Level 2 NVQ Certificate/ Diploma in Sales (QCF) (6801-01/02)

February 2011 Version 1.0

City&
Guilds

Qualification at a glance

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

Title and level	City & Guilds number	Accreditation number
Level 2 NVQ Certificate in Sales (QCF)	6801-01	600/0930/5
Level 2 NVQ Diploma in Sales (QCF)	6801-02	600/0933/0

Contents

1   Introduction

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

Area	Description
Who are the qualifications for?	For learners who work or want to work in the sales sector. These qualifications are for those working in any of the following roles or roles similar to these: • Contact Centre Operator • Customer Service Assistant/Manager • Estate Agent • IT Technical Sales Specialist • Retail Assistant • Sales Representative • Travel Agent • Vehicle Sales Executive
What do the qualifications cover?	They allow learners to learn, develop and practise the skills required for employment and/or career progression in the sales sector.
Are the qualifications part of a framework or initiative?	The Level 2 NVQ Certificate in Sales (6801-01) serves as the competence qualification in the Sales Apprenticeship framework.
Who did we develop the qualifications with?	They were developed in association with the Council for Administration.
What opportunities for progression are there?	The qualifications allow candidates to progress into employment or to the following City & Guilds qualifications: • Level 3 NVQ Certificate/Diploma in Sales (6801-03/04) • Level 3 Certificate in Principles of Sales (7711-03) • Level 2/3 NVQ Certificate/Diploma in Marketing (7712-02/03/04) • Level 2/3 Certificate in Principles of Marketing (7734-02/03) • Level 2/3 NVQ Certificate/Diploma in Business and Administration (4428-02/03) • Level 2/3 Certificate in Principles of Business and Administration (4475-02/03)

Structure

Qualification	Min. no. of overall credits	Group A Mandatory (credits)	Group B Optional (credits)	Group C Optional (credits)
Level 2 NVQ Certificate in Sales	**22**	9	4 (min)	5 (min)
	min of 13 credits must be at Level 2			
Level 2 NVQ Diploma in Sales	**37**	9	4 (min)	20 (min)
	min of 23 credit must be at Level 2			

NB: Candidates can take a maximum of 8 credits from optional Group B.

Unit Group Key:

A – Mandatory	B – Optional Group B	C – Optional Group C

***Excluded combination** – indicated unit(s) cannot be taken together within any one qualification

City & Guilds unit number	Ofqual unit accreditation number	Unit title	Level	Credit	GLH	Group	*Excluded combination	Unit selected?
201	F/502/8559	Time planning in sales	2	2	13	A		
202	A/502/8561	Complying with legal, regulatory and ethical requirements in a sales or marketing role	2	2	13	A		
214	J/601/1210	Deliver reliable customer service	2	5	33	A		
203	L/502/8564	Selling face to face	2	4	25	B		
204	J/502/8577	Selling by telephone – inbound	2	4	27	B	205	
205	J/502/8580	Selling by telephone – outbound	2	4	27	B	204	
206	D/502/8584	Inputting and accessing sales or marketing data in information systems	2	2	15	C		
207	M/502/8587	Processing sales orders	2	2	17	C		
208	T/502/8588	Preparing and delivering a sales demonstration	2	3	20	C		
209	J/502/8594	Selling at exhibitions	2	5	28	C		
210	L/502/8595	Monitoring sales deliveries	2	2	10	C		
211	Y/502/8597	Supporting customers in obtaining finance for purchases	2	3	22	C		
212	H/502/8599	Generating and qualifying sales leads	2	2	15	C		
213	R/502/8601	Meeting customers' after sales needs	2	3	14	C		

City & Guilds unit number	Ofqual unit accreditation number	Unit title	Level	Credit	GLH	Group	*Excluded combination	Unit selected?
215	F/600/9469	Manage personal development	2	4	20	C		
216	H/600/9688	Participate in meetings	2	2	10	C		
217	H/600/9724	Communicate information and knowledge	2	3	10	C		
302	R/502/8615	Obtaining and analysing sales-related information	3	4	24	C		
303	H/502/8618	Obtaining and analysing competitor information	3	3	18	C		
304	K/502/8622	Buyer behaviour in sales situations	3	3	27	C		
305	T/502/8624	Communicating using digital marketing/sales channels	3	4	26	C		

2 Centre requirements

Approval

If your Centre is approved to offer the qualification Level 2 NVQ in Sales (6770-01) you will have automatic approval for the new Level 2 NVQ Certificate/Diploma in Sales (QCF) (6801-01/02).

