QUALIFICATION HANDBOOK

Level 2 Certificate in Principles of Sales (7711-02)

October 2017
Version 1.4

City&
Guilds

Qualification at a glance

Subject area	Sales Technical Certificate
City & Guilds number	7711
Age group approved	All
Entry requirements	No entry requirements
Assessment	Assessment will be via assignment
Automatic approval	Available
Support materials	Qualification handbook Assessment pack Sample paper
Registration and certification	See Walled Garden/Online Catalogue for last dates

Title and level	GLH	TQT	City & Guilds number	Accreditation number
Level 2 Certificate in Principles of Sales	131	180	7711-02	600/0661/4

Version and date	Change detail	Section
1.2 Sep 2012	Addition of guidance for Assessors regarding oral questioning (recorded). Amendment to Unit 205 test spec.	Error! Reference source not found. Test specifications
1.3 Nov 2012	Updated guidance on internally marked questions	Internally marked questions
1.4 October 2017	Added GLH and TQT details Removed QCF	Introduction Throughout

Contents

1   Introduction

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

Area	Description
Who is the qualification for?	It is for learners who work or want to work in the sales sector.
What does the qualification cover?	It allows learners to learn, develop and practise the skills required for employment and/or career progression in the sales sector.
Is the qualification part of a framework or initiative?	It serves as a technical certificate, in the Sales Apprenticeship framework.
Who did we develop the qualification with?	It was developed in association with the Council for Administration.
What opportunities for progression are there?	It allows candidates to progress into employment or to the following City & Guilds qualifications: - Level 3 Certificate in Principles of Sales (7711-03) - Level 2/3 NVQ Certificate/Diploma in Sales (6801-01/02/03/04) - Level 2/3 NVQ Certificate/Diploma in Marketing (7712-02/03/04) - Level 2/3 Certificate in Principles of Marketing (7734-02/03) - Level 2/3 NVQ Certificate/Diploma in Business and Administration (4428-02/03) - Level 2/3 Certificate in Principles of Business and Administration (4475-02/03)

Structure

To achieve the **Level 2 Certificate in Principles of Sales (7711-02**), learners must achieve **14** credits from the mandatory units and a minimum of **4** credits from the optional units available. Units 206 and 207 cannot be taken together.

Unit accreditation number	City & Guilds unit number	Unit title	Credit value	Excluded combination of units (if any)
Mandatory units				
T/502/8204	201	Understanding the sales environment	3	
A/502/8205	202	Understanding sales techniques and processes	5	

Unit accreditation number	City & Guilds unit number	Unit title	Credit value	Excluded combination of units (if any)
F/502/8206	203	Understanding legal, regulatory and ethical requirements in sales or marketing	2	
L/601/7638	209	Principles of personal responsibilities and working in a business environment	4	
Optional units				
L/502/8208	204	Understanding sales targets	2	
R/502/8209	205	Understanding business awareness in sales	2	
L/502/8211	206	Principles of presentations and demonstrations in sales	2	This unit cannot be taken with unit 207
A/502/8219	207	Principles of selling at trade fairs and exhibitions	2	This unit cannot be taken with unit 206
J/502/8224	208	Customer service in sales	3	
F/502/8223	303	Understanding the relationship between sales and marketing	3	
Y/502/8227	304	Principles of online selling	3	
H/502/8232	305	Understanding customers' creditworthiness for sales purposes	2	
M/502/8234	306	Competitor analysis in the sales environment	2	

Total Qualification Time

Total Qualification Time (TQT) is the total amount of time, in hours, expected to be spent by a Learner to achieve a qualification. It includes both guided learning hours (which are listed separately) and hours spent in preparation, study and assessment.

Title and level	GLH	TQT
Level 2 Certificate in Principles of Sales	131	180

2   Centre requirements

Approval

If your Centre is approved to offer the qualification Level 2 in Sales (6849-20) you will have automatic approval for the new Level 2 Certificate in Principles of Sales (7711-02).

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 these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

* be technically competent in the areas for which they are delivering training and/or have experience of providing training. This knowledge must be at least to the same level as the training being delivered.

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

Continuing professional development (CPD)
Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

Candidate entry requirements

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

Age restrictions

There is no age restriction for this qualification unless this is a legal requirement of the process or the environment.

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.
- any units they have already completed, or credit they have accumulated which is relevant to the qualification.
- 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, their responsibilities as a learner, and the responsibilities of the centre. This information can be recorded on a learning contract.

Support materials

The following resources are available for this qualification:

Description	How to access
Assignment (Assessment) guide	City & Guilds website
Sample paper	City & Guilds website

4 Assessment

Assessment of the qualification

Candidates must:

- successfully complete one short-answer test for each mandatory and optional unit chosen

City & Guilds has written the following assessments to use with this qualification:

- short-answer tests
- a practice or sample paper, which can be downloaded from the City & Guilds website

Test specifications

Test 1: Unit 201
Duration: 1 hour 15 mins

Unit	Outcome	Number of questions	Weighting %
201	1 Understand the sales market	5	20
	2 Understand different types of business focus in sales and marketing	4	15
	3 Know how to manage time in the sales environment	4	15
	4 Understand the use of IT in sales	6	25
	5 Understand how to communicate information in a sales environment	6	25
	Total	**25**	**100**

Test 2: Unit 202
Duration: 2 hours

Unit	Outcome	Number of questions	Weighting %
202	1 Understand the sales cycle	3	6
	2 Understand the buyer decision-making process	5	10
	3 Understand how to generate and qualify sales leads	6	14
	4 Understand how to sell by inbound telephone call	7	14
	5 Understand how to sell by outbound telephone call	7	16
	6 Understand the principles of selling face to face	6	12
	7 Understand how to close a sale	7	14
	8 Understand how to process sales orders	7	14
	Total	**48**	**100**

Test 3: Unit 203
Duration: 1 hour

Unit	Outcome	Number of questions	Weighting %
203	1 Understand an organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing	7	47
	2 Understand the legal, regulatory and ethical limits of the sales or marketing role	8	53
	Total	**15**	**100**

Test 4: Unit 204
Duration: 1 hour

Unit	Outcome	Number of questions	Weighting %
204	1 Understand how sales targets are calculated	5	33
	2 Understand the use of sales targets	2	13
	3 Understand how to collect sales-related data	4	27
	4 Understand how to evaluate sales performance	4	27
	Total	**15**	**100**

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Test 5: Unit 205
Duration: 1 hour

Unit	Outcome	Number of questions	Weighting %
205	1 Understand business issues in the sales environment	4	25
	2 Understand the importance of business news in the sales environment	4	25
	3 Understand the use of networking in sales	5	50
	Total	**13**	**100**

Test 6: Unit 206
Duration: 1 hour

Unit	Outcome	Number of questions	Weighting %
206	1 Understand how to prepare for a sales presentation or demonstration	4	30
	2 Understand how to deliver a sales presentation or demonstration	7	47
	3 Understand the role of evaluating sales presentations/demonstrations	4	23
	Total	**15**	**100**

Test 7: Unit 207
Duration: 1 hour

Unit	Outcome	Number of questions	Weighting %
207	1 Understand the basis for deciding whether to participate in trade fairs and exhibitions	3	20
	2 Understand how prepare for trade fairs and exhibitions	6	40
	3 Understand techniques for selling at trade fairs and exhibitions	6	40
	Total	**15**	**100**

