |
| 1. Understand how to assess customer credit status |  |
| <b>Assessment criteria</b>                         |  |
| 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 |

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| <b>Learning outcome</b>                             | The learner will:   |
| 2. Be able to assess the credit status of customers |   |
| <b>Assessment criteria</b>                          |   |
| 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 |

|     |   |
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|     | 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   |

|                            |  |
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| <b>Learning outcome</b>    | The learner will:  |
| 3.                         | Be able to monitor the credit status of customers  |
| <b>Assessment criteria</b> |  |
| 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

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

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| <b>Learning outcome</b>    | The learner will:   |
| 1.                         | Understand the product development process  |
| <b>Assessment criteria</b> |   |
| 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  |

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| <b>Learning outcome</b>    | The learner will:   |
| 2.                         | Be able to contribute to the product and/or service development and launch process                                  |
| <b>Assessment criteria</b> |   |
| 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

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

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| <b>Learning outcome</b>    | The learner will:  |
| 1.                         | Be able to set targets for the sales or marketing team   |
| <b>Assessment criteria</b> |  |
| 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  |

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| <b>Learning outcome</b>    | The learner will:  |
| 2.                         | Be able to support the motivation of the sales or marketing team   |
| <b>Assessment criteria</b> |  |
| 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 |

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| <b>Learning outcome</b>   | The learner will: |
| 3. Be able to monitor and evaluate the progress of the sales or marketing team  |                   |
| <b>Assessment criteria</b>  |                   |
| 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

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

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| <b>Learning outcome</b>    | The learner will:   |
| 1.                         | Understand the induction and probation processes for sales staff  |
| <b>Assessment criteria</b> |   |
| 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"><li>• Induction and Probation</li><li>• Employment Rights and Responsibilities</li><li>• Timekeeping and Absence</li><li>• Health and Safety</li></ul> |
| 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   |

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| <b>Learning outcome</b> | The learner will:  |
| 2.                      | Be able to manage the induction and probation of new sales staff |

**Assessment criteria**

The learner can:

- 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

## Unit 314

## Manage own professional development within an organisation

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

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

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

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| <b>Learning outcome</b>    | The learner will:                                 |
|                            | 3. Be able to produce a personal development plan |
| <b>Assessment criteria</b> |   |

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| <p>The learner can:</p> <p>3.1 Identify gaps between objectives set, own current knowledge and skills</p> <p>3.2 Produce a development plan</p> |
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| <b>Learning outcome</b>  | The learner will: |
| 4. Be able to implement and monitor own personal development plan  |                   |
| <b>Assessment criteria</b>   |                   |
| <p>The learner can:</p> <p>4.1 Plan activities identified in own development plan</p> <p>4.2 Explain how to monitor and review own personal development plan</p> |                   |

## Unit 315

## Lead and manage meetings

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|--|--|
| <b>UAN:</b>  | Y/600/9686   |
| <b>Level:</b>  | Level 3  |
| <b>Credit value:</b>   | 4  |
| <b>GLH:</b>  | 20   |
| <b>Relationship to NOS:</b>  | This unit is linked to Council for Administration Management NOS: M&LD11 Lead meetings.  |
| <b>Assessment requirements specified by a sector or regulatory body:</b> | This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.<br>For those assessment criteria which are performance related the most likely form of evidence is assessor observation. |
| <b>Aim:</b>  | 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.  |

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| <b>Learning outcome</b>  | The learner will: |
| 1. Be able to prepare to lead a meeting  |                   |
| <b>Assessment criteria</b>   |                   |
| 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                                   |                   |

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

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| <b>Learning outcome</b>  | The learner will: |
| 3. Be able to chair a meeting  |                   |
| <b>Assessment criteria</b>   |                   |
| 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                          |                   |

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| discussions |
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| <b>Learning outcome</b>  | The learner will: |
| 4. Be able to undertake post-meeting tasks   |                   |
| <b>Assessment criteria</b>   |                   |
| 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

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

|                            |   |
|----------------------------|---|
| <b>Learning outcome</b>    | The learner will:   |
| 1.                         | Be able to plan and organise the delivery of reliable customer service  |
| <b>Assessment criteria</b> |   |
| 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   |

|                            |   |
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| <b>Learning outcome</b>    | The learner will:   |
| 2.                         | Be able to review and maintain customer service delivery  |
| <b>Assessment criteria</b> |   |
| 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                          |

|                            |  |
|----------------------------|--|
| <b>Learning outcome</b>    | The learner will:  |
| 3.                         | Be able to use recording systems to maintain reliable customer service                                     |
| <b>Assessment criteria</b> |  |
| 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  |

|                            |  |
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| <b>Learning outcome</b>    | The learner will:  |
| 4.                         | Understand how to organise the delivery of reliable customer service   |
| <b>Assessment criteria</b> |  |
| 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