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

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

Resource requirements

Centre staffing

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

- be occupationally competent to make Sales assessment judgements about the level and scope of individual candidate performance at work or in RWEs; and, occupationally competent to make assessment judgements about the quality of assessment and the assessment process
- be occupationally knowledgeable in the area(s) for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- have credible experience of providing training.

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

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

Assessors and internal verifiers

- Centre staff should hold, or be working towards, the relevant D/A/V/T or equivalent in Scotland for their role in delivering, assessing and verifying these qualifications

or

- A trainer, supervisor or manager, employed by an organisation must either:

1. hold or be working towards, the relevant D/A/V/T or equivalent in Scotland for their role in delivering, assessing and verifying these qualifications

or

2. seek guidance and approval from City & Guilds to demonstrate that
   - the organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
   - the trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100 per cent to the NOS upon which the qualifications above are based.

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

Continuing professional development (CPD)

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

Candidate entry requirements

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

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

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

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

Realistic work environments

Where the learner is subjected to a work environment and is producing performance evidence subject to all of the following conditions:
- time pressures
- work problems
- interruptions
- accountabilities
- office environment
- tools to do the job.

eg a candidate in a model or virtual office.

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

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

Simulation

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

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

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

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

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

Age restrictions

These qualifications are approved for candidates aged 14 years or over.

3   Delivering the qualification

Initial assessment and induction

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

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

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

Recording documents

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

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

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

Recording forms are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by learners and assessors at the centre.

Amendable (MS Word) versions of the forms are available on the City & Guilds website.

4   Assessment

Assessment of the qualification

Candidates must:
- have a completed portfolio of evidence across all the units. This can via a number of formats eg e-portfolio, recording forms etc.

Time constraints

The following must be applied to the assessment of this qualification:
- Candidates must finish their qualification within the candidate's period of registration.

Recognition of prior learning (RPL)

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

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

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

5 Units

Availability of units

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

Structure of units

These units each have the following:

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

Summary of units

Unit number	Unit title	Credits	QCF unit number (UAN)
201	Time planning in sales	2	F/502/8559
202	Complying with legal, regulatory and ethical requirements in a sales or marketing role	2	A/502/8561
203	Selling face to face	4	L/502/8564
204	Selling by telephone – inbound	4	J/502/8577
205	Selling by telephone – outbound	4	J/502/8580
206	Inputting and accessing sales or marketing data in information systems	2	D/502/8584
207	Processing sales orders	2	M/502/8587
208	Preparing and delivering a sales demonstration	3	T/502/8588
209	Selling at exhibitions	5	J/502/8594
210	Monitoring sales deliveries	2	L/502/8595

Unit number	Unit title	Credits	QCF unit number (UAN)
211	Supporting customers in obtaining finance for purchases	3	Y/502/8597
212	Generating and qualifying sales leads	2	H/502/8599
213	Meeting customers' after sales needs	3	R/502/8601
214	Deliver reliable customer service	5	J/601/1210
215	Manage personal development	4	F/600/9469
216	Participate in meetings	2	H/600/9688
217	Communicate information and knowledge	3	H/600/9724
302	Obtaining and analysing sales-related information	4	R/502/8615
303	Obtaining and analysing competitor information	3	H/502/8618
304	Buyer behaviour in sales situations	3	K/502/8622
305	Communicating using digital marketing/sales channels	4	T/502/8624

Unit 201   Time planning in sales

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

Learning outcome	The learner will:
1. Understand how to manage and prioritise time in a sales role	
Assessment criteria	
The learner can: 1.1 Explain the importance of time management and its impact on sales objectives 1.2 Describe how a sales team member uses and measures the use of time 1.3 Describe best practice time management techniques 1.4 Explain how to review the use of time spent on sales activities	

Learning outcome	The learner will:
2. Be able to plan own time in a sales role	
Assessment criteria	
The learner can: 2.1 Identify own long-term sales commitments and immediate goals 2.2 Identify work-related priorities 2.3 Identify the differences between tasks that are urgent and tasks that are important 2.4 Consolidate tasks to reduce workload and time wastage 2.5 Identify opportunities to gain support from others to complete work 2.6 Develop a time plan or weekly schedule, prioritising all tasks in order of relative importance and urgency	

