

Level 3 Certificate in Principles of Sales (7711-03)

October 2017
Version 1.4



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 3 Certificate in Principles of Sales	119	160	7711-03	600/0667/5

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	Qualification at a glance and Introduction Throughout



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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 Advanced 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: <ul style="list-style-type: none">• Level 2/3 NVQ Certificate/Diploma in Marketing (7712-02/03/04)• Level 2/3 NVQ Certificate/Diploma in Sales (6801-01/02/03/04)• 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 3 Certificate in Principles of Sales (7711-03)**, learners must achieve **12** credits from the mandatory units and a minimum of **4** credits from the optional units available. A minimum of **2** credits at Level 3 must be taken from the optional units. 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				
F/502/8206	203	Understanding legal, regulatory and ethical requirements in sales or marketing	2	
J/502/8207	301	Understanding the sales environment	2	
J/502/8210	302	Understanding sales techniques and processes	4	
D/601/7644	307	Principles of personal responsibilities and how to develop and evaluate own performance at work	4	
Optional				
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 3 Certificate in Principles of Sales	119	160



2 Centre requirements

Approval

If your Centre is approved to offer the qualification Level 3 Certificate in Sales (6819-03) you will have automatic approval for the new Level 3 Certificate in Principles of Sales (7711-03).

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.

Any units which have been taken in the Level 2 Certificate in Principles of Sales (7711-02) can be crossed over to the Level 3 Certificate in Principles of Sales (7711-03) and will not have to be taken again.

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 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

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 10: Unit 301**Duration:** 1 hour

Unit	Outcome	Number of questions	Weighting %
301	1 Understand customer groups in the sales environment	5	34
	2 Understand sales communication techniques	6	40
	3 Understand time management in the sales environment	4	26
Total		15	100

Test 11: Unit 302**Duration:** 1 hour 30 mins

Unit	Outcome	Number of questions	Weighting %
302	1 Understand buyer behaviour in sales situations	8	27
	2 Understand pricing for sales promotions	9	30
	3 Understand the implementation sales plans	5	16
	4 Understand negotiation techniques in sales situations	8	27
Total		30	100

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

Test 16 Unit 307**Duration:** 1 hour 15 mins

Unit	Outcome	Number of questions	Weighting %
307	1 Understand the employment rights and responsibilities of the employee and employer and their purpose	8	32
	2 Understand the purpose of health, safety and security procedures in a business environment	3	12
	3 Understand how manage own work	5	20
	4 Understand how to evaluate and improve own performance in a business environment	4	16
	5 Understand the types of problems that may occur with own work and how to deal with them	3	12
	6 Understand the decision making process	2	8
Total		25	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.

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)
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
301	Understanding the sales environment	2	J/502/8207
302	Understanding sales techniques and processes	4	J/502/8210

Unit number	Unit title	Credits	Unit number (UAN)
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
307	Principles of personal responsibilities and how to develop and evaluate own performance at work	4	D/601/7644

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 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	

<p>Procedures, actions, processes</p> <p>Legal requirements Health and Safety at Work Act, Working Time Directive and employment legislation, Copyright Laws, Equality Act, Data Protection Act</p> <p>Regulatory requirements FSA regulations</p> <p>Ethical requirements Moral, political, material</p> <p>Internal sources Intranet, HR Dept, Company handbook</p> <p>External sources Government bodies, trade associations, Health & Safety Executive, Office for Disability Issues</p>

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

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.

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

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.

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.

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.

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

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
<p>Customer care programmes Pre and post sale, existing and new customers</p> <p>Communication channels Internal, external</p>

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
<p>Different methods Rewards service, problem solving ability, discounts, familiarity</p>

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 301

Understanding the sales environment

UAN:	J/502/8207
Level:	Level 3
Credit value:	2
GLH:	15
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 54 Manage and prioritise time for sales activities
Assessment requirements specified by a sector or regulatory body	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills.
Aim:	This unit concerns understanding customer groups, sales communication techniques and time management in the sales environment

Learning outcome	The learner will:
1.	understand customer groups in the sales environment
Assessment criteria	
The learner can:	
1.1	describe the motivations and behaviours of different customer groups
1.2	explain the use of a customer segmentation strategy
1.3	describe how to develop profiles for customer groups
1.4	explain how to use information about customer groups to enhance sales performance.