Test 8: Unit 208
Duration: 1 hour 30 mins

Unit	Outcome	Number of questions	Weighting %
208	1 Understand how to build long term relationships with customers	6	20
	2 Understand approaches to managing customer accounts	6	20
	3 Understand the importance of customer loyalty	6	20
	4 Understand the importance of the brand and organisational reputation	4	13
	5 Understand how to meet the customers' after-sales needs	8	27
	Total	**30**	**100**

Test 9: Unit 209
Duration: 1 hour 30 mins

Unit	Outcome	Number of questions	Weighting %
209	1 Know the employment rights and responsibilities of the employee and employer	7	24
	2 Understand the purpose of health, safety and security procedures in a business environment	4	13
	3 Understand how to communicate effectively with others	4	13
	4 Understand how to work with and support colleagues	4	13
	5 Know how to plan own work and be accountable to others	3	10
	6 Understand the purpose of improving own performance in a business environment and how to do so	3	10
	7 Understand the types of problems that may occur in a business environment and how to deal with them	5	17
	Total	**30**	**100**

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Test 12: Unit 303
Duration: 1 hour 15 mins

Unit	Outcome	Number of questions	Weighting %
303	1 Understand the impact of different organisational structures on sales and marketing functions	2	10
	2 Understand the interface between sales and marketing functions	7	35
	3 Understand the impact of sales and marketing on product development processes	12	55
	Total	**20**	**100**

Test 13: Unit 304
Duration: 1 hour

Unit	Outcome	Number of questions	Weighting %
304	1 Understand how to plan online selling	8	55
	2 Understand implementation issues in online selling	4	27.5
	3 Understand evaluation processes for online selling	3	17.5
	Total	**15**	**100**

Test 14: Unit 305
Duration: 1 hour

Unit	Outcome	Number of questions	Weighting %
305	1 Understand the process of assessing customers' creditworthiness	11	73
	2 Understand how customers' ongoing credit status is monitored	4	27
	Total	**15**	**100**

Test 15: Unit 306
Duration: 1 hour 15 mins

Unit	Outcome	Number of questions	Weighting %
306	1 Understand the use of sales-related information	3	15
	2 Understand the collection and storage requirements of sales-related information	6	30
	3 Understand the use of tools and methods for analysing quantitative and qualitative sales-related information	6	30
	4 Understand how the results of competitor analysis are used	5	25
	Total	**20**	**100**

Grading and marking

- The short-answer tests cover underpinning knowledge.
- All short-answer tests are internally marked and graded subject to internal and external moderation.
- The short-answer test for all units will be graded pass/ fail.
- Detailed marking criteria are provided in the marking guide for each short-answer test.

Please also refer to the assessment guidance document available on the City & Guilds website.

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Internally marked questions

The questions should be taken under supervised conditions as closed-book tests. This means that all activities will be completed with the assessor, or other designated supervisor, present. Alternatively, assessors may prefer to ask the questions orally and record individual candidates' responses. If an electronic recording device is used:

- the assessor and candidate must identify themselves at the start of the recording (including candidate full name, centre number, qualification and unit title and assessor name)
- the questions asked and candidate's responses must be clearly recorded
- the data files must be saved and filed in a manner that assures their security and ease of retrieval for verification purposes.

Test times should be adhered to whenever possible but allowances can be made for learners with specific needs where considered appropriate.

At the end of the assessment the assessor will make the recording using the marking scheme and submit the candidate's result to City & Guilds.

Any recording should be included in the centre's quality assurance process for the qualification.

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 (UAN)
- 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	Understanding the sales environment	3	T/502/8204
202	Understanding sales techniques and processes	5	A/502/8205
203	Understanding legal, regulatory and ethical requirements in sales or marketing	2	F/502/8206
204	Understanding sales targets	2	L/502/8208
205	Understanding business awareness in sales	2	R/502/8209
206	Principles of presentations and demonstrations in sales	2	L/502/8211
207	Principles of selling at trade fairs and exhibitions	2	A/502/8219
208	Customer service in sales	3	J/502/8224

Unit number	Unit title	Credits	Unit number (UAN)
209	Principles of personal responsibilities and working in a business environment	4	L/601/7638
303	Understanding the relationship between sales and marketing	3	F/502/8223
304	Principles of online selling	3	Y/502/8227
305	Understanding customers' creditworthiness for sales purposes	2	H/502/8232
306	Competitor analysis in the sales environment	2	M/502/8234

General unit guidance

Terminology may vary depending on organisation.

An organisation can refer to the organisation a candidate works at or any, unspecified organisation.

When 'characteristics' is not ranged it is referring to distinguishing features or qualities.

Unit 201 Understanding the sales environment

UAN:	**T/502/8204**
Level:	Level 2
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 54 Manage and prioritise time for sales activities SLS 85 Meet your customer's after sales needs
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding the sales market, business foci in sales and marketing, how to manage time in the sales environment, the use of IT in sales and how to communicate information in a sales environment

Learning outcome	The learner will:
1. understand the sales market	
Assessment criteria	
The learner can: 1.1 describe the **characteristics** of the sales market (eg hospitality, retail, business, public sector, not for profit sector) 1.2 explain the features, benefits and unique selling propositions of an organisation's products and/or services 1.3 describe an organisation's position in the market 1.4 describe an organisation's products and/or services in comparison with competitors' offerings.	

Range
Characteristics
Seasonal trends, type of customer eg age, gender, financial limitations and implications

Learning outcome	The learner will:
2. understand different types of business focus in sales and marketing	

Assessment criteria
The learner can:
2.1 describe the differences between product focus, production focus, sales focus and customer focus
2.2 explain the effect of customer focus in an organisation
2.3 describe how to overcome the **barriers** to achieving customer focus.

Range
Barriers
Internal – customer charter, staff, organisational attitude, financial
External – competition, market, financial

Learning outcome	The learner will:
3. know how to manage time in the sales environment	

Assessment criteria
The learner can:
3.1 explain the importance of effective time management and its impact on **business objectives**
3.2 explain how to differentiate between urgent and routine tasks
3.3 describe the **tools and techniques** available for effective time management.

Range
Business objectives
KPIs, sales targets, timescales
Tools and techniques
Use of diary, planner, delegating; control of environment, reviews and evaluation

Learning outcome	The learner will:
4. understand the use of IT in sales	

Assessment criteria
The learner can:
4.1 explain the role, uses and importance of **IT systems** and information in sales
4.2 describe how to plan and organise **information searches**
4.3 describe how to carry out a data audit
4.4 describe how to identify **issues and trends** in sales-related data
4.5 explain the implications of inaccurate sales data.

Range
IT systems
Customer relationship management systems (CRM), bespoke software, databases
Information searches
Internal, external.
Issues and trends
Fluctuations in sales, historical data, financial climate

Learning outcome	The learner will:
5. understand how to communicate information in a sales environment	
Assessment criteria	
The learner can:	

5.1 describe the **characteristics** of effective communication in a sales environment

5.2 describe the information needs of the target audience (colleagues and **customers**)

5.3 describe the importance of and reason for checking the audience's understanding

5.4 explain the importance and uses of **non-verbal communication** to the sale

5.5 describe the advantages and disadvantages of **different media** used to communicate with customers.