Learning outcome	The learner will:
3. Be able to evaluate time planning in a sales role	
Assessment criteria	
The learner can: 3.1 Identify unnecessary tasks that are not directly related to own objectives 3.2 Use feedback from colleagues to identify strengths and weaknesses in the use of own time 3.3 Identify productive periods of time 3.4 Identify the opportunities for improving the use of time	

Unit 202   Complying with legal, regulatory and ethical requirements in a sales or marketing role

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

Learning outcome	The learner will:
1. Understand the legal, regulatory and ethical requirements in a sales or marketing role	
Assessment criteria	
The learner can: 1.1 Explain the legal requirements of a sales or marketing role 1.2 Explain the regulatory requirements of a sales or marketing role 1.3 Explain the ethical requirements of a sales or marketing role 1.4 State organisational procedures for raising legal, regulatory and ethical concerns relating to a sales or marketing role 1.5 Identify to whom non-compliance issues should be referred 1.6 Explain when and how to refer legal, regulatory and ethical concerns to others 1.7 Describe the possible consequence of non-compliance with legal, regulatory or ethical requirements	

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

Assessment criteria
The learner can:
2.1   Behave in a way that meets organisational ethical procedures, policies and standards
2.2   Identify areas where legal, regulatory or ethical issues may arise
2.3   Obtain advice on matters where legal, regulatory or ethical issues might exist
2.4   Work within the limits of responsibility and authority in a sales or marketing role
2.5   Report issues, problems and actions relating to legal, regulatory or ethical matters in the agreed format

Unit 203   Selling face to face

UAN:	L/502/8564
Level:	Level 2
Credit value:	4
GLH:	25
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS72 Sell products or services face-to-face.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to develop the knowledge and skills of selling to customers face to face, overcoming objections and closing the sale.

Learning outcome	The learner will:
1. Understand how to sell to customers face to face	
Assessment criteria	
The learner can:	

1.1 Explain the differences between proactive and reactive selling
1.2 Explain how techniques such as cross-selling, up-selling and the sale of add-ons can be applied when selling in face to face situations
1.3 Describe the types of listening and questioning techniques used for selling in face to face situations
1.4 Explain how to interpret non-verbal behaviour in face to face sales situations
1.5 State the differences between benefits and features
1.6 Describe the different methods used to sell benefits
1.7 Explain how to involve the prospect in reaching solutions to sales problems

Learning outcome	The learner will:
2. Be able to prepare for the sale	
Assessment criteria	
The learner can:	

2.1 Develop a structured sales plan for the meeting that makes effective use of the time available
2.2 Select resources to be used during contact with the customer that are consistent with the plan

Learning outcome	The learner will:
3. Be able to conduct a face to face sales meeting with the customer	

Assessment criteria
The learner can:
3.1 Follow organisational standards of personal presentation when meeting customers
3.2 Work within social and cultural constraints relating to the sector/industry and/or customer
3.3 Behave in a way that is likely to develop a rapport with the customer
3.4 Identify customer requirements through the use of questioning and active listening
3.5 Confirm customer requirements by summarising their buying needs and interests
3.6 Identify products and/or services which match the customer's needs and confirm with the customer that they are suitable
3.7 Communicate unique selling points to the customer
3.8 Provide the customer with opportunities to discuss and assess features and benefits of products and/or services
3.9 Interpret buying signals and act on them to progress the sale
3.10 Provide the customer with materials to support the promotion of products and/or services

Learning outcome	The learner will:
4. Be able to deal with sales objections during face to face sales situations	

Assessment criteria
The learner can:
4.1 Identify sales objections prior to dealing with the customer
4.2 Clarify objections and identify potential sales opportunities from them
4.3 Evaluate potential trade-offs that will be mutually beneficial to the customer and to the organisation
4.4 Record any area in which the product and/or service does not meet the customer's requirements
4.5 Resolve customer queries about the product and/or service
4.6 Reassure the customer and confirm their objections have been overcome

Learning outcome	The learner will:
5. Be able to close the sale	

Assessment criteria
The learner can:
5.1 Perform a trial close to establish whether or not further objections exist
5.2 Gain a commitment from the customer to close the sale
5.3 Complete the formalities of the sale following organisational procedures

Unit 204 Selling by telephone – inbound

UAN:	J/502/8577
Level:	Level 2
Credit value:	4
GLH:	27
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS73 Sell products or services over the telephone.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the skills necessary for responding to inbound sales calls.