Range
<p>Customer groups Individuals grouped by age, gender, interests, price, lifestyle; business</p> <p>Customer segmentation Focusing on age, gender, interests</p>

Learning outcome	The learner will:
2.	understand sales communication techniques
Assessment criteria	
The learner can:	
2.1	explain the characteristics of effective communication in a sales environment
2.2	describe how to adapt communication techniques to meet the information needs of the target audience (colleagues and customers)
2.3	explain the importance of confirming the audience's understanding of what has been communicated
2.4	explain how to recognise ' buying signals '

Range
<p>Characteristics Presentation, integrity, equality and diversity, language</p> <p>Communication Verbal, non verbal</p> <p>Customers Internal, external</p> <p>Buying signals Positive, negative</p>

Learning outcome	The learner will:
3.	understand time management in the sales environment
Assessment criteria	
The learner can:	
3.1	explain the impact of effective time management on sales performance, profitability and the achievement of business objectives
3.2	explain how to resolve conflicting priorities to ensure optimum efficiency
3.3	explain the use of delegation in managing time and achieving efficiency objectives.

Unit 301 Understanding the sales environment

Supporting information

Guidance

1.3: profiles - outline of the type of customer likely to purchase the product and/or service.

3.1: the candidate must cover the impact of time management on each of sales performance, profitability and the achievement of business objectives.

3.2: the candidate must explain at least **two** ways in which they would resolve conflicting priorities.

UAN:	J/502/8210
Level:	Level 3
Credit value:	4
GLH:	30
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS 28 Develop, implement and monitor sales call plans SLS 29 Contribute to the development of new products and services SLS 34 Pricing to promote products and services SLS 75 Manage and facilitate case negotiations
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 buyer behaviour in sales situations, pricing for sales promotions, the implementation of sales call plans and negotiation techniques in sales situations

Learning outcome	The learner will:
1. understand buyer behaviour in sales situations	
Assessment criteria	
The learner can:	
1.1	explain the different roles within buyer decision-making processes
1.2	describe the influences on buyer decision-making processes
1.3	describe the impact of the buyer decision-making processes on sales techniques
1.4	explain different methods of contacting customers, influencers and decision-makers at different stages of the buyer decision-making process
1.5	explain the basis on which solutions are designed to meet the needs of buyers
1.6	explain the concept and use of the value chain.

Range
<p>Buyer decision-making processes Economic model, psychological model, consumer behaviour model</p> <p>Influences PESTL analysis</p>

Learning outcome	The learner will:
2.	understand pricing for sales promotions
Assessment criteria	
The learner can:	
2.1	describe the characteristics and uses of different types of price-based promotions (including incentives and discounts)
2.2	describe competitors' strategies to respond to price changes and price-based promotions
2.3	describe how to develop a proposal for price-based promotions
2.4	explain the basis for calculating affordability and profitability of price-based promotions
2.5	explain the design and use of methods of measuring and evaluating the success of price-based promotions
2.6	explain how to use sales opportunities resulting from price-based promotions for higher volume and value sales.

Learning outcome	The learner will:
3.	understand the implementation of sales plans
Assessment criteria	
The learner can:	
3.1	explain the importance of preparing for sales activities (face to face and telephone)
3.2	describe how to identify the customer's/prospect's current situation, wants and needs
3.3	explain how to identify the nature of competitor behaviour that may affect the outcome of the sales activity
3.4	explain how the benefits of the product and/or service meet the customer's wants and needs
3.5	describe how to identify follow-up actions designed to address the strength of the prospect and the level of their interest.

Range
<p>Customer/prospect Individual, organisation</p>

Learning outcome	The learner will:
4.	understand negotiation techniques in sales situations
Assessment criteria	
The learner can:	
4.1	explain the importance of preparing for negotiations
4.2	describe how to identify issues that prevent customers from agreeing to the sale
4.3	describe how to handle objections
4.4	explain the use of testimonials and evidence of the product's and/or service's strengths in making a sale
4.5	explain the use of the negotiating plan when making a sale
4.6	describe the impact of the limits of authority in negotiating agreements and deals.