Range
Characteristics
Presentation, integrity, equality and diversity, language
Customers
Internal, external
Non-verbal communication
Body language, personal presentation, facial expression, eye contact
Different media
Written communication eg letters, texts, email; social networking and advertising

Unit 201 Understanding the sales environment

Supporting information

Guidance

1.2: Unique selling propositions, also called USPs. It is what makes a product/service different from any other product/service. It is what may convince a customer to switch brands. The candidate must cover features, benefits and USPs.

2.1: the candidate must explain what each means and then explain the differences between product focus, production focus, sales focus and customer focus.

2.2: could include increased sales, financial implications, time, repeat business, customer service.

2.3: the candidate must identify the barriers and show understanding of what is meant by customer focus. They should then show how the barriers can be overcome.

3.1: the candidate must cover both organisational and personal objectives.

4.2: information search is where data is looked for either electronically or manually.

4.3: data audit - the candidate must know the process within the organisation for carrying out a data audit and make an assessment of how fit for purpose an organisation's data is.

4.5: the candidate must give at least three examples of the impact of poor quality information on an organisation's efficiency.

5.2: the candidate must cover at least two different types of customer.

5.3: the candidate must ensure they describe both the importance and the reason.

5.5: the candidate must cover both advantages and disadvantages.

Unit 202　　Understanding sales techniques and processes

UAN:	A/502/8205
Level:	Level 2
Credit value:	5
GLH:	40
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 73 Sell products or services over the telephone SLS 76 Handle objections and close sales SLS 83 Process customer orders and payments
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding the sales cycle, the buyer decision-making process, how to generate and qualify sales leads, how to sell by inbound and outbound telephone calls, how to sell face to face, how to close a sale and how to process sales orders

Learning outcome	The learner will:
1. understand the sales cycle	

Assessment criteria

The learner can:
1.1　describe the **characteristics** of the sales cycle
1.2　explain how the different **stages of the sales cycle** affects the approach to the sale
1.3　describe the uses of the sales cycle in structuring and progressing **sales contacts.**

Range

Characteristics
Research products/services, initial contact, negotiation, agree and process sale

Stages of the sales cycle
Products/services on offer; identify customer, negotiate the sale of product/service, close and process sale following the organisational procedures, after-sales support

Sales contacts
New and existing leads

Learning outcome	**The learner will:**
2. understand the buyer decision-making process	
Assessment criteria	

The learner can:
2.1 describe an organisation's procedures for dealing with buyers
2.2 explain how **buyer behaviour** affects the achievement of targets
2.3 explain the distinction between customer wants and needs
2.4 explain the difference between consumer buyer decision-making and **business-to-business** decision-making
2.5 describe the **pressures** on customers that influence their buying behaviour.

Range
Buyer behaviour
When, where, why and how people decide to buy or not.
Business-to-business
Transactions between wholesaler and manufacturer; wholesaler and retailer
Pressures
Financial, need for product/service, seasonal, time restraints

Learning outcome	**The learner will:**
3. understand how to generate and qualify sales leads	
Assessment criteria	

The learner can:
3.1 explain how to **segment customers**
3.2 explain how to target market customers and **prospects**
3.3 describe how to **source** and gather information about the market and the prospect
3.4 explain the process for qualifying the sales contact
3.5 explain the importance of accurate record keeping.

Range
Customer segment
Gender, price, interests, lifestyle, age
Prospects
New, old and existing customers
Source
Internal, external

Learning outcome	The learner will:
4. understand how to sell by inbound telephone call	

Assessment criteria
The learner can:
4.1 explain the characteristics, advantages and disadvantages of **inbound telephone selling**
4.2 explain the characteristics of **reactive selling**
4.3 describe the verbal, listening and questioning techniques that are most suited to telephone selling
4.4 describe how to manage **customer behaviour** during inbound calls
4.5 describe how to interpret the customer's reaction as the sale progresses during inbound calls
4.6 describe how to involve the customer in closing the sale during inbound calls.

Range
Inbound telephone selling
From advertising campaign, through general enquiries
Reactive selling
Up-selling, cross-selling
Customer behaviour
Positive, negative

Learning outcome	The learner will:
5. understand how to sell by outbound telephone call	

Assessment criteria
The learner can:
5.1 describe the **preparations** to be made prior to telephone selling
5.2 explain the characteristics, advantages and disadvantages of **outbound telephone selling**
5.3 explain the characteristics of proactive selling
5.4 describe how to manage **customer behaviour** during outbound calls
5.5 describe how to interpret the customer's reaction as the sale progresses during outbound calls
5.6 describe how to involve the customer in closing the sale during outbound calls.

Range
Preparations
Customer data, product/service information, time
Outbound telephone selling
Cold calling, qualified leads, potential leads

Characteristics of proactive selling
Added value, personal skills of the seller, product/service knowledge
Customer behaviour
Positive, negative

Learning outcome	**The learner will:**
6. understand the principles of selling face to face	
Assessment criteria	
The learner can:	
6.1 explain the characteristics, advantages and disadvantages of face to face selling	
6.2 explain the importance of **preparing** for the contact	
6.3 describe the stages of selling face to face	
6.4 describe how to manage **customer behaviour** during face to face sales contacts	
6.5 describe how to interpret the customer's reaction as the sale progresses during face to face contacts	
6.6 describe how to involve the customer in closing the sale during face to face contacts.	

Range
Preparing
Pre-arranged meeting or drop-in customer
Customer behaviour
Positive, negative

Learning outcome	**The learner will:**
7. understand how to close a sale	
Assessment criteria	
The learner can:	
7.1 explain how to overcome **objections**	
7.2 explain how to identify verbal and non-verbal buying signals	
7.3 explain how to overcome **barriers** to closing the sale	
7.4 explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale	
7.5 describe different methods of closing sales.	

Range
Objections
Price, features, physical delivery of product/service, benefits
Barriers
Price, needs, availability, organisational procedures

Learning outcome	The learner will:
8. understand how to process sales orders	

Assessment criteria

The learner can:

8.1 describe the process for ordering products and/or services

8.2 describe an organisation's **payment methods**

8.3 describe the requirements of customer **credit checks**

8.4 explain the role of the despatch function

8.5 describe **order completion** service standards

8.6 describe the importance of **discounts** and **special offers**

8.7 describe the importance of keeping the customer informed of **developments** relating to their order.

Range

Payment methods

Electronic, account, cash

Credit checks

Identification requirements, credit scoring

Order completion

Receipting, delivery, quality checks, returns process, follow up to check customer satisfaction

Discounts

Pre-set, negotiated

Special offers

Loyalty offers, nationwide, BOGOF

Developments

Delays, alternatives

Unit 202 Understanding sales techniques and processes

Supporting information

Guidance

1.1: sales cycle, the sequence of phases the customer goes through when deciding to buy.

1.2: this should be in relation to the organisation's sales cycle.

Overall Learning Outcome 2 - the buyer in this instance is the customer.

2.1: the organisation's procedures could include contracts, negotiations, service/customer charter.

2.4: the candidate must cover both consumer buyer decision-making and business-to-business decision-making.

2.5: the candidate must describe at least two pressures and how each influences the buyer's behaviour.