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

|   |   |
|---|---|
| <b>Learning outcome</b>   | The learner will:   |
| 1. Understand sources and types of information that support sales |   |
| <b>Assessment criteria</b>  |   |
| 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                            |

|  |   |
|--|---|
| <b>Learning outcome</b>                                | The learner will:   |
| 2. Understand internal information that supports sales |   |
| <b>Assessment criteria</b>                             |   |
| 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 |

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 3. Be able to carry out a business audit of the internal and external sales environment   |                   |
| <b>Assessment criteria</b>  |                   |
| 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 |                   |

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 4. Be able to use sales information to support the sales planning function  |                   |
| <b>Assessment criteria</b>  |                   |
| 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

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

|                            |   |
|----------------------------|---|
| <b>Learning outcome</b>    | The learner will:   |
| 1.                         | Understand methods of monitoring sales team performance   |
| <b>Assessment criteria</b> |   |
| 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  |

|                            |   |
|----------------------------|---|
| <b>Learning outcome</b>    | The learner will:   |
| 2.                         | Be able to manage performance of the sales team   |
| <b>Assessment criteria</b> |   |
| 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

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

|  |   |
|--|---|
| <b>Learning outcome</b>                    | The learner will:   |
| 1. Understand how to write sales proposals |   |
| <b>Assessment criteria</b>                 |   |
| 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  |

|                                       |  |
|---------------------------------------|--|
| <b>Learning outcome</b>               | The learner will:  |
| 2. Be able to develop sales proposals |  |
| <b>Assessment criteria</b>            |  |
| 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

|  |                   |
|--|-------------------|
| <b>Learning outcome</b>  | The learner will: |
| 3. Be able to evaluate the proposal  |                   |
| <b>Assessment criteria</b>   |                   |
| 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

|  |  |
|--|--|
| <b>UAN:</b>  | F/502/8657   |
| <b>Level:</b>  | Level 4  |
| <b>Credit value:</b>   | 5  |
| <b>GLH:</b>  | 34   |
| <b>Relationship to NOS:</b>  | This unit is linked to Council for Administration Sales NOS: SLS92 Build and retain effective sales relationships.   |
| <b>Assessment requirements specified by a sector or regulatory body:</b> | This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.<br>For those assessment criteria which are performance related the most likely form of evidence is assessor observation. |
| <b>Aim:</b>  | 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.  |

|   |  |
|---|--|
| <b>Learning outcome</b>   | The learner will:  |
| 1. Understand the benefits and risks of planning and investing in sales relationships |  |
| <b>Assessment criteria</b>  |  |
| 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  |

|   |  |
|---|--|
| <b>Learning outcome</b>                 | The learner will:  |
| 2. Be able to build sales relationships |  |
| <b>Assessment criteria</b>              |  |
| 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                           |

|                            |   |
|----------------------------|---|
| <b>Learning outcome</b>    | The learner will:   |
| 3.                         | Be able to retain sales customers   |
| <b>Assessment criteria</b> |   |
| 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

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

|  |   |
|--|---|
| <b>Learning outcome</b>  | The learner will:   |
| 1. Understand the requirement to provide sales support and customer service programmes |   |
| <b>Assessment criteria</b>   |   |
| 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                                    |

|  |                   |
|--|-------------------|
| <b>Learning outcome</b>  | The learner will: |
| 2. Be able to develop sales support and/or customer service programmes |                   |
| <b>Assessment criteria</b>   |                   |

|  |
|--|
| <p>The learner can:</p> <p>2.1 Plan a sales support and customer service programme in accordance with the sales strategy</p> <p>2.2 Evaluate the effectiveness of existing processes for managing and providing service to customers against agreed criteria</p> <p>2.3 Develop a sales support or customer service programme, or recommend improvements to existing processes that meet the agreed criteria</p> <p>2.4 Establish resource requirements directly related to the sales area to deliver sales support and customer management to the agreed standard</p> |
|--|

