



SPECIFICATION

Level 3 NVQ Diploma In Sales (QCF)

Qualification summary

QCF level 3

Qualification credit value 37 credits

Minimum credits at/above level 22 credits

Assessment requirements Portfolio of Evidence

Aims and objectives of the qualification The Level 3 NVQ Diploma in Sales (QCF) is designed for people who work in a sales environment, either in sales roles or performing sales functions, and who have direct contact with customers. This qualification is aimed at those who carry out selling activities, such as telesales, on-line and face-to-face selling, covering all industries including the private, public and voluntary sectors.

Entry guidance There are no formal entry requirements for this qualification. This qualification is suitable for those who work in sales positions across a variety of sales related industries including competitor analysis, online sales, field or internal senior sales.

Progression opportunities Learners who achieve this qualification could progress into or within employment in a number of areas, and/or continue their study in the same work in a variety of sales industries. Sales skills are required in a wide range of roles including;

- Sales representative
- Sales manager
- Membership sales
- Customer service assistant/manager
- Retail assistant/manager
- Travel agent

On completion of this qualification, Learners may progress to:

Level 3 Certificate in Principles of Business and Administration (QCF)

Level 3 NVQ Diploma in Business and Administration (QCF)

Level 3 NVQ Diploma in Leisure Management (QCF)

Qualification Structure

To achieve the Level 3 NVQ Diploma in Sales, the learner must achieve a total of 37 credits. 6 credits from mandatory Group A and a further 31 credits from optional Groups B and C, of which a maximum of 13 credits can be completed from Group C. A minimum of 22 credits must be achieved at level 3.

Unit Structures

All units are listed below.

Mandatory units Group A

Unit ref	Unit title	Level	Credit value	GLH
F/502/8612	Negotiating, handling objections and closing sales	Level 3	4	22
A/502/8561	Complying with legal, regulatory and ethical requirements in a sales or marketing role	Level 2	2	13

Optional Unit Group B

Unit ref	Unit title	Level	Credit value	GLH
J/502/8594	Selling at exhibitions	Level 2	5	28
R/502/8601	Meeting customers' after sales needs	Level 2	3	14
F/502/8559	Time planning in sales	Level 2	2	13
R/502/8615	Obtaining and analysing sales-related information	Level 3	4	24
H/502/8618	Obtaining and Analysing Competitor Information	Level 3	3	18
K/502/8622	Buyer behaviour in sales situations	Level 3	3	27
L/502/8628	Pricing for sales promotions	Level 3	5	34
L/502/8631	Preparing and delivering a sales presentation	Level 3	4	28
D/502/8634	Developing and implementing sales call plans	Level 3	3	22
K/502/8636	Assisting customers in obtaining finance for purchases	Level 3	2	11
T/502/8638	Assessing customers' credit status	Level 3	4	26
T/502/8624	Communicating using digital marketing/sales channels	Level 3	4	26
A/502/8639	Contributing to the development and launch of new products and/or services	Level 3	4	26
D/502/8651	Prioritising information for sales planning	Level 4	3	20
M/502/8654	Monitoring and managing sales team performance	Level 4	5	32
A/502/8656	Developing sales proposals	Level 4	5	30
F/502/8657	Building and retaining sales relationships	Level 4	5	34
L/502/8659	Developing and implementing sales support and customer service programmes	Level 4	5	35
H/600/9724	Communicate information and knowledge	Level 2	3	10

L/600/9586	Manage own professional development within an organisation	Level 3	4	20
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Optional Unit Group C

Unit ref	Unit title	Level	Credit value	GLH
R/600/9587	Develop, maintain and review personal networks	Level 4	4	25
Y/600/9686	Lead and manage meetings	Level 3	4	20
Y/601/1230	Organise the delivery of reliable customer service	Level 3	6	40
M/600/9676	Support learning and development within own area of responsibility	Level 4	5	25
T/502/8641	Leading a sales or marketing team	Level 3	4	25
F/502/8643	Managing the induction and probation of sales staff	Level 3	3	15
L/502/8662	Recruiting sales team members	Level 4	4	23

Title:	F/502/8612 Negotiating, handling objections and closing sales
Level:	3
Credit Value:	4
GLH	22
Learning Outcomes The learner will:	Assessment Criteria The learner can;
1. Understand how to handle objections and negotiate with the customer	<p>1.1 Describe the scope of authority and responsibility when dealing with objections</p> <p>1.2 Identify the resources available to counter the sales objections</p> <p>1.3 Describe how to plan and prepare for negotiation</p> <p>1.4 Describe how to use testimonials to progress a sale</p> <p>1.5 Explain the advantages and disadvantages of different methods of closing a sale</p> <p>1.6 Explain organisational procedures for documenting the negotiated sale</p>
2. Be able to prepare for objections and negotiation with the customer	<p>2.1 Identify possible sales objections and appropriate responses prior to dealing with the customer</p> <p>2.2 Confirm authorisation to negotiate</p> <p>2.3 Prepare a negotiation plan that is capable of providing a mutually acceptable outcome</p>
3. Be able to handle objections	<p>3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques</p> <p>3.2 Identify and prioritise customers' concerns</p> <p>3.3 Provide evidence to the customer of the strengths of the organisation's products or services</p>

	<p>3.4 Confirm with the customer that the objection(s) have been overcome</p> <p>3.5 Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals</p>
4. Be able to negotiate with the customer	<p>4.1 Carry out negotiations according to negotiation plan</p> <p>4.2 Promote the benefits of what is being offered to the customer</p> <p>4.3 Explain to the customer when and why no further adjustment is possible</p> <p>4.4 Obtain support to progress negotiation that is outside own level of authority</p>
5. Be able to close the sale following negotiation	<p>5.1 Apply a trial close in accordance with the negotiation plan</p> <p>5.2 Respond to any further objections and concerns</p> <p>5.3 Identify and make use of potential add-on, up-selling or cross-selling opportunities</p> <p>5.4 Summarise agreements made in accordance with organisational procedures and close the sale</p>
Additional information	
N/A	
Unit aim (s)	This unit aims to provide the skills to handle and overcome sales objections in order to be able to close the sale.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	A/502/8561 Complying with legal, regulatory and ethical requirements in a sales or marketing role
Level:	2
Credit Value:	2
GLH	13
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the legal, regulatory and ethical requirements in a sales or marketing role	1.1 Explain the legal requirements of a sales or marketing role 1.2 Explain the regulatory requirements of a sales or marketing role 1.3 Explain the ethical requirements of a sales or marketing role 1.4 State organisational procedures for raising legal, regulatory and ethical concerns relating to a sales or marketing role 1.5 Identify to whom non-compliance issues should be referred 1.6 Explain when and how to refer legal, regulatory and ethical concerns to others 1.7 Describe the possible consequence of non-compliance with legal, regulatory or ethical requirements
2. Be able to comply with organisational policies and procedures for legal, regulatory and ethical requirements in a sales or marketing role	2.1 Behave in a way that meets organisational ethical procedures, policies and standards 2.2 Identify areas where legal, regulatory or ethical issues may arise 2.3 Obtain advice on matters where legal, regulatory or ethical issues might exist 2.4 Work within the limits of responsibility and authority in a sales or marketing role