3.4: qualifying is confirming the status of the lead/contact.

4.1: the candidate must cover characteristics, advantages and disadvantages.

4.3: the candidate must ensure they describe one each of verbal, listening and questioning techniques.

4.5: the candidate must ensure they cover both positive and negative reactions.

4.6: the candidate must describe how they involve the customer in leading to positive closure be it to a final sale, follow up.

5.2: the candidate must cover characteristics, advantages and disadvantages

5.5: the candidate must ensure they cover both positive and negative customer reaction.

5.6: the candidate must describe how they involve the customer in leading to positive closure be it to a final sale, follow up.

6.1: the candidate must ensure they cover two each of characteristics, advantages and disadvantages of face to face selling.

6.2: this should be relevant to the organisation.

6.3: stages should be relevant to the organisation.

6.5: the candidate must ensure they cover both positive and negative customer reaction.

6.6: the candidate must describe how they involve the customer in leading to positive closure be it to a final sale, follow up.

7.1: customer objections should be during negotiation for the sale.

7.2: the candidate must identify at least two of both verbal and non-verbal buying signals

7.3: the candidate must explain at least two barriers and how they can be overcome. Barriers should be specifically related to closing the sale.

7.4: the candidate must show understanding of what is meant by add-on, up-selling and cross-selling and how they can each be identified as opportunities prior to closing the sale.

7.5: methods should be dependant on the organisation.

8.1, 8.4, 8.5: the process should be dependant on the organisation.

Unit 203 Understanding legal, regulatory and ethical requirements in sales or marketing

UAN:	F/502/8206
Level:	Level 2
Credit value:	2
GLH:	15
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 77 Ensure compliance with legal, regulatory, ethical and social requirements
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding an organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing and the legal, regulatory and ethical limits of the role

Learning outcome	The learner will:
1. understand an organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing	
Assessment criteria	
The learner can:	
1.1 describe an organisation's procedures for raising legal, regulatory and ethical concerns	
1.2 explain the scope of legal, regulatory and ethical requirements in sales or marketing	
1.3 explain how the **legal, regulatory and ethical requirements** relate to the business of selling or marketing	
1.4 describe **internal and external sources** of information on legal, regulatory and ethical requirements	
1.5 explain how an 'ethical approach' affects organisations in the sales or marketing environment	
1.6 explain the importance of contract law in sales.	

Range
Scope
Procedures, actions, processes

Legal requirements

Health and Safety at Work Act, Working Time Directive and employment legislation, Copyright Laws, Equality Act, Data Protection Act

Regulatory requirements

FSA regulations

Ethical requirements

Moral, political, material

Internal sources

Intranet, HR Dept, Company handbook

External sources

Government bodies, trade associations, Health & Safety Executive, Office for Disability Issues

Learning outcome	The learner will:
2. understand the legal, regulatory and ethical limits of the sales or marketing role	
Assessment criteria	
The learner can:	
2.1 explain the legal, regulatory and ethical requirements relevant to the role	
2.2 describe the potential consequences of not complying with **legal, regulatory or ethical requirements**	
2.3 explain the importance of working within the limits of the role, responsibilities and authority	
2.4 explain the process for reporting legal, regulatory and ethical concerns	
2.5 explain the importance of clarity of communication with the customer to ensure common understanding of agreements and expectations.	

Range
Legal requirements
Health and Safety at Work Act, Working Time Directive and employment legislation, Copyright Laws, Equality Act, Data Protection Act
Regulatory requirements
FSA regulations
Ethical requirements
Moral, political, material

Unit 203 Understanding legal, regulatory and ethical requirements in sales or marketing

Supporting information

Guidance

1.5: the candidate must also show understanding of what is meant by an ethical approach.

1.6: the candidate must also show understanding of what is meant by contract law including cooling off period.

2.1: the candidate must be aware of all the legislation, regulations in the range and how they are relevant to their job role.

2.3: the candidate must show an understanding of what is meant by each as well as explaining the importance of working within the limits of each.

2.4: the candidate must explain at least **three** stages of the reporting process.

Unit 204   Understanding sales targets

UAN:	**L/502/8208**
Level:	Level 2
Credit value:	2
GLH:	13
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 31 Forecasting sales and setting sales targets
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding how sales targets are calculated, how to collect sales-related data, the use of sales targets and how to evaluate sales performance

Learning outcome	**The learner will:**
1. understand how sales targets are calculated	
Assessment criteria	
The learner can: 1.1 describe the process for forecasting sales and setting sales targets 1.2 describe the **factors** that affect the setting of sales targets 1.3 explain the **volume and value** of the sales required to meet target figures 1.4 explain the pricing structure for products and/or services to meet sales targets 1.5 describe a formula for calculating sales values over a period of time.	

Range
Factors   New product/service, historical data, global, economic   **Volume and value**   Financial facts and figures

Learning outcome	The learner will:
2. understand the use of sales targets	
Assessment criteria	
The learner can: 2.1 explain the importance of sales targets for performance purposes 2.2 explain how past sales targets can inform the setting of future targets.	

Learning outcome	The learner will:
3. understand how to collect sales-related data	
Assessment criteria	
The learner can: 3.1 describe the potential sources of **sales-related data** 3.2 explain the **data collection methods** for obtaining quantitative and qualitative information 3.3 describe how **data** can be used to support sales activities.	

Range
Sales related data
Customer data, competitor information, sales figures, product/service information, product/service availability
Data collection methods
Paper, electronic

Learning outcome	The learner will:
4. understand how to evaluate sales performance	
Assessment criteria	
The learner can: 4.1 describe how to monitor sales performance against targets 4.2 explain how to evaluate performance against targets 4.3 describe the **factors** that can cause **variances** of performance from target 4.4 describe the **actions** to be taken if sales targets are not met.	

Range
Factors
External, internal
Variances
Unexpected figures/results
Actions
Personal development/support, reviews

Unit 204   Understanding sales targets

Supporting information

Guidance

1.1: the candidate must look at both organisational and personal targets.

1.3: the candidate must be able to explain both volume and value and do so through examples.

1.4: the candidate must be able to explain at least **two** different types of pricing structures.

1.5: this should be dependant on the organisation. Formula refers to the method.

2.2: the candidate must be able to use at least **two** different types of past sales targets to inform the setting of future targets.

3.2: the candidate must show understanding of what is meant by quantitative and qualitative information.

4.1: this should be dependant on the organisation.

4.2: the candidate must show an understanding of how the organisation evaluates performance eg appraisal, 1-2-1s.

4.3: the candidate must describe at least **two** factors.

Unit 205 Understanding business awareness in sales

UAN:	R/502/8209
Level:	Level 2
Credit value:	2
GLH:	11
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 55 Develop your personal networks
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding business issues in the sales environment, the importance of business news and the use of networking in sales

Learning outcome	The learner will:
1. understand business issues in the sales environment	
Assessment criteria	
The learner can: 1.1 describe different approaches to business awareness in different **types of organisations** 1.2 describe the relationship of the sales function with other **business functions** in an organization.	

Range
Types of organisations
Private – multinational and SME, public sector, not for profit
Business functions
Marketing, finance, HR, distribution, buying.