Range
<p>Issues Price, competitor products/services, needs, discussion with others</p> <p>Objections Price, value of the product, angry/aggressive customer, unresponsive customer</p> <p>Testimonials Purchaser, user</p>

Unit 302 Understanding sales techniques and processes

Supporting information

Guidance

- 1.1: the candidate must explain the different roles in at least **two** buyer decision-making processes.
- 1.4: the candidate must explain at least **four** different methods.
- 1.6: the candidate must show understanding of what a value chain is, how it is made up, who is part of it and then how it is used.
- 2.1: the candidate must describe at least **two** characteristics and **two** uses.
- 2.2: the candidate must describe at least **two** responses to specific price changes and price based promotions.
- 2.5: the candidate must explain at least **two** methods and cover both their design and use.

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

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
<p>Characteristics</p> <p>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</p> <p>Media</p>

Website, internet, social networking, mobile phones, promotional video or imagery

Undeliverables

Bounce back, non delivery notification, delivery status notification

Learning outcome	The learner will:
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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:
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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
<p>Legal and regulatory requirements FSA regulations, Data Protection Act, Equality Act, organisational procedures.</p> <p>Credit limits Fixed, flexible</p>

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.

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
<p>Sales related information Customer data, competitor information, sales history</p> <p>Validate Currency, authenticity</p>

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
<p>Primary data Surveys, interviews, focus groups, questionnaires, internal</p> <p>Secondary data Trade journals, books, newspapers, internet, customers</p>

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.

Unit 307

Principles of personal responsibilities and how to develop and evaluate own performance at work

UAN:	D/601/7644
Level:	Level 3
Credit value:	4
GLH:	32
Relationship to NOS:	This unit is linked to Council for Administration Business and Administration NOS: BAA626; BAC312; 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 ones own responsibilities for action in a business environment, including legislative and contractual responsibilities and ways of managing and evaluating own work effectively.

Learning outcome	The learner will:
1.	understand the employment rights and responsibilities of the employee and employer and their purpose
Assessment criteria	
The learner can:	
1.1	identify the main points of contracts of employment and their purpose
1.2	outline the main points of legislation affecting employers and employees and their purpose, including anti-discrimination and entitlement legislation
1.3	identify where to find information on employment rights and responsibilities both internally and externally
1.4	explain the purpose and functions of representative bodies that support employees
1.5	explain 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	explain employer and employee responsibilities for health, safety and security in a business environment
2.2	explain the purpose of following health, safety and security procedures in a business environment.

Learning outcome	The learner will:
3.	understand how to manage own work
Assessment criteria	
The learner can:	
3.1	explain the reasons for planning and prioritising own work
3.2	identify ways of planning and prioritising own work
3.3	explain the purpose of keeping other people informed about progress
3.4	describe methods of dealing with pressure in a business environment.

Learning outcome	The learner will:
4.	understand how to evaluate and improve own performance in a business environment
Assessment criteria	
The learner can:	
4.1	explain the purpose of continuously evaluating and improving own performance in a business environment
4.2	describe ways of evaluating and improving own performance in a business environment
4.3	explain the purpose of encouraging and accepting feedback from others
4.4	explain different types of career pathways and roles available.

Learning outcome	The learner will:
5.	understand the types of problems that may occur with own work and how to deal with them
Assessment criteria	
The learner can:	
5.1	describe the types of problems that may occur with own work
5.2	explain ways of dealing with problems that may occur with own work
5.3	explain how and when to refer problems to relevant colleagues.

Learning outcome	The learner will:
6.	understand the decision making process
Assessment criteria	
The learner can:	
6.1	explain key stages in the decision-making process
6.2	explain the purpose of not exceeding own limits of authority in making decisions.

Unit 307 Principles of personal responsibilities and how to develop and evaluate own performance at work

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 at Work Regulations 1999
- 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. Information on employment rights and responsibilities:

- 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.

The candidate will need to explain the purpose and function in terms of

- advice
- information
- legal assistance
- financial help.

1.5. The candidate will need to explain how employers and employees ensure equality and diversity in practice by:

- complying with discrimination legislation
- creating equal opportunities/diversity policies
- using Equal Opportunities Commission's guidelines.