	2.5 Report issues, problems and actions relating to legal, regulatory or ethical matters in the agreed format
Additional information N/A	
Unit aim (s)	This unit aims to support learners in understanding and adhering to organisational legal, regulatory and ethical requirements.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	J/502/8594 Selling at exhibitions
Level:	2
Credit Value:	5
GLH	28
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to assess the relevance of exhibitions for the organisation	<p>1.1 Explain the purpose of exhibitions, trade fairs and conferences and how they produce sales opportunities</p> <p>1.2 Identify which events are most appropriate to the industry/sector and organisation and explain why</p> <p>1.3 Explain the importance of the sales event to achieving organisational plans and targets</p> <p>1.4 Describe how to evaluate sales events and measure their overall success</p>
2. Understand how to prepare for and sell at exhibitions	<p>2.1 Describe how to prepare for exhibitions</p> <p>2.2 Explain the advantages and disadvantages of different methods and processes for collecting and recording sales leads information</p> <p>2.3 Explain the importance of following up leads after the event</p>
3. Be able to prepare for an exhibition	<p>3.1 Identify the targets for sales and potential sales during the exhibition or trade fair</p> <p>3.2 Provide information about the event that is attractive to customers</p> <p>3.3 Agree procedures for collecting names, addresses and business cards of potential customers attending the event</p> <p>3.4 Identify the dress code for the event</p> <p>3.5 Obtain up to date product literature and prices lists</p>

	<p>3.6 Collect customer testimonials and case studies to support sales messages, for use at the event</p> <p>3.7 Identify target prospects from exhibition delegate lists</p> <p>3.8 Review other exhibitors before the event to determine whether own organisation's products or services complement or compete with other products or services</p> <p>3.9 Identify areas of compatibility and joint opportunities for the sale of add-ons, up selling or cross selling with other exhibitors before the event</p>
4. Be able to sell at an exhibition	<p>4.1 Use verbal and non-verbal communication to attract and engage the target audience</p> <p>4.2 Find quick ways to establish customers' needs and wants</p> <p>4.3 Identify up-selling and cross-selling opportunities</p> <p>4.4 Gain commitment for sales or follow-up meetings after the event</p> <p>4.5 Make appointments for follow-up meetings, ensuring that the right people are available for that meeting</p>
5. Be able to evaluate own performance at an exhibition	<p>5.1 Evaluate the effectiveness of the organisation's, personal and team's sales approach at the event</p> <p>5.2 Provide feedback to colleagues to improve the planning for future events and/or to enhance products and/or services</p>
Additional information	
N/A	
Unit aim (s)	The aim of this unit is to develop knowledge, understanding and sales skills in selling at trade fairs and exhibitions.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A

Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)
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Title:	R/502/8601 Meeting customers' after sales needs
Level:	2
Credit Value:	3
GLH	14
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to investigate customer after sales needs	<p>1.1 Establish the nature of customers' after sales needs</p> <p>1.2 Communicate with customers in a way that conforms with quality and customer service standards at all times</p>
2. Be able to handle customers' after sales needs	<p>2.1 Deal with customers' after sales needs following organisational customer service standards and procedures</p> <p>2.2 Balance customers' needs with those of the organisation</p> <p>2.3 Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority</p> <p>2.4 Fulfil commitments made to customers in accordance with quality and customer service standards</p> <p>2.5 Record commitments made to customers</p>
3. Be able to review the after sales process	<p>3.1 Obtain customers' comments on service reliability from customers</p> <p>3.2 Analyse and report the findings to the relevant person in the organisation</p> <p>3.3 Make recommendations for improvements to after sales service provision in the light of customer feedback</p>
Additional information	
N/A	

Unit aim (s)	This unit aims to provide the knowledge of how after-sales service is provided in a way that meets your customer's needs.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	F/502/8559 Time planning in sales
Level:	2
Credit Value:	2
GLH	13
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to manage and prioritise time in a sales role	<p>1.1 Explain the importance of time management and its impact on sales objectives</p> <p>1.2 Describe how a sales team member uses and measures the use of time</p> <p>1.3 Describe best practice time management techniques</p> <p>1.4 Explain how to review the use of time spent on sales activities</p>
2. Be able to plan own time in a sales role	<p>2.1 Identify own long-term sales commitments and immediate goals</p> <p>2.2 Identify work-related priorities</p> <p>2.3 Identify the differences between tasks that are urgent and tasks that are important</p> <p>2.4 Consolidate tasks to reduce workload and time wastage</p> <p>2.5 Identify opportunities to gain support from others to complete work</p> <p>2.6 Develop a time plan or weekly schedule, prioritising all tasks in order of relative importance and urgency</p>
3. Be able to evaluate time planning in a sales role	<p>3.1 Identify unnecessary tasks that are not directly related to own objectives</p> <p>3.2 Use feedback from colleagues to identify strengths and weaknesses in the use of own time</p> <p>3.3 Identify productive periods of time</p>