Learning outcome	The learner will:
1. Understand how to sell by telephone (inbound)	
Assessment criteria	
The learner can:	

The learner can:
1.1 Describe the advantages and disadvantages of selling by inbound telephone sales calls
1.2 Describe when the following techniques can be applied when selling by inbound telephone sales calls: cross-selling, up-selling and selling add-ons
1.3 Describe the listening and questioning techniques used for selling during inbound telephone sales calls
1.4 Describe the different methods used to sell benefits during inbound telephone sales calls

Learning outcome	The learner will:
2. Understand how to close the sale during inbound telephone sales calls	
Assessment criteria	

The learner can:
2.1 Explain how to manage customer behaviour during inbound telephone sales calls
2.2 Describe methods for closing sales during inbound telephone sales calls
2.3 Explain how to evaluate and measure the success of inbound telephone sales calls

2.4	Describe interactive ICT options available to support telephone sales activities

Learning outcome	The learner will:
3. Be able to prepare for the inbound telephone sales call	
Assessment criteria	
The learner can:	
3.1 Identify objectives for selling products and/or services by inbound telephone sales calls	
3.2 Organise materials for a call in accordance with the sales call plan	

Learning outcome	The learner will:
4. Be able to identify customer needs during inbound telephone sales calls	
Assessment criteria	
The learner can:	
4.1 Greet and respond to callers in accordance with organisational procedures	
4.2 Obtain information from customers about their needs	
4.3 Assess the potential value of calls and customers	
4.4 Identify products and/or services with features and functions that customers need or want	
4.5 Identify opportunities for further sales and/or sales of other products and/or services	

Learning outcome	The learner will:
5. Be able to present products and/or services to the customer during inbound telephone sales calls	
Assessment criteria	
The learner can:	
5.1 Explain the benefits and features of products and/or services offered	
5.2 Interpret the customer's reaction and decide how to progress the sale	

Learning outcome	The learner will:
6. Be able to deal with sales objections during inbound telephone sales calls	
Assessment criteria	
The learner can:	
6.1 Identify sales objections prior to dealing with the customer	
6.2 Clarify objections and identify potential sales opportunities from them	
6.3 Deal with customer queries and objections with clear and accurate responses	
6.4 Resolve customer queries about the product and/or service	
6.5 Reassure the customer to confirm their objections have been overcome	
6.6 Develop a positive relationship with the customer and identify and	

pursue further customer contact

Learning outcome	The learner will:
7. Be able to close the sale during inbound telephone sales calls	
Assessment criteria	
The learner can: 7.1 Perform a trial close to establish whether or not further objections exist 7.2 Gain commitment from the customer to close the sale 7.3 Complete the formalities of the sale following organisational procedures 7.4 Provide customer feedback and reaction to products and/or services to appropriate people in own organisation	

Guidance note
This unit can not be taken with unit 205.

Unit 205 Selling by telephone – outbound

UAN:	J/502/8580
Level:	Level 2
Credit value:	4
GLH:	27
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS73 Sell products or services over the telephone.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the skills necessary for conducting outbound sales calls.

Learning outcome	The learner will:
1. Understand how to sell by telephone (outbound)	
Assessment criteria	

The learner can:
1.1 Describe the advantages and disadvantages of selling by outbound telephone sales calls
1.2 Describe when the following techniques can be applied when selling by outbound telephone sales calls: cross-selling, up-selling and selling add-ons
1.3 Describe the listening and questioning techniques used for selling during outbound telephone sales calls
1.4 Describe the different methods used to sell benefits during outbound telephone sales calls

Learning outcome	The learner will:
2. Understand how to close the sale during outbound telephone sales calls	
Assessment criteria	

The learner can:
2.1 Explain how to manage customer behaviour during outbound telephone sales calls
2.2 Describe methods for closing sales during outbound telephone sales calls
2.3 Explain how to evaluate and measure the success of outbound telephone sales calls