1.6. Elements that create 'diversity' are gender, age, background, culture, ethnicity, disability, religion, sexual orientation, personality and work style. Candidates will need to explain how these differences can be of benefit to an organisation, eg:

- 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. Responsibilities of both employer and employee in

- complying with health and safety legislation (as in learning outcome 1)
- risk assessment
- appointing and knowing the role and duties of a first-aider or appointed person
- maintaining environmental issues such as heating, lighting, ergonomics, ventilation, décor
- having and complying with emergency and evacuation procedures
- maintaining the security and confidentiality of data stock and personnel

- 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.

3.1. The candidate will need to explain how to organise their own work and why this is important in terms of

- meeting deadlines
- achieving objectives
- being accountable to others.

They should be able to describe circumstances when deadlines cannot be met through, eg:

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

They should be aware of the impact of not meeting deadlines on:

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

3.2. Different planning tools and techniques such as use of SMART techniques, to prioritise and plan own workload as well as the use of, eg:

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

3.3. The candidate needs to explain why it is important to keep others informed about progress, in terms of eg

- meeting deadlines/targets
- accessing support when required
- to anticipate and plan for problems/delays

- the effect on colleagues' work loads/patterns.

Ways of progress reporting may be through, eg:

- regular progress reports
- one-to-one update meetings
- progress/team meetings
- shared project planners.

3.4. The candidate will need to describe the

- relationship between pressure and stress
- symptoms of not coping
- necessary action to take to reduce pressure and therefore avoid stress developing
- factors at work and at home that lead to stress.

4.1. Benefits that result from continuously improving own performance in terms of, eg

- improving weak areas and gaining new skills
- motivation
- increased ability to embrace changes/challenges
- possible financial reward/promotion
- increased employability.

4.2. Methods of assessing own performance, eg SWOT analysis and training needs analysis (TNA), as well as observation and feedback, one-to-one meetings/appraisal and performance reviews, and how to create a Personal Development Plan using SMART techniques. Range of training and development opportunities:

- coaching
- mentoring
- work-shadowing
- training courses
- in-house training
- performance appraisals
- e-learning.

4.3. The candidate needs to explain how feedback, both formal and informal, can result in personal growth and development, eg from

- managers/supervisors
- colleagues – 360°
- customers.

4.4. The candidate should explain career paths/progression routes available both inside and outside the organisation and the possible sources of information on these.

5.1. Problems may be both

- 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).

5.2. Possible methods eg:

- replanning/reprioritising own work
- gaining the support of others
- identifying a solution and implementing it.

5.3. The candidate should be able to explain how to assess a problem for seriousness in terms of impact on

- finance
- meeting target/deadline
- colleagues
- external customers/organisation's reputation • security, health or safety.

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

6.1. The candidate should be able to explain key stages in the decision-making process, eg:

- analysis
- consultation
- negotiation
- feedback.

and show an awareness of who in an/their organisation has responsibility for different types of decisions, eg:

- strategic
- operational
- related to individual roles and responsibilities.

They will also need to describe the factors that may affect decisions, eg

- sector regulations and codes of practice
- organisation size and structure
- organisational culture.

6.2. The candidate needs to explain their span of control and the impact of decisions on their role set colleagues. They should be able to identify decisions that are within and outside their limit of authority.



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 3 Certificate in Sales (6819-03)
- new Level 3 Certificate/Diploma in Sales (6801-03/04)
- 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 (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.

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 GOLLA assessments.

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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, GOLA, 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

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About City & Guilds

As the UK's leading vocational education organisation, City & Guilds is leading the talent revolution by inspiring people to unlock their potential and develop their skills. We offer over 500 qualifications across 28 industries through 8500 centres worldwide and award around two million certificates every year. City & Guilds is recognised and respected by employers across the world as a sign of quality and exceptional training.

City & Guilds Group

The City & Guilds Group operates from three major hubs: London (servicing Europe, the Caribbean and Americas), Johannesburg (servicing Africa), and Singapore (servicing Asia, Australia and New Zealand). The Group also includes the Institute of Leadership & Management (management and leadership qualifications), City & Guilds Land Based Services (land-based qualifications), the Centre for Skills Development (CSD works to improve the policy and practice of vocational education and training worldwide) and Learning Assistant (an online e-portfolio).

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