	3.4 Identify the opportunities for improving the use of time
Additional information N/A	
Unit aim (s)	This unit aims to develop knowledge, understanding and skills in planning and evaluating time management in a sales role.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	R/502/8615 Obtaining and analysing sales-related information
Level:	3
Credit Value:	4
GLH	24
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the uses of sales-related information	<p>1.1 Explain the importance of up-to-date information for sales planning purposes</p> <p>1.2 Explain the benefits and risks of using a range of information sources to support sales activities</p> <p>1.3 Explain the limitations of sales-related information</p> <p>1.4 Explain the importance of reviewing sales data requirements for current and future use</p>
2. Understand how to use tools and methods to analyse sales- related information	<p>2.1 Explain the advantages and disadvantages of different systems to gather sales-related information</p> <p>2.2 Explain how to use different software packages for analysing and presenting sales-related information</p>
3. Be able to obtain sales-related information about customers, markets and competitors	<p>3.1 Specify the information needed to develop an understanding of customers, competitors and markets</p> <p>3.2 Identify sources that are capable of providing the required information about the organisation's markets, customers and competitors</p> <p>3.3 Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation</p>
4. Be able to use tools and methods to analyse sales-related information	<p>4.1 Select analytical tools and methods that are capable</p>

	<p>of providing the required degree of analysis of sales-related information</p> <p>4.2 Define the information needs of the target audience for different types of sales-related information</p> <p>4.3 Use the analytical protocols that are appropriate to the selected tools and methods</p> <p>4.4 Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information</p> <p>4.5 Validate the reliability and validity of the findings of the analysis</p> <p>4.6 Provide sales-related information to the target audience within the agreed timescale and budget</p>
Additional information	
N/A	
Unit aim (s)	<p>This unit aims to provide the knowledge and skills needed to obtain and analyse information that helps to understand the markets</p> <p>for products and/or services and the volume, mix and value of the products or services sold.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	H/502/8618 Obtaining and Analysing Competitor Information
Level:	3
Credit Value:	3
GLH	18
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to validate information about competitors	<p>1.1 Explain how and where to source information about competitors</p> <p>1.2 Explain how to validate sourced information about competitors against recognised criteria</p> <p>1.3 Describe the advantages and disadvantages of qualitative and quantitative methods for collecting competitor information</p>
2. Understand the uses of competitor information for sales-related activities	<p>2.1 Explain the purpose of obtaining and analysing information about competitors</p> <p>2.2 Explain organisational policy on the recording of competitor information</p> <p>2.3 Identify criteria that can be used to compare organisations with their competitors</p> <p>2.4 Explain how to assess the impact of competitor activity on organisations</p>
3. Be able to use competitor information for sales-related activities	<p>3.1 Obtain and record information about competitors in ways that allow analysis to be undertaken</p> <p>3.2 Identify competitors' objectives</p> <p>3.3 Identify the nature of potentially threatening competitor activity</p> <p>3.4 Estimate the relative importance of competitor activity on profitability and market share growth</p>

	<p>3.5 Review the impact of competitor activity on sales activities</p> <p>3.6 Propose sales activities in response to competitors' activities</p>
<p>Additional information</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit is all about obtaining and analysing information to understand the impact of competitors on the organisation's sales activities.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Sales NOS (CfA)</p>

Title:	K/502/8622 Buyer behaviour in sales situations
Level:	3
Credit Value:	3
GLH	27
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the impact of different models of buyer behaviour on the sales cycle	1.1 Explain the consumer buying decision-making process 1.2 Explain how the consumer buying decision-making process affects the sales cycle 1.3 Describe the influences that affect the consumer decision-making process 1.4 Explain the organisational buying decision-making process 1.5 Explain how the organisational buying decision-making process affects the sales cycle 1.6 Describe the influences that affect the organisational buying decision-making process 1.7 Explain the impact of the different roles within the decision-making unit on the sales cycle
2. Be able to respond to the buyer at each stage of the decision making process	2.1 Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process 2.2 Respond to different decision-makers in a sales situation in a way that is appropriate to their role 2.3 Use objections as buying opportunities 2.4 Confirm solution(s) offered meet the needs and wants of decision-makers

Additional information	
N/A	
Unit aim (s)	This unit aims to provide the knowledge, understanding and skill necessary to enable the sales person to respond to different members of the decision-making unit, whether in consumer markets or organisational markets.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	L/502/8628 Pricing for sales promotions
Level:	3
Credit Value:	5
GLH	34
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand price-based promotions	<p>1.1 Describe the strengths and weaknesses of different types of price-based promotions, including incentives and discounts</p> <p>1.2 Describe the different approaches used by competitors to respond to price changes and price-based promotions</p> <p>1.3 Explain how to identify and use sales opportunities resulting from a price-based promotion for higher volume and value sales</p> <p>1.4 Describe how to assess the organisational costs and benefits of price-based promotions</p> <p>1.5 Identify legal and ethical issues relating to price-based promotions</p>
2. Be able to justify price-based promotions as part of a promotional strategy	<p>2.1 Identify situations where a price-based promotion is justified to meet sales targets</p> <p>2.2 Calculate the affordability of a proposed price-based promotion and its effects on the achievement of sales volume and profitability targets</p> <p>2.3 Identify how to gain internal support or guidance on implementing price-based promotions</p>
3. Be able to develop and present proposals for price-based promotions	<p>3.1 Identify risks in a price-based promotion</p> <p>3.2 Identify contingencies appropriate to the risks identified</p>

	<p>3.3 Prepare proposals to justify price-based promotions in accordance with organisational procedures</p> <p>3.4 Present a proposal following organisational procedures</p>
4. Understand how to evaluate price based promotions	<p>4.1 Explain the importance of measuring the impact of price-based promotions on sales activities</p> <p>4.2 Explain the importance of evaluating the likely impact of price-based promotions on future sales activities</p> <p>4.3 Describe the methods and mechanisms for measuring the success of price-based promotions</p> <p>4.4 Describe how monitoring information is used to inform the design of future promotions</p>
5. Be able to implement and evaluate price-based promotions	<p>5.1 Implement price-based promotions within the scope of own authority</p> <p>5.2 Monitor customer and competitor reactions to a price-based promotion against agreed criteria</p> <p>5.3 Evaluate the impact of the promotion on market conditions against agreed criteria</p> <p>5.4 Identify how the outcomes of price-based promotions will be used to inform future promotions</p>
Additional information	
N/A	
Unit aim (s)	This unit aims to provide the knowledge and skills necessary for designing and implementing price promotions, incentives or discounts in line with organisational pricing policies.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	L/502/8631 Preparing and delivering a sales presentation
Level:	3
Credit Value:	4
GLH	28
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the factors for consideration in the preparation of sales presentations	<ul style="list-style-type: none"> 1.1 Explain the importance of presentations to the achievement of sales targets 1.2 Explain the difference between formal and informal presentations 1.3 Explain the importance of setting aims and objectives when preparing a presentation 1.4 Describe how customer characteristics and buying behaviours will influence a presentation 1.5 Identify who to go to for support relating to the presentation 1.6 Explain the legal, social and ethical constraints that need to be considered when designing and delivering sales presentations
2. Be able to prepare a sales presentation	<ul style="list-style-type: none"> 2.1 Describe the needs of the customer or audience 2.2 Set objectives for the sales presentation ensuring they reflect the customers' or audience's needs and interests 2.3 Assess the suitability of the venue for the presentation, and review issues relating to its size, acoustics and layout 2.4 Identify and prepare resources for delivery of the presentation 2.5 Obtain promotional material that will enhance the presentation