2.4	Describe interactive ICT options available to support telephone sales activities

Learning outcome	The learner will:
3. Be able to prepare for the inbound telephone sales call	
Assessment criteria	
The learner can:	

3.1 Identify objectives for selling products and/or services by outbound telephone sales calls

3.2 Use agreed call lists or leads to plan sales calls

3.3 Organise materials for the call in accordance with the sales call plan

Learning outcome	The learner will:
4. Be able to identify customer needs during outbound telephone sales calls	
Assessment criteria	
The learner can:	

4.1 Assess the potential value of calls and customers

4.2 Prioritise calls according to likely customer value and probability of closure

4.3 Obtain information from customers about their needs

4.4 Identify products and/or services with features and functions that customers need or want

4.5 Identify opportunities for further sales and/or sales of other products and/or services

Learning outcome	The learner will:
5. Be able to present products and/or services to the customer during outbound telephone sales calls	
Assessment criteria	
The learner can:	

5.1 Explain the benefits and features of products and or services offered

5.2 Interpret the customer's preferred solution and decide how to progress the sale

Learning outcome	The learner will:
6. Be able to deal with sales objections during outbound telephone sales calls	
Assessment criteria	
The learner can:	

6.1 Identify likely sales objections prior to dealing with the customer

6.2 Clarify objections and identify potential sales opportunities from them

6.3 Deal with customer queries and objections with clear and accurate responses

6.4 Resolve customer queries about the product and/or service

6.5 Reassure the customer to confirm their objections have been overcome

6.6	Develop a positive relationship with customers and identify and pursue further customer contact

Learning outcome	The learner will:
7. Be able to close the sale during outbound telephone sales calls	

Assessment criteria

The learner can:

7.1 Perform a trial close to establish whether or not further objections exist

7.2 Gain a commitment from the customer

7.3 Complete the formalities of the sale following organisational procedures

7.4 Provide customer feedback and reaction to products or services to appropriate people in own organisation

Guidance note

This unit can not be taken with unit 204.

Unit 206   Inputting and accessing sales or marketing data in information systems

UAN:	D/502/8584
Level:	Level 2
Credit value:	2
GLH:	15
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS81 Input and access data in your organisation's information systems.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the skills and knowledge required to input and access sales or marketing data and information.

Learning outcome	The learner will:
1. Understand how to input and access sales or marketing data in information systems	
Assessment criteria	
The learner can: 1.1 Explain the uses of IT in the sales or marketing function 1.2 Identify why information is needed for sales or marketing activities 1.3 Describe how sufficient, valid and reliable sources of sales or marketing information can be gathered 1.4 Explain the reasons for using an established data storage system 1.5 Describe the role, advantages and disadvantages of manual and computerised systems 1.6 Explain ways of classifying sales or marketing information and the protocol for data storage	

Learning outcome	The learner will:
2. Understand the use of sales or marketing information sources and systems	
Assessment criteria	
The learner can: 2.1 Explain methods of presenting sales or marketing information	

2.2	Describe the features of software and hardware used to manage sales or marketing information
2.3	Describe how to plan and organise searches for sales or marketing information
2.4	Explain the implications of entering incorrect sales or marketing data
2.5	Explain why certain types of sales or marketing information are confidential
2.6	Explain the scope of own authority and responsibility when using sales or marketing information and databases
2.7	Explain the actions to be taken in the case of a breach of confidentiality

Learning outcome	The learner will:
3. Be able to input and use databases to support sales or marketing activities	
Assessment criteria	

The learner can:

3.1	Gather sales or marketing information
3.2	Identify potential information sources that are likely to support planned sales or marketing activities
3.3	Follow organisational procedures to report concerns about security/confidentiality
3.4	Use sales information gathered to support specified sales or marketing activities
3.5	Input and update sales or marketing information on the database so that it can be accessed and used to support sales activities in the future

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Unit 207   Processing sales orders

UAN:	M/502/8587
Level:	Level 2
Credit value:	2
GLH:	17
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS83 Process customer orders and payments.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	The aim of this unit is to provide the skill and knowledge needed to process orders and payments.