Learning outcome	The learner will:
2. understand the importance of business news in the sales environment	
Assessment criteria	
The learner can: 2.1 describe how **news items** affect business 2.2 describe who should receive sales-related business news in an organisation	

2.3	describe internal and external sources of information on business news.

Range
News items
Local, international, current, past

Learning outcome	**The learner will:**
3. understand the use of networking in sales	
Assessment criteria	
The learner can:	
3.1 describe the purpose of **networking**	
3.2 explain the advantages and disadvantages of different types of **networking**	
3.3 explain how to use networks to build business awareness	
3.4 explain the importance of **mutual benefits and integrity** in business conducted through **networking**.	

Range
Networking
Internet social networking, business networking
Mutual benefits and integrity
Personal, organisational

Unit 205　　Understanding business awareness in sales

Supporting information

Guidance

2.3: the candidate must be able to describe at least **two** of each.

- Internal sources could include: Intranet, customers, newsletters, meetings.
- External sources could include: Internet, media (TV, radio, newspapers), trade journals, customers.

3.1: the candidate must cover at least **three** different types of social networking.

3.2: the candidate must cover both advantages and disadvantages.

Unit 206 Principles of presentations and demonstrations in sales

UAN:	**L/502/8211**
Level:	Level 2
Credit value:	2
GLH:	15
Relationship to NOS:	This unit is linked to Council for Administration NOS: SLS 53 Develop and deliver a professional sales presentation
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding how to prepare for and deliver a sales presentation or demonstration and the role of evaluating sales presentations/demonstrations

Learning outcome	The learner will:
1. understand how to prepare for a sales presentation or demonstration	
Assessment criteria	

The learner can:

1.1 describe how organisational sales strategies, plans and activities are relevant to the presentation/demonstration

1.2 describe how the presentation/demonstration is intended to help meet sales targets

1.3 describe the features and benefits of the products and/or services to be promoted

1.4 explain how to set up the venue and equipment to be used for the presentation/demonstration.

Learning outcome	The learner will:
2. understand how to deliver a sales presentation or demonstration	
Assessment criteria	

The learner can:

2.1 explain how to identify an **audience's** wants, needs and likely interests

2.2 explain how to **deliver** a presentation/demonstration in a way that meets an **audience's** information needs and captures and retains their attention

2.3 explain the importance of anticipating and meeting problems,

	constraints and objections
2.4	explain why it is important to provide an audience with opportunities to raise questions and objections
2.5	explain how gaining commitment contributes to the achievement of a sale.

Range
Audience
Single customer and/or large group
Deliver
Method of delivery

Learning outcome	**The learner will:**
3. understand the role of evaluating sales presentations/ demonstrations	
Assessment criteria	
The learner can:	
3.1 describe how the effectiveness of sales presentations/demonstrations is evaluated	
3.2 explain how evaluative information is used to contribute to enhanced sales performance.	

Unit 206   Principles of presentations and demonstrations in sales

Supporting information

Guidance

1.1: the sales strategy should be relevant to the candidate's area of responsibility.

1.3: the candidate must be able to describe the features and benefits of at least **two** products and/or services.

1.4: the candidate must be able to explain how to set up for the presentation/demonstration in at least **two** different venues. It could be an internal or an external venue.

2.3: the candidate must be able to explain at least **two** problems, **two** constraints and **two** objections.

Unit 207 Principles of selling at trade fairs and exhibitions

UAN:	A/502/8219
Level:	Level 2
Credit value:	2
GLH:	18
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 63 Sell products and services at trade fairs, exhibitions or conferences
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding the basis for deciding whether to participate in trade fairs and exhibitions, how to prepare for trade fairs and exhibitions and techniques for selling at trade fairs and exhibitions

Learning outcome	The learner will:
1. understand the basis for deciding whether to participate in trade fairs and exhibitions	
Assessment criteria	
The learner can: 1.1 explain the purpose of exhibitions and trade fairs 1.2 describe how an organisation's sales plans and targets relate to a trade fair or exhibition 1.3 explain how the **cost** of participation is weighed against the likely sales that may be achieved.	

Range
Cost
Of time, material, booking cost, historical sales/achievements

Learning outcome	The learner will:
2. understand how to prepare for trade fairs and exhibitions	
Assessment criteria	
The learner can: 2.1 describe the resources needed for participation 2.2 describe how targets are set for exhibitions and trade fairs 2.3 explain how actual and potential customers are informed of	

forthcoming events

2.4 explain how to identify opportunities for **collaborative selling** with other exhibitors

2.5 explain the importance of identifying potential competitors and threats to sales from other exhibitors.

Range
Collaborative selling
Suppliers, other exhibitors

Learning outcome	The learner will:
3. understand techniques for selling at trade fairs and exhibitions	
Assessment criteria	
The learner can: 3.1 describe how displays are arranged and presented to attract potential customers 3.2 describe techniques for engaging potential customers' attention quickly 3.3 explain how sales lead information is identified, captured and followed up 3.4 explain how to adapt sales techniques to suit the environment of trade fairs and exhibitions 3.5 explain the importance of post-event follow up with potential customers.	

Unit 207　　　　Principles of selling at trade fairs and exhibitions

Supporting information

Guidance

2.1: the candidate must cover at least **five** resources.

3.3: the candidate must show understanding of what is meant by sales lead information and the process the organisation follows. The sales lead information refers to the potential customer information collected at the trade fair/exhibition.

3.4: the candidate must identify at least **two** sales techniques and how they will be adapted.

3.5: follow up should be the process the organisation follows.

Unit 208 Customer service in sales

UAN:	J/502/8224
Level:	Level 2
Credit value:	3
GLH:	25
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 85 Meet your customer's after sales service needs SLS 92 Build and retain effective sales relationships SLS 94 Build and deliver customer service and customer care support
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding how to build long term relationships with customers, approaches to managing customer accounts, the importance of customer loyalty, the brand and organisational reputation and how to meet the customers' after sales service needs

Learning outcome	The learner will:
1. understand how to build long term relationships with customers	
Assessment criteria	
The learner can: 1.1 describe customers' needs, wants and expectations 1.2 explain the importance of balancing customers' needs with organisational sales strategies and resource requirements 1.3 describe the basis on which relationships with customers are managed 1.4 explain the importance of negotiating **mutually beneficial** sales solutions 1.5 explain the role of **customer feedback** in enhancing relationships and profitability 1.6 describe the importance of **customers' experiences** in developing long term relationships.	

Range
Mutually beneficial
Customer and/or organisation
Customer feedback
Informal, formal
Customers' experiences
Positive, negative

Learning outcome	The learner will:
2. understand approaches to managing customer accounts	
Assessment criteria	
The learner can: 2.1 describe the role of key customer teams 2.2 explain how to develop **customer care programmes** 2.3 explain the role of IT in managing customer accounts 2.4 explain the importance of effective **communication channels** to support customer relationships.	

Range
Customer care programmes
Pre and post sale, existing and new customers
Communication channels
Internal, external

Learning outcome	The learner will:
3. understand the importance of customer loyalty	
Assessment criteria	
The learner can: 3.1 explain the relationship between customer loyalty and sales performance 3.2 describe the factors affecting the attraction and retention of customer loyalty 3.3 describe the advantages and disadvantages of **different methods** of enhancing customer loyalty 3.4 explain the importance of reviewing customers' experiences as a means of improving the service offer.	