	<p>2.6 Include the product/service benefits and/or unique selling propositions in the presentation</p> <p>2.7 Structure the presentation in line with its objectives</p> <p>2.8 Ensure the presentation complements any proposal already supplied to the customer</p> <p>2.9 Ensure the presentation can be delivered within the agreed timescale</p>
<p>3. Understand how to deliver sales presentations</p>	<p>3.1 Describe how to use verbal and non-verbal communications in presentations</p> <p>3.2 Explain the importance of rehearsing a presentation</p> <p>3.3 Describe techniques to capture and retain the audience's attention</p> <p>3.4 Describe the organisational methods for reporting and recording the outcome of presentations</p>
<p>4. Be able to deliver a sales presentation</p>	<p>4.1 Use pitch, tone and pace of delivery to engage the audience</p> <p>4.2 Deliver a presentation that captures and retains the audience's attention</p> <p>4.3 Use visual aids and/or publicity materials to support the presentation</p> <p>4.4 Provide the audience with opportunities to ask questions and raise objections</p> <p>4.5 Respond to questions, concerns and objections from the customer or audience in a way that gives a positive image of the organisation and its products and/or services</p> <p>4.6 Gain commitment to proceed with the sale</p> <p>4.7 Evaluate the effectiveness of the presentation in the light of stakeholder feedback and subsequent sales related activities and outcomes</p>
<p>Additional information</p> <p>N/A</p>	

Unit aim (s)	This unit aims to provide the necessary skills for developing and delivering sales presentations.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	L/502/8659 Developing and implementing sales support and customer service programmes
Level:	4
Credit Value:	5
GLH	35
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the requirement to provide sales support and customer service programmes	<p>1.1 Explain the advantages and disadvantages of customer care programmes, customer support and customer service programmes</p> <p>1.2 Explain how customer care programmes, customer support and customer service programmes add value for customers and the organisation</p> <p>1.3 Describe how service standards are developed and used to manage performance in customer service</p> <p>1.4 Explain quality assurance models that help to manage customer service quality</p> <p>1.5 Explain how to ensure that the level of service provided continues to meet customer expectations</p>
2. Be able to develop sales support and/or customer service programmes	<p>2.1 Plan a sales support and customer service programme in accordance with the sales strategy</p> <p>2.2 Evaluate the effectiveness of existing processes for managing and providing service to customers against agreed criteria</p> <p>2.3 Develop a sales support or customer service programme, or recommend</p>

	<p>improvements to existing processes that meet the agreed criteria</p> <p>2.4 Establish resource requirements directly related to the sales area to deliver sales support and customer management to the agreed standard</p>
3. Be able to implement sales support and customer service programmes	<p>3.1 Identify appropriate ICT support for effective communication with customers</p> <p>3.2 Adapt to changing circumstances in implementing sales support and customer service programmes in accordance with the plan</p> <p>3.3 Record customer management information in accordance with organisational procedures</p> <p>3.4 Keep those concerned with sales support and customer service up to date with customer management information</p> <p>3.5 Ensure ongoing compliance with quality initiatives, processes and procedures and service level agreements as agreed between the customer and the organisation</p> <p>3.6 Take prompt action in the event of shortfalls in service standards in accordance with the sales strategy</p>
Additional information	
N/A	
Unit aim (s)	This unit aims to provide the knowledge and skills on how to ensure that high levels of sales and customer service support are delivered.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	D/502/8634 Developing and implementing sales call plans
Level:	3
Credit Value:	3
GLH	22
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to develop a sales call plan	1.1 Identify customers and prospects to be contacted that meet the agreed criteria 1.2 Determine the time available to deal with prospective and/or existing customers 1.3 Prepare and assemble sales materials and sales perspectives that can be used during contact with customers or prospects 1.4 Identify sales targets based on access to customers and prospects
2. Be able to undertake a sales call	2.1 Identify the customer's or prospect's current situation, needs and wants in relation to products and/or services 2.2 Identify customer needs and wants 2.3 Establish the strength of the prospect and their level of interest 2.4 Identify competitors with whom the prospect or customer has connections 2.5 Promote the organisation's strengths 2.6 Use testimonials to highlight benefits and features of products and/or services 2.7 Explain to the customer how the products and/or services can solve customer problems and add value to the customer experience 2.8 Identify actions that need to be taken to progress, and close the sale

	2.9 Identify ways of improving sales techniques through a review of the sales call
Additional information N/A	
Unit aim (s)	This unit aims to provide the knowledge and skills needed to develop and implement a sales call plan.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	K/502/8636 Assisting customers in obtaining finance for purchases
Level:	3
Credit Value:	2
GLH	11
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the conditions for obtaining finance for purchases	1.1 Identify the advantages and disadvantages of different methods used for raising finance for purchases 1.2 Identify the organisation's preferred supplier of financial packages 1.3 Identify the additional financial services which are appropriate to sell to customers 1.4 Explain the types of terms and conditions that apply to different financial packages 1.5 Describe the levels of authority of those involved in assisting customers to obtain finance for purchases 1.6 Explain the organisation's legal procedures for completion of finance documentation
2. Be able to propose financial options to customers	2.1 Determine the customer's need for finance, the amount of borrowing required and any special requirements or constraints 2.2 Agree the preferred financial option with the customer 2.3 Gather sufficient information to enable the application for finance to proceed 2.4 Resolve shortfalls and inconsistencies in information supplied by the customer 2.5 Provide the customer with opportunities to ask questions and raise concerns