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 3. Be able to implement sales support and customer service programmes   |                   |
| <b>Assessment criteria</b>  |                   |
| <p>The learner can:</p> <p>3.1 Identify appropriate ICT support for effective communication with customers</p> <p>3.2 Adapt to changing circumstances in implementing sales support and customer service programmes in accordance with the plan</p> <p>3.3 Record customer management information in accordance with organisational procedures</p> <p>3.4 Keep those concerned with sales support and customer service up to date with customer management information</p> <p>3.5 Ensure ongoing compliance with quality initiatives, processes and procedures and service level agreements as agreed between the customer and the organisation</p> <p>3.6 Take prompt action in the event of shortfalls in service standards in accordance with the sales strategy</p> |                   |

## Unit 406

## Recruiting sales team members

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

|                            |   |
|----------------------------|---|
| <b>Learning outcome</b>    | The learner will:   |
| 1.                         | Understand the recruitment and selection process relating to sales  |
| <b>Assessment criteria</b> |   |
| 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                                      |

|                            |   |
|----------------------------|---|
| <b>Learning outcome</b>    | The learner will:   |
| 2.                         | Be able to prepare to recruit and select sales team members                           |
| <b>Assessment criteria</b> |   |
| 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

|                            |   |
|----------------------------|---|
| <b>Learning outcome</b>    | The learner will:   |
| 3.                         | Be able to make selection decisions for sales team members                              |
| <b>Assessment criteria</b> |   |
| 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

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

|                            |  |
|----------------------------|--|
| <b>Learning outcome</b>    | The learner will:  |
| 1.                         | Understand the benefits of networking and the need for data privacy                                  |
| <b>Assessment criteria</b> |  |
| 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.                                       |

|                            |   |
|----------------------------|---|
| <b>Learning outcome</b>    | The learner will:   |
| 2.                         | Be able to develop a personal network of contacts                                   |
| <b>Assessment criteria</b> |   |
| 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 |

|                            |  |
|----------------------------|--|
| <b>Learning outcome</b>    | The learner will:                          |
| 3.                         | Be able to review networking relationships |
| <b>Assessment criteria</b> |  |

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

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

|   |  |
|---|--|
| <b>Learning outcome</b>   | The learner will:  |
| 1. Be able to identify the learning needs of colleagues in own area of responsibility |  |
| <b>Assessment criteria</b>  |  |
| 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  |

|   |   |
|---|---|
| <b>Learning outcome</b>   | The learner will:   |
| 2. Understand how to develop a learning environment in own area of responsibility |   |
| <b>Assessment criteria</b>  |   |
| 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 |

|  |                   |
|--|-------------------|
| <b>Learning outcome</b>  | The learner will: |
| 3. <a href="https://rits.ofqual.gov.uk/Units/LearningOutcomes/Details/472923">https://rits.ofqual.gov.uk/Units/LearningOutcomes/Details/472923</a> Be able to support colleagues in learning and its application |                   |
| <b>Assessment criteria</b>   |                   |
| 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   |                   |

|   |                   |
|---|-------------------|
| <b>Learning outcome</b>   | The learner will: |
| 4. Be able to evaluate learning outcomes and future learning and development of colleagues                      |                   |
| <b>Assessment criteria</b>  |                   |
| 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](http://www.cityandguilds.com/functionalskills)
- Essential Skills (Northern Ireland) – see [www.cityandguilds.com/essentialskillsni](http://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](http://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

- **Events**  
Contains dates and information on the latest Centre events
- **Online assessment**  
Contains information on how to register for GOLA assessments.

**City & Guilds**  
Skills for a brighter future



[www.cityandguilds.com](http://www.cityandguilds.com)

## Useful contacts

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### UK learners

General qualification information

T: +44 (0)844 543 0033

E: [learnersupport@cityandguilds.com](mailto:learnersupport@cityandguilds.com)

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### International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: [intcg@cityandguilds.com](mailto:intcg@cityandguilds.com)

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### 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](mailto:centresupport@cityandguilds.com)

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### 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](mailto:singlesubjects@cityandguilds.com)

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### 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](mailto:intops@cityandguilds.com)

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### 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](mailto:walledgarden@cityandguilds.com)

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### Employer

Employer solutions, Mapping,  
Accreditation, Development Skills,  
Consultancy

T: +44 (0)121 503 8993

E: [business\\_unit@cityandguilds.com](mailto:business_unit@cityandguilds.com)

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### Publications

Logbooks, Centre documents,  
Forms, Free literature

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

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## **About City & Guilds**

City & Guilds is the UK's leading provider of vocational qualifications, offering over 500 awards across a wide range of industries, and progressing from entry level to the highest levels of professional achievement. With over 8500 centres in 100 countries, City & Guilds is recognised by employers worldwide for providing qualifications that offer proof of the skills they need to get the job done.

## **City & Guilds Group**

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