Range
Different methods
Rewards service, problem solving ability, discounts, familiarity

Learning outcome	The learner will:
4. understand the importance of the brand and organisational reputation	

Assessment criteria
The learner can:
4.1 describe the way in which customers' **perceptions of organisations** and their products and/or services influence buying decisions
4.2 explain the link between customers' previous experiences and their future likely buying intentions
4.3 explain how the presentation of products and/or services affects the **perception of organizations.**

Range
Perceptions of organisations
Positive, negative

Learning outcome	The learner will:
5. understand how to meet the customers' after sales service needs	

Assessment criteria
The learner can:
5.1 explain how to ascertain customers' likely **after sales needs**
5.2 describe how to balance customers' needs with those of an organisation
5.3 explain the importance of fulfilling commitments made to customers in accordance with **organisational quality, customer service standards and legislative requirements**
5.4 explain the importance of keeping **sales records** up to date
5.5 explain the purpose of reviewing the quality and effectiveness of after sales service provision against **customer feedback**
5.6 describe how and when to negotiate alternatives, discounts and special offers in order to maintain the customer's loyalty.

Range
After sales needs
Information, advice, follow up service, replacement, maintenance
Organisational quality and customer service standards
Customer charter, service level agreement
Legislative requirements
Sales of Goods Act, Data Protection Act, FSA regulations, Equality Act
Sales records
Customer data, sales information, invoicing
Customer feedback
Informal, formal

Unit 208   Customer service in sales

Supporting information

Guidance

1.2: the sales strategy should be relevant to the candidate's area of responsibility.

1.3: this is in regard to customer distribution/allocation in the organisation.

2.1: the candidate must also show understanding of what is meant by 'key customer teams'.

2.3: the candidate must show understanding of what is meant by customer accounts and the role of IT in managing customer accounts in the organisation.

3.2: the candidate must describe at least **three** factors.

3.3: the candidate must cover the advantages and disadvantages of at least **two** different methods.

3.4: the candidate must also show they understand what is meant by the term service offer/customer charter.

4.1: the candidate must give at least **two** examples of each in relation to a customer's buying decisions.

4.3: this is a general presentation of either product or organisation.

Unit 209 Principles of personal responsibilities and working in a business environment

UAN:	L/601/7638
Level:	Level 2
Credit value:	4
GLH:	32
Relationship to NOS:	This unit is linked to Council for Administration Business and Administration NOS: BAA231; BAF172
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding employment rights; health, safety and security; how to work with others and how to manage and improve own work in a business environment.

Learning outcome	The learner will:
1. know the employment rights and responsibilities of the employee and employer	
Assessment criteria	

The learner can:

1.1 identify the main points of contracts of employment

1.2 identify the main points of legislation affecting employers and employees

1.3 identify where to find information on employment rights and responsibilities both internally and externally

1.4 describe how representative bodies can support the employee

1.5 identify employer and employee responsibilities for equality and diversity in a business environment

1.6 explain the benefits of making sure equality and diversity procedures are followed in a business environment.

Learning outcome	The learner will:
2. understand the purpose of health, safety and security procedures in a business environment	
Assessment criteria	

The learner can:

2.1 identify employer and employee responsibilities for health, safety

and security procedures in a business environment

| 2.2 | explain the purpose of following health, safety and security procedures in a business environment |
| 2.3 | identify ways of maintaining a safe and secure environment in a business environment. |

Learning outcome	The learner will:
3. understand how to communicate effectively with others	
Assessment criteria	
The learner can:	
3.1 describe different methods of communication	
3.2 explain how to choose the most appropriate method of communicating with others	
3.3 describe ways of actively listening.	

Learning outcome	The learner will:
4. understand how to work with and support colleagues	
Assessment criteria	
The learner can:	
4.1 explain the purpose of agreeing standards for own work with others	
4.2 explain the purpose of taking on new challenges and adapting to change	
4.3 explain the purpose of treating others with honesty and consideration.	

Learning outcome	The learner will:
5. know how to plan own work and be accountable to others	
Assessment criteria	
The learner can:	
5.1 explain the purpose of meeting work standards and deadlines when completing tasks	
5.2 identify ways of planning own work	
5.3 compare ways of keeping other people informed about progress.	

Learning outcome	The learner will:
6. understand the purpose of improving own performance in a business environment and how to do so	
Assessment criteria	
The learner can:	
6.1 explain the purpose of continuously improving own performance in a business environment	
6.2 describe ways of improving own performance in a business environment	
6.3 identify different types of career pathways that are available.	

Learning outcome	The learner will:
7. understand the types of problems that may occur in a business environment and how to deal with them	
Assessment criteria	
The learner can:	
7.1 identify the types of problems that may occur in a business environment	
7.2 explain ways of dealing with problems that may occur in a business environment	
7.3 explain how and when to refer problems to relevant colleagues.	

Unit 209   Principles of personal responsibilities and working in a business environment

Supporting information

Guidance

1.1. The main points to be included in a contract of employment are job title, place of work, the duties of the job, the pay, how payments will be made, hours of work, holiday entitlement, sick pay entitlement, any pension scheme arrangements, terms of notice.

1.2. Equal opportunities legislation, eg:
- The Sex Discrimination Act 1975 and 1986
- The Race Relations Act 1976
- The Equal Pay Act 1970
- The Disability Discrimination Act 1995 (DDA)

Note that the above will gradually be absorbed into the Equality Act 2010.

Employment legislation, eg:
- Employment Rights Act 1996
- Employment Relations Act 1999
- Working Time Regulations 1998
- Employment Act 2002/2004

Health and safety legislation, eg:
- Health and Safety at Work Act
- Reporting of Injuries, Disease and Dangerous Occurrences Regulations (RIDDOR) 1992
- The Management of Health and Safety in a business environment Regulations
- Workplace (Health, Safety and Welfare) Regulations 1992
- Display Screen Equipment Regulations 1992
- The Provision and Use of Work Equipment Regulations 1998
- Control of Substances Hazardous to Health (COSHH) 1999

Data and intellectual property protection:
- The Data Protection Act 1984/1998
- The Copyright, Designs and Patents Act 1988

Company legislation, eg:
- Companies Act 1985

1.3. Sources of information:

- Internal eg line manager, HR/personnel department, union representative, intranet.
- External eg Health and Safety Executive (HSE), Department of Trade and Industry (DTI), ACAS, TUC, trade unions, Citizens' Advice Bureaux, internet, library, government agencies.

1.4. Representative bodies such as
- trade unions
- professional associations
- health and safety officers.

Support in terms of
- advice
- information
- legal assistance
- financial help.

1.5. Employer and employee responsibilities for equality and diversity:
- complying with discrimination legislation
- equal opportunities/diversity policies
- Equality and Human Rights Commission´s guidelines.

1.6. Elements that create 'diversity' are gender, age, background, culture, ethnicity, disability, religion, sexual orientation, personality and work style. Benefits could include:
- workforce reflects the public community it is dealing with
- employees feel valued and respected and perform better
- recognition of the needs and preferences of a wider sector of the public
- wider pool of skilled talent to choose from
- lower staff costs/turnover.