<p>3. Be able to complete finance arrangements for purchases</p>	<p>3.1 Inform the customer of the terms and conditions of the financial arrangements</p> <p>3.2 Provide written proposals for a finance agreement to the customer</p> <p>3.3 Ensure all documentation is completed in compliance with legal and regulatory requirements</p>
<p>Additional information</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>The aim of this unit is to develop knowledge, understanding and sales skills in assisting customers to obtain finance to buy products and/or services.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Sales NOS (CfA)</p>

Title:	T/502/8638 Assessing customers' credit status
Level:	3
Credit Value:	4
GLH	26
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to assess customer credit status	<p>1.1 Explain the purpose of assessing customers' credit status</p> <p>1.2 Describe a range of internal and external checks that may be used to assess customer credit status</p> <p>1.3 Explain how liquidity ratios are calculated and are used to assess customer credit status</p> <p>1.4 Explain the importance of following organisational procedures when carrying out a credit status assessment</p>
2. Be able to assess the credit status of customers	<p>2.1 Identify the customers' requirements for sales and credit</p> <p>2.2 Explain to the customer the process the organisation will use for approving credit and setting a credit limit</p> <p>2.3 Gather sufficient financial information from the customer to support credit searches</p> <p>2.4 Ensure the customer is financially secure by analysing their liquidity ratios</p> <p>2.5 Confirm the creditworthiness of customers by conducting checks through banks, credit rating agencies or supplier references and internal colleagues</p> <p>2.6 Complete a formal agreement with the customer in line with the organisational procedures if the credit searches have proved satisfactory</p>

	2.7 Explain to the customer if the credit searches have proved negative and offer cash trading only
3. Be able to monitor the credit status of customers	3.1 Monitor the customer's account regularly following the organisation's procedures 3.2 Liaise with the customer regarding any changes in credit limits and the status of their account in accordance with organisational procedures
Additional information	
N/A	
Unit aim (s)	This unit aims to provide the knowledge and skills needed to assess a customer's creditworthiness before allowing them to open an account and use credit limits offered by the organisation. Credit status is also assessed when a customer starts dealing in a new or different area of business.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	T/502/8624 Communicating using digital marketing/sales channels
Level:	3
Credit Value:	4
GLH	26
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to plan the use of digital media for a specific message, audience and recipients	<ul style="list-style-type: none"> 1.1 Explain the selection of the organisation's targeted customers 1.2 Describe expected target audience responses to different electronic media communication methods 1.3 Describe the characteristics, advantages and disadvantages of different software packages for presenting marketing information 1.4 Explain the requirements of using multiple digital marketing technologies
2. Be able to plan the use of digital media for a specific message, audience and recipients	<ul style="list-style-type: none"> 2.1 Confirm the sales and marketing objectives for the digital communication, including response rates and sales generated return on investment 2.2 Identify the criteria to be used in selecting recipients in target audience 2.3 Source and acquire targeted lists and databases of recipients in accordance with the plan 2.4 Confirm the range of electronic media best suited to communicating to the target audience in line with the sales and marketing objectives 2.5 Agree with relevant people the marketing communications message designed to engage the customer and which is appropriate for the media selected

<p>3. Be able to check the digital message can be accessed and/or delivered</p>	<p>3.1 Check any links, keywords, and supporting attachments allow access by recipients to further information</p> <p>3.2 Identify any risks that the message might be labelled as 'spam' and take action to minimise such risks</p> <p>3.3 Enable click-through tracking in digital messages in accordance with the plan</p> <p>3.4 Send messages to targeted customers in accordance with the plan</p> <p>3.5 Set up reporting system for 'undeliverables' in accordance with organisational procedures</p>
<p>4. Be able to monitor and evaluate the response to digital activity and take any corrective action</p>	<p>4.1 Record undelivered messages in accordance with reporting system</p> <p>4.2 Identify repeat communications requirements in line with the sales and marketing objectives</p> <p>4.3 Monitor and evaluate the responses to digital marketing against agreed criteria</p> <p>4.4 Report the findings of the evaluation in accordance with organisational procedures</p>
<p>Additional information</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to provide the knowledge and skills needed to carry out digital marketing via multiple channels using digital media which are both media and technology independent. These can therefore include, for example, email, SMS (Short Message Service or text messaging), RSS (Rich Text Syndication/Real Simple Syndication) websites, blogs and user-generated content.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Sales NOS (CfA)</p>

Title:	A/502/8639 Contributing to the development and launch of new products and/or services
Level:	3
Credit Value:	4
GLH	26
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the product development process	<p>1.1 Describe the sales forecasting technique used by the organisation</p> <p>1.2 Explain the market features and trends relating to products or services in the market</p> <p>1.3 Explain the customer base for the proposed product in terms of their wants and needs</p>
2. Be able to contribute to the product and/or service development and launch process	<p>2.1 Consult with colleagues and selected customers about a new product or service strategy</p> <p>2.2 Generate ideas and/or enhancements to others' ideas for new products or services that meet the development criteria</p> <p>2.3 Screen new ideas in accordance with the organisation's guidelines, marketing objectives</p> <p>2.4 Test the market for the proposed product and/or service in accordance with the development plan</p> <p>2.5 Provide information about existing customers, their needs, wants and behaviours in accordance with the market analysis specification</p> <p>2.6 Support the preparation of a business case for the launch of a new product and/or service in accordance with the development plan</p>

	<p>2.7 Forecast sales to support business case preparation in accordance with the development plan</p> <p>2.8 Prepare information for customers about the new product and/or service in accordance with the development plan</p> <p>2.9 Use feedback from stakeholders to refine the new product and/or service</p>
<p>Additional information</p> <p>N/A</p>	
Unit aim (s)	<p>This unit aims to provide the knowledge and skills needed to contribute to the development of new products and/or services.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>N/A</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Sales NOS (CfA)</p>

Title:	D/502/8651 Prioritising information for sales planning
Level:	4
Credit Value:	3
GLH	20
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand sources and types of information that support sales	<p>1.1 Describe the information about customers' behaviour that is relevant to sales</p> <p>1.2 Explain the nature of competitors' sales activities</p> <p>1.3 Explain the relevance of information from the external business environment to sales</p> <p>1.4 Describe sources of business information relevant to sales</p>
2. Understand internal information that supports sales	<p>2.1 Describe the customer base of the organisation</p> <p>2.2 Explain organisational information storage procedures</p> <p>2.3 Explain organisational procedures for communicating sales-based information to the sales team</p>
3. Be able to carry out a business audit of the internal and external sales environment	<p>3.1 Obtain information about customers and competitors from a variety of sources to enable a business audit to be conducted</p> <p>3.2 Organise sales information to support effective sales planning</p> <p>3.3 Prioritise the internal strengths and weaknesses, and external opportunities and threats the organisation faces in relation to sales objectives</p>
4. Be able to use sales information to support the sales planning function	<p>4.1 Monitor trends and developments that impact on business and sales activities against agreed criteria</p>

	<p>4.2 Identify market developments and their implications for organisational sales plans</p> <p>4.3 Ensure that sales information is communicated to those who need it in accordance with organisational procedures</p>
<p>Additional information</p> <p>N/A</p>	
Unit aim (s)	<p>This unit aims to provide the knowledge, understanding and skills to ensure an organisation has a clear and up-to-date picture of its markets and can use appropriate information to support the development of sales strategies and plans.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>N/A</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Sales NOS (CfA)</p>

Title:	M/502/8654 Monitoring and managing sales team performance
Level:	4
Credit Value:	5
GLH	32
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand methods of monitoring sales team performance	<ul style="list-style-type: none"> 1.1 Explain the importance of monitoring sales team performance 1.2 Explain the importance of giving feedback on performance 1.3 Describe the role of key performance indicators in monitoring sales team performance 1.4 Explain the importance of encouraging sales team members to ask questions, make suggestions and seek clarification 1.5 Explain the use of sales-related information in managing the performance of sales team members in formal performance appraisals 1.6 Explain the use of tools in monitoring performance of the team
2. Be able to manage performance of the sales team	<ul style="list-style-type: none"> 2.1 Determine key performance indicators for monitoring the performance of individual sales staff that are appropriate for their targets and objectives 2.2 Plan the work of the sales team, identifying priorities, resources and/or critical activities 2.3 Provide practical help to sales staff in support of achieving their sales objectives 2.4 Monitor the quantity and quality of sales team members' work against agreed key performance indicators 2.5 Provide feedback to sales staff on their sales performance

	<p>2.6 Give public recognition to successful performance</p> <p>2.7 Agree ways of improving performance in cases of unacceptable performance</p>
<p>Additional information</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to provide knowledge and skills for monitoring and managing the performance of a sales team.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Sales NOS (CfA)</p>

Title:	A/502/8656 Developing sales proposals
Level:	4
Credit Value:	5
GLH	30
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how to write sales proposals	<p>1.1 Explain how to write a proposal that differentiates the offer from that of a competitor and promotes organisational strengths</p> <p>1.2 Describe how to put together a persuasive argument based on quantitative and qualitative evidence</p> <p>1.3 Explain the importance of addressing the brief in tender documentation</p> <p>1.4 Explain the importance of using the “house style” in proposals</p> <p>1.5 Explain the legal and ethical issues relating to sales proposals</p> <p>1.6 Explain the client’s procedures for submitting sales proposals</p>
2. Be able to develop sales proposals	<p>2.1 Ensure the prospect’s or customer’s requirements are addressed in the proposal</p> <p>2.2 Ensure that all identified issues requiring clarification are resolved before the proposal is finalised</p> <p>2.3 Identify the conditions and constraints which need to be included within the proposal in order to protect the organisation’s interests</p> <p>2.4 Present the proposal in “house style”</p> <p>2.5 Ensure that the proposal is based on market factors</p> <p>2.6 Provide the required level of detail as briefed by the prospect or customer</p> <p>2.7 Ensure that the price reflects the value within the proposal</p>

	<p>2.8 Gain internal approval before submission</p> <p>2.9 Supply the proposal within the agreed timescale</p>
3. Be able to evaluate the proposal	<p>3.1 Obtain feedback from colleagues and the customer on the proposal</p> <p>3.2 Evaluate the outcome of the proposal and recommend improvements for the future</p>
Additional information	
N/A	
Unit aim (s)	This unit aims to provide the knowledge and skills for preparing sales proposals for customers.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	F/502/8657 Building and retaining sales relationships
Level:	4
Credit Value:	5
GLH	34
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the benefits and risks of planning and investing in sales relationships	<p>1.1 Explain the criteria by which to evaluate and prioritise customers with whom the organisation should build sales relationships</p> <p>1.2 Explain the long term value that customers can bring to the organisation through developing sales relationships with them</p> <p>1.3 Describe how to identify risks involved in relationships with customers</p> <p>1.4 Explain methods of monitoring and evaluating customer relationships</p>
2. Be able to build sales relationships	<p>2.1 Prioritise customers with whom to build sales relationships</p> <p>2.2 Balance existing and potential customer needs and expectations with those of the organisation's sales strategy</p> <p>2.3 Develop a customer relationship plan which takes into account the organisation's resource requirements</p> <p>2.4 Offer products and/or services in terms of customer needs and expectations</p> <p>2.5 Negotiate sales solution(s) with the customer that are mutually beneficial</p> <p>2.6 Identify further opportunities to develop the relationship with the customer</p>
3. Be able to retain sales customers	<p>3.1 Collate customer feedback about the organisation's provision of products and/or services in accordance with organisational procedures</p>

	<p>3.2 Ensure that the quality and consistency of products and/or services is being maintained</p> <p>3.3 Manage customer complaints or problems and provide sales solutions in accordance with organisational procedures and standards</p> <p>3.4 Ensure feedback is given to colleagues on the status of the sales relationship</p> <p>3.5 Monitor and evaluate the sales relationship in accordance with organisational procedures</p>
Additional information	
N/A	
Unit aim (s)	The unit is designed to enable build strong relationships with customers and understand customer's needs and expectations more clearly by working in partnership with them.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	H/600/9724 Communicate information and knowledge
Level:	2
Credit Value:	3
GLH	10
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to identify the information required, and its reliability for communication.	1.1 Explain the information and knowledge that needs communicating. 1.2 Identify the target audience requiring the information and knowledge.
2. Be able to understand communication techniques and methods.	2.1 Identify what techniques and methods can be used to communicate information and knowledge. 2.2 Explain how to select the most appropriate technique and method.
3. Be able to communicate information and knowledge using appropriate techniques and methods.	3.1 Communicate to target audience using the appropriate techniques and methods. 3.2 Explain how the target audience has received and understood the information communicated.
4. Be able to adapt communication techniques and methods according to target audience response.	4.1 Explain how to modify communication techniques and methods in response to verbal and non-verbal feedback.
Additional information N/A	
Unit aim (s)	This unit will ensure that learners are able to communicate selected information and knowledge to a target audience using appropriate communication techniques and methods.

Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	MSC E11 Communicate information and knowledge

Title:	L/600/9586 Manage own professional development within an organisation
Level:	3
Credit Value:	4
GLH	20
Learning Outcomes	Assessment Criteria
The learner will:	The learner can:
1. Be able to assess own career goals and personal development.	1.1 Identify own career and personal goals. 1.2 Assess how own career goals affect work role and professional development.
2. Be able to set personal work objectives.	2.4 Agree SMART (Specific, Measurable, Achievable, Realistic and Time-bound) personal work objectives in line with organisational objectives.
3. Be able to produce a personal development plan.	3.1 Identify gaps between objectives set, own current knowledge and skills. 3.2 Produce a development plan
4. Be able to implement and monitor own personal development plan.	4.1 Plan activities identified in own development plan. 4.2 Explain how to monitor and review own personal development plan.
Additional information	
N/A	
Unit aim (s)	The purpose of this unit is to provide learners with the knowledge and understanding of managing their own professional development within an organisation. The learner should be able to display that they can identify their own professional development needs to meet the demands of the organisation.

Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	R/600/9587 Develop, maintain and review personal networks
Level:	4
Credit Value:	4
GLH	25
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the benefits of networking and the need for data privacy.	1.1 Evaluate the benefits of networking with individuals and organisations. 1.2 Identify individuals and organisations that would provide benefits to own organisation and networks. 1.3 Explain the need for confidentiality with networking contacts.
2. Be able to develop a personal network of contacts.	2.1 Develop networks that will provide personal and organisational benefit. 2.2 Develop guidelines for working with networks in line with organisational procedures.
3. Be able to review networking relationships.	3.1 Assess the value own current personal network. 3.2 Evaluate own experience with existing contacts and use these to inform future actions.
Additional information N/A	
Unit aim (s)	This unit aims to equip the candidate with the ability to create, review, develop and maintain personal networks. The candidate is able to develop networks to support both current and future work, with an understanding of the need that exchanging

	information and other linked resources has mutual benefit.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	Y/600/9686 Lead and manage meetings
Level:	3
Credit Value:	4
GLH	20
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to prepare to lead a meeting.	1.1 Perform activities needed to be carried out in preparation for leading a meeting. 1.2 Produce documentation in support of activities.
2. Be able to manage meeting procedures.	2.1 Identify any formal procedures that apply in own organisation.
3. Be able to chair a meeting.	3.1 Manage the agenda in co-operation with participants to ensure meeting objectives are met. 3.2 Produce minutes of the meeting and allocate action points after discussions.
4. Be able to undertake post-meeting tasks.	4.1 Explain that the minutes of the meeting provide an accurate record of proceedings. 4.2 Communicate and follow up meeting outcomes to relevant individuals. 4.3 Evaluate whether the meeting's objectives were met and identify potential improvements.
Additional information N/A	
Unit aim (s)	This unit will ensure that learners are able to prepare for, lead and follow up issues identified in meetings.

Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	Y/601/1230 Organise the delivery of reliable customer service
Level:	3
Credit Value:	6
GLH	40
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Plan and organise the delivery of reliable customer service	<p>1.1 Plan, prepare and organise everything they need to deliver services or products to different types of customers</p> <p>1.2 Organise what they do to ensure that they are consistently able to give prompt attention to your customers</p> <p>1.3 Reorganise their work to respond to unexpected additional workloads</p>
2. Review and maintain customer service delivery	<p>2.1 Maintain service delivery during very busy periods and unusually quiet periods</p> <p>2.2 Maintain service delivery when systems, people or resources have let them down</p> <p>2.3 Consistently meet their customers' expectations</p> <p>2.4 Balance the time they take with their customers with the demands of other customers seeking their attention</p> <p>2.5 Respond appropriately to their customers when customers make comments about the products or services they are offering</p> <p>2.6 Alert others to repeated comments made by their customers</p> <p>2.7 Take action to improve the reliability of their service based on customer comments</p> <p>2.8 Monitor the action they have taken to identify improvements in the service they give to their customers</p>

<p>3. Use recording systems to maintain reliable customer service</p>	<p>3.1 Record and store customer service information accurately following organisational guidelines</p> <p>3.2 Select and retrieve customer service information that is relevant, sufficient and in an appropriate format</p> <p>3.3 Quickly locate information that will help solve a customer's query</p> <p>3.4 Supply accurate customer service information to others using the most appropriate method of communication</p>
<p>4. Understand how to organise the delivery of reliable customer service</p>	<p>4.1 Describe organisational procedures for unexpected situations and their role within them</p> <p>4.2 Describe resource implications in times of staff sickness and holiday periods and their responsibility at these times</p> <p>4.3 Explain the importance of having reliable and fast information for their customers and their organisation</p> <p>4.4 Evaluate the organisational procedures and systems for delivering customer service</p> <p>4.5 Identify useful customer feedback and explain how to decide which feedback should be acted on</p> <p>4.6 Describe how to communicate feedback from customers to others</p> <p>4.7 Evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information</p> <p>4.8 Explain the legal and regulatory requirements regarding the storage of data</p>
<p>Additional information</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit is about how the learner delivers and maintains excellent and reliable customer service. The role of the learner may or may not involve supervisory or management responsibilities but they are expected to take some responsibility for the resources and systems they use which</p>

	support the service that they give. In the learner's job they must be alert to customer reactions and know how they can be used to improve the service that they give. In addition, customer service information must be recorded to support reliable service.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Specified in the Customer Service Assessment Strategy 2010
Details of the relationship of the unit and relevant national occupational standards	This Unit directly relates to Unit B10 of the Customer Service NOS 2010