2.1. Employer and employee responsibilities:
- complying with health and safety legislation (as in learning outcome 1)
- risk assessment
- role and duties of a first-aider or appointed person
- environmental issues such as heating, lighting, ergonomics, ventilation, décor
- emergency and evacuation procedures
- security and confidentiality of data
- health and safety training.

2.2. Purpose of procedures covering:
- the use of safe working methods and equipment
- the safe use of hazardous substances
- what to do in the event of an emergency
- accident reporting/first aid

- security regarding data, stock and personnel
- reporting of hazards/risk assessment.

2.3. Maintaining a safe and secure environment:
- following the requirements of the health and safety in a business environment act 1974
- following specific legislation covering job roles
- identifying hazards and risks; risks resulting from:
  a) the use and maintenance of machinery or equipment
  b) the use of materials or substances
  c) working practices
  d) unsafe behaviour
  e) accidental breakages and spillages
  f) environmental factors.
- the responsible persons to whom to report health and safety matters
- responsibilities and specific workplace policies covering job roles.

3.1. Both formally and informally, internal and external:
- written eg letters, memos, reports
- face-to-face eg one-to-one, meetings, presentations
- electronically eg fax, email, telephone
- non-verbally eg body language, gestures.

3.2. Method of communication In terms of:
- formality
- speed
- confidentiality
- cost.

3.3. Active listening eg:
- making eye contact
- using positive body language
- using encouraging phrases
- not interrupting
- questioning and paraphrasing
- summarising.

4.1. Agreeing standards in terms of, eg:
- deadlines
- quality of work
- type/scope of work
- available resources/support.

The candidate should be able to explain the importance of gaining full information in order to complete work efficiently, accurately and to deadline.

4.2. Benefits that result from taking on new challenges and being adaptable, eg:

- possible financial reward/promotion
- opportunity to gain new skills
- motivational
- new experiences build confidence
- may increase employability.

4.3. How to create and maintain a good working relationship with others eg:

- communicate
- support
- co-operate
- empathise
- be loyal.

The purpose of good working relationships in terms of eg:

- meeting deadlines and targets
- motivation
- sharing workloads
- support and advice.

5.1. The importance of having a flexible approach to work requirements and knowing how to prioritise and plan pieces of work according to their urgency eg using SMART objectives.
The candidate should be able to describe circumstances when deadlines cannot be met through, eg:

- interruptions
- distractions
- taking on extra work
- staff absence
- technical breakdown
- unforeseen circumstances such as inclement weather, transport strikes.

The candidate should be aware of the impact of not meeting deadlines on:

- their colleagues
- their manager/supervisor
- the organisation as a whole.

5.2. Techniques to prioritise and plan own workload, eg:

- diaries
- schedulers
- planners
- organisers/PDAs
- timesheets
- to do lists.

5.3. Ways of progress reporting may be through, eg:
- regular progress reports
- one-to-one update meetings
- progress/team meetings
- shared project planners.

The candidate should be able to state advantages/disadvantages of different ways and when they would be most appropriate to use.

6.1. Benefits that result from continuously improving own performance, eg
- opportunity to improve weaknesses and gain new skills
- motivational
- increased ability to embrace changes/challenges
- possible financial reward/promotion
- increased employability.

6.2. Methods of assessing own performance, eg SWOT analysis; how observation and feedback, training needs analyses (TNA), one-to-one meetings/ appraisal and performance reviews can all feed into a Personal Development Plan. The candidate should be able to explain the purpose of using SMART techniques when creating such a plan.
The candidate should be able to identify a range of training and development opportunities to assist in improving own performance:
- coaching
- mentoring
- work-shadowing
- training courses
- in-house training
- performance appraisals
- e-learning.

6.3. Career paths/progression routes available both inside and outside the organisation and the possible sources of information on these.

7.1. Problems may be
- minor, ie that can be solved by making adjustments and with little or no assistance;
- major, ie those that have resource or financial implications.

Types of problems eg:
- financial
- resource related
- equipment/systems failure
- staff-related
- unforeseen (weather, industrial action).

7.2. Possible methods could be, eg:
- replanning/reprioritising own work

- gaining the support of others
- identifying a solution and seeking permission to implement it
- referring the problem on.

7.3. Problem should be referred if, eg
- the solution will cost money or affect many others
- it will impact seriously on the overall target/deadline
- there is no apparent solution
- there is a security, health or safety risk
- the solution is outside the candidate's scope of authority.

The candidate should be able to identify the limits of their own authority in finding solutions to problems and identify procedures for referring problems and to whom they should be referred.

Unit 303	Understanding the relationship between sales and marketing

UAN:	**F/502/8223**
Level:	Level 3
Credit value:	3
GLH:	21
Relationship to NOS:	This unit is linked to Council for Administration NOS.
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding the impact of different organisational structures on sales and marketing functions, the interface between sales and marketing functions and product development processes

Learning outcome	The learner will:
1. understand the impact of different organisational structures on sales and marketing functions	
Assessment criteria	
The learner can: 1.1 describe the features of different **organisational structures** 1.2 explain the effect of different organisational structures on sales and marketing functions and their performance.	

Range
Organisational structures Small, medium and large

Learning outcome	The learner will:
2. understand the interface between sales and marketing functions	
Assessment criteria	
The learner can: 2.1 explain the role and responsibilities of sales personnel 2.2 explain the role and responsibilities of marketing personnel 2.3 describe areas of synergy between the sales and marketing functions 2.4 describe the benefits of collaborative working to the performance of an organisation	

| 2.5 | explain potential causes of friction between the sales and marketing functions |
| 2.6 | describe mutually acceptable solutions to identified sources of friction. |

Learning outcome	The learner will:
3.	understand the impact of sales and marketing on product development processes
Assessment criteria	
The learner can:	
3.1	describe the product development process
3.2	explain the role of sales and marketing in the **product development process**
3.3	explain the market features and trends relating to a product or service
3.4	describe the characteristics and benefits of a product or service
3.5	explain the wants and needs of an organisation's customer base
3.6	describe how to prepare a **business case** for a product or service
3.7	describe how to forecast sales of a product or service
3.8	explain the importance and use of **customer feedback** in relation to product development.

Range
Product development process
Customer feedback; research; development; trial; marketing
Business case
Formal, informal
Customer feedback
Formal, informal

Unit 303 Understanding the relationship between sales and marketing

Supporting information

Guidance

1.1: the features of each structure must be described.

1.2: the effect of different structures on sales and marketing must be explained.

2.1: the candidate must identify at least **four** roles within sales and the responsibilities.

2.2: the candidate must identify at least **four** roles within marketing and the responsibilities.

2.3: synergy is where there is co-operation from others to achieve an objective which could not be achieved independently.

2.4: collaborative working is working together on a project/activity.

Unit 304   Principles of online selling

UAN:	Y/502/8227
Level:	Level 3
Credit value:	3
GLH:	24
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 57 Communicate using multiple digital marketing and sales channels
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding how to plan online selling, implementation issues and evaluation processes for online selling

Learning outcome	The learner will:
1. understand how to plan online selling	

Assessment criteria
The learner can:
1.1   describe the **characteristics** of online selling
1.2   describe how online selling fits into an overall sales and marketing strategy
1.3   explain the requirements of multiple **media** to be used
1.4   explain the strengths and limitations of different types of software used for online selling
1.5   describe the use of click-through tracking and cookies as a means of contributing to enhanced sales performance
1.6   explain how to deal with "**undeliverables**" and other systems failures.

Range
Characteristics
Clear product or service display information, clear pricing, stock updates, customer service facility, payment and invoicing facilities, security and encryption, shipping facilities, search function, reviews and recommendations
Media
Website, internet, social networking, mobile phones, promotional video or imagery

Undeliverables
Bounce back, non delivery notification, delivery status notification

Learning outcome	**The learner will:**
2. understand implementation issues in online selling	
Assessment criteria	
The learner can: 2.1 explain the **criteria** for acquiring **targets lists** and databases 2.2 explain the way in which **media** are selected to optimise sales 2.3 describe the way in which sales/marketing messages are developed to engage customers 2.4 describe the **media** through which sales/marketing messages are communicated to reach potential customers.	

Range
Criteria Buying mailing lists (worth of each customer), promotional opportunities, marketing, legislative requirements **Target lists** Individuals, organisations **Media** Internet, mobile phone, social networking, TV, radio, newspapers

Learning outcome	**The learner will:**
3. understand evaluation processes for online selling	
Assessment criteria	
The learner can: 3.1 explain how the success of online selling is measured 3.2 explain the importance of cleansing data and the consequences of not doing so 3.3 explain the value of **customer feedback** from online selling in improving future activities.	

Range
Customer feedback Formal, informal

Unit 304 Principles of online selling

Supporting information

Guidance

1.1: online selling could include E-shop, webstore, online trader, internet shop, auction site.

1.4: the candidate must carry out research and identify at least **three** types of software which could include Paypal, CRM, Automated sales systems, shopping cart systems.

1.5: click through tracking can be used for recording web browsing history. Cookies can be used for authentication, storing site preferences.

Unit 305 Understanding customers' creditworthiness for sales purposes

UAN:	H/502/8232
Level:	Level 3
Credit value:	2
GLH:	16
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 33 Assess customer creditworthiness SLS 82 Assist customers to obtain finance for purchases
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding the process of assessing customers' credit status and how customers' ongoing credit status is monitored

Learning outcome	The learner will:
1. understand the process of assessing customers' creditworthiness	
Assessment criteria	

The learner can:
1.1 explain the **legal and regulatory requirements** relevant to obtaining finance for customers
1.2 explain the basis for calculating customers' borrowing needs
1.3 explain the features and requirements of different sources of finance (eg hire purchase, bank loans, leasing)
1.4 describe the information needed to be able to carry out credit searches
1.5 explain the process for setting **credit limits** on customers
1.6 describe the requirements of financial checks through banks, credit rating agencies and supplier references
1.7 explain the actions to be taken if credit searches' findings are negative
1.8 explain where to refer customers for financial assessment and/or advice.

Range
Legal and regulatory requirements
FSA regulations, Data Protection Act, Equality Act, organisational procedures.
Credit limits
Fixed, flexible

Learning outcome	The learner will:
2. understand how customers' ongoing credit status is monitored	
Assessment criteria	
The learner can: 2.1 explain the importance of formal agreements with customers 2.2 describe the different criteria customers' accounts are monitored against 2.3 explain the actions to be taken with regard to changes in credit limits, spending patterns and the status of customer accounts.	

Unit 305 Understanding customers' creditworthiness for sales purposes

Supporting information

Guidance

1.3: the candidate must cover the features and requirements of **three** sources of finance.

1.4: the candidate must describe at least **four** types of information.

2.3: spending patterns and customer accounts should cover both individual and organisational.

Unit 306   Competitor analysis in the sales environment

UAN:	**M/502/8234**
Level:	Level 3
Credit value:	2
GLH:	20
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 12 Analyse competitor information
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding the use of sales-related information, collection and storage requirements, the use of tools and methods for analysing quantitative and qualitative sales-related information and how the results of competitor analysis is used

Learning outcome	The learner will:
1. understand the use of sales-related information	
Assessment criteria	
The learner can: 1.1 describe how **sales-related information** is used to enhance sales performance (markets, volume, mix and value) 1.2 explain the benefits and risks of using different **sources** of **sales-related information**.	

Range
Sales related information
Customer data, competitor information, sales history
Sources
Internal, external

Learning outcome	The learner will:
2. understand the collection and storage requirements of sales-related information	
Assessment criteria	

The learner can:

2.1 describe the advantages and disadvantages of different systems to gather **sales-related information**

2.2 explain the importance of safe, secure and accessible data storage

2.3 explain the importance of ensuring the currency and accuracy of **sales-related information**

2.4 explain how to **validate** the sales-related information collected.

Range

Sales related information
Customer data, competitor information, sales history

Validate
Currency, authenticity

Learning outcome	The learner will:
3. understand the use of tools and methods for analysing quantitative and qualitative sales-related information	
Assessment criteria	

The learner can:

3.1 explain the use, strengths and limitations of different analytical software packages

3.2 explain the differences between **primary and secondary data**

3.3 describe the criteria against which competitor information is analysed and evaluated

3.4 explain how to identify trends in sales- and competitor-related information

3.5 describe the formats for presenting the analysis of sales-related information.

Range

Primary data
Surveys, interviews, focus groups, questionnaires, internal

Secondary data
Trade journals, books, newspapers, internet, customers

Learning outcome	The learner will:
4. understand how the results of competitor analysis are used	
Assessment criteria	

The learner can:

4.1 explain the findings of competitor analysis on sales potential and performance

4.2   describe the impact of competitor activity on sales activities and plans
4.3   explain the use of competitor information in the formulation of **sales proposals**
4.4   explain who needs to know about competitor activity and why.

Range
Sales proposals
New and existing customers and/or development of product/service.

Unit 306   Competitor analysis in the sales environment

Supporting information

Guidance

2.1: the candidate must describe at least **two** different systems and the advantages and disadvantages of each.

3.1: the candidate must explain strengths, limitations and use of at least **two** analytical software packages.

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.

This qualification has connections to the:
- old Level 2 in Sales (6849)
- new Level 2 & 3 NVQ in Sales (6801)
- new 7712 & 7734 in Marketing
- new 4430 & 4417 in Customer Service
- new 3411 & 3412 in Contact Centres

Literacy, language, numeracy and ICT skills development

This qualification can develop skills that can be used in the following qualifications:
- Functional Skills (England) – see **www.cityandguilds.com/functionalskills**
- Essential Skills (Northern Ireland) – see **www.cityandguilds.com/essentialskillsni**
- •Essential Skills Wales – see **www.cityandguilds.com/esw**

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**.

Centre Manual - Supporting Customer Excellence 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, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Our Quality Assurance Requirements encompasses all of the relevant requirements of key regulatory documents such as:

- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

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

City & Guilds
Skills for a brighter future

www.cityandguilds.com

Useful contacts

UK learners **General qualification information**	**T: +44 (0)844 543 0033** **E: learnersupport@cityandguilds.com**
International learners General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: **intcg@cityandguilds.com**
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **centresupport@cityandguilds.com**
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: **singlesubjects@cityandguilds.com**
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **intops@cityandguilds.com**
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **walledgarden@cityandguilds.com**
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: **business@cityandguilds.com**
Publications Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413