Title:	M/600/9676 Support learning and development within own area of responsibility
Level:	4
Credit Value:	5
GLH	25
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to identify the learning needs of colleagues in own area of responsibility.	1.1 Identify gaps between requirements of colleagues' current or future work roles and their existing knowledge, understanding and skills. 1.2 Prioritise learning needs of colleagues. 1.3 Produce personal development plans for colleagues in own area of responsibility.
2. Understand how to develop a learning environment in own area of responsibility.	2.1 Explain the benefits of continual learning and development. 2.2 Explain how learning opportunities can be provided for own area of responsibility.
3. Be able to support colleagues in learning and its application.	3.1 Identify information, advice and guidance to support learning. 3.2 Communicate to colleagues to take responsibility for their own learning. 3.3 Explain to colleagues how to gain access to learning resources. 3.4 Support colleagues to practise and reflect on what they have learned.
4. Be able to evaluate learning outcomes and future learning and development of colleagues.	4.1 Examine with each colleague, whether the learning activities undertaken have achieved the desired outcomes.

	4.2 Support colleagues when updating their personal development plan.
Additional information N/A	
Aims of unit	This unit helps learners to understand the importance of learning and to develop a learning environment within own area of responsibility.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	T/502/8641 Leading a sales or marketing team
Level:	3
Credit Value:	4
GLH	25
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to set targets for the sales or marketing team	<p>1.1 Agree Specific, Measurable, Achievable, Realistic and Time-bound (SMART) targets for individuals and sales or marketing team performance</p> <p>1.2 Agree personal objectives for individual members of the sales or marketing team</p>
2. Be able to support the motivation of the sales or marketing team	<p>2.1 Provide support to team members toward achieving targets and objectives</p> <p>2.2 Give recognition to individuals' successes</p> <p>2.3 Use individual rewards and incentives to maintain morale in a sales or marketing environment</p> <p>2.4 Encourage team members to put forward ideas</p> <p>2.5 Assist team members to overcome feelings of 'rejection' that are experienced as a result of a lack of success in sales or marketing endeavours</p>
3. Be able to monitor and evaluate the progress of the sales or marketing team	<p>3.1 Monitor activities and progress across the team in accordance with the sales or marketing plan</p> <p>3.2 Monitor the achievements of individual and sales or marketing team targets in accordance with the sales or marketing plan</p> <p>3.3 Monitor customer interaction with individual team members in accordance with the sales or marketing plan</p>

	<p>3.4 Evaluate customer interaction with individual team members against agreed criteria</p> <p>3.5 Monitor compliance with legal, regulatory and ethical requirements relating to sales or marketing team activities</p> <p>3.6 Appraise the success of sales or marketing activities against agreed objectives and targets</p> <p>3.7 Identify areas for improvement in sales or marketing activities</p>
Additional information	
N/A	
Unit aim (s)	This unit aims to provide the skills needed to lead a sales or marketing team
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Sales NOS (CfA)

Title:	F/502/8643 Managing the induction and probation of sales staff
Level:	3
Credit Value:	3
GLH	15
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the induction and probation processes for sales staff	<p>1.1 Explain the purpose of induction and probation periods for sales staff</p> <p>1.2 Describe organisational procedures for induction and probation for sales staff</p> <p>1.3 Explain organisational employment policies and procedures including:</p> <p style="padding-left: 40px;">Induction and Probation Employment Rights and Responsibilities Timekeeping and Absence Health and Safety</p> <p>1.4 Explain the basis of the induction programme and its contribution to efficient sales performance</p> <p>1.5 Describe how mentoring, coaching and buddying might be used to induct new sales staff</p> <p>1.6 Describe the actions to be taken in the event of unsatisfactory performance by sales probationers</p>
2. Be able to manage the induction and probation of new sales staff	<p>2.1 Manage the induction and probation of new sales staff and their expectations in accordance with organisational procedures</p> <p>2.2 Agree targets with new sales staff for probationary period</p>

	<p>2.3 Use mentoring, coaching, or buddying systems in accordance with the induction programme</p> <p>2.4 Review the progress of new sales staff at agreed intervals and identify areas for development</p> <p>2.5 Provide feedback and support to new sales staff in accordance with identified developmental needs</p>
<p>Additional information</p> <p>N/A</p>	
Unit aim (s)	<p>This unit aims to provide the knowledge and skills involved in providing a satisfactory induction and probation for members of the sales team.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>N/A</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Sales NOS (CfA)</p>

Title:	L/502/8662 Recruiting sales team members
Level:	4
Credit Value:	4
GLH	23
Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the recruitment and selection process relating to sales	<ul style="list-style-type: none"> 1.1 Explain the advantages and disadvantages of different methods of recruitment and selection of sales staff 1.2 Describe the information that should be included in a job advertisement 1.3 Identify the legislation that relates to recruitment and selection 1.4 Explain the advantages and disadvantages of different types of specialist expertise available to select sales staff 1.5 Describe the criteria by which sales applications are sifted 1.6 Explain what, how, and why feedback should be made available to all candidates
2. Be able to prepare to recruit and select sales team members	<ul style="list-style-type: none"> 2.1 Agree the recruitment and selection methods with sales and human resources colleagues 2.2 Develop the technical sales component of job profiles 2.3 Develop the technical sales component of person specifications 2.4 Keep within the agreed budget in the recruitment and selection process 2.5 Record the reasons for pre-interview selection decisions in accordance with organisational procedures 2.6 Devise a list of interview questions that address the key competences for a sales team member as defined in the person specification

<p>3. Be able to make selection decisions for sales team members</p>	<p>3.1 Contribute to interviews in accordance with agreed role 3.2 Use the agreed rating criteria to select staff 3.3 Record the reasons for selection decisions in accordance with organisational procedures 3.4 Complete post-interview formalities in accordance with organisational procedures</p>
<p>Additional information N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to provide the skills involved in recruiting and selecting members of the sales team.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Sales NOS (CfA)</p>