Learning outcome	The learner will:
1. Understand how to process and follow up sales orders	
Assessment criteria	
The learner can: 1.1 Explain the importance of sales order processing 1.2 Describe organisational processes for ordering products and/or services 1.3 Describe different sources of information used to check customer credit 1.4 Describe the different payment methods accepted by sales orientated organisations 1.5 Explain the role of the despatch function 1.6 Describe service standards relating to sales order completion 1.7 Explain the importance of storing information securely	

Learning outcome	The learner will:
2. Be able to process sales orders	
Assessment criteria	
The learner can: 2.1 Identify customer sales order requirements 2.2 Check that the credit status of the customer meets organisational standards 2.3 Confirm the availability of products and/or services to the customer 2.4 Ensure that information given to the customer about delivery,	

	timing and price is accurate
2.5	Ensure that the sale is authorised following the organisation's procedures
2.6	Finalise the transaction in accordance with organisational procedures
2.7	Ensure that the customer is aware of the terms and conditions of sale
2.8	Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders
2.9	Identify who to go to when in need of support with sales order processing problems

Learning outcome	The learner will:
3. Be able to follow up sales order processing	
Assessment criteria	
The learner can:	
3.1 Keep the customer informed of the sales order progress and any problems with the sale order	
3.2 Advise the customer of current discounts and special offers	
3.3 Check all information is stored securely	

Unit 208 Preparing and delivering a sales demonstration

UAN:	T/502/8588
Level:	Level 2
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS64 Undertake sales demonstrations.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	The aim of this unit is to prepare for and provide creative, professional and inspiring demonstrations of their organisation's products or services to customers.

Learning outcome	The learner will:
1. Understand how to prepare and deliver a sales demonstration	

Assessment criteria
The learner can:
1.1   Explain how the demonstration will contribute to the achievement of business goals and objectives
1.2   Describe the features and benefits of the products and services being demonstrated
1.3   Explain how to provide demonstrations of products and services in a manner and style which is suitable to different audiences
1.4   Explain the importance of rehearsing demonstrations
1.5   Describe equipment and accommodation requirements of the demonstration

Learning outcome	The learner will:
2. Be able to prepare for a sales demonstration	

Assessment criteria
The learner can:
2.1   Identify the sales targets for own area of responsibility
2.2   Identify customer needs and wants in relation to the products and/or services being demonstrated
2.3   Agree the objectives, length, content and method of the

demonstration and who will be present

2.4   Identify resources for the demonstration and plan the demonstration in a structured way

2.5   Anticipate problems, constraints or objections that could be raised in response to the demonstration and prepare possible responses

2.6   Prepare supporting materials that are consistent with the demonstration

Learning outcome	The learner will:
3. Be able to deliver a sales demonstration	
Assessment criteria	

The learner can:

3.1   Promote the features and benefits of the products and/or services

3.2   Deliver the demonstration in a style and manner that achieves the objectives and engages the audience

3.3   Provide the customer/audience with opportunities to ask questions and raise objections

3.4   Respond to questions and objections in a manner that is likely to further sales

3.5   Gain commitment to progress or close the sale

Learning outcome	The learner will:
4. Be able to evaluate the sales demonstration	
Assessment criteria	

The learner can:

4.1   Evaluate the sales demonstration against agreed objectives

4.2   Provide feedback to colleagues to improve the planning of future demonstrations and/or to enhance products and/or services

Unit 209   Selling at exhibitions

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

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

The learner can:

1.1 Explain the purpose of exhibitions, trade fairs and conferences and how they produce sales opportunities

1.2 Identify which events are most appropriate to the industry/sector and organisation and explain why

1.3 Explain the importance of the sales event to achieving organisational plans and targets

1.4 Describe how to evaluate sales events and measure their overall success

Learning outcome	The learner will:
2. Understand how to prepare for and sell at exhibitions	
Assessment criteria	

The learner can:

2.1 Describe how to prepare for exhibitions

2.2 Explain the advantages and disadvantages of different methods and processes for collecting and recording sales leads information

2.3 Explain the importance of following up leads after the event

Learning outcome	The learner will:
3. Be able to prepare for an exhibition	

Assessment criteria

The learner can:

3.1 Identify the targets for sales and potential sales during the exhibition or trade fair

3.2 Provide information about the event that is attractive to customers

3.3 Agree procedures for collecting names, addresses and business cards of potential customers attending the event

3.4 Identify the dress code for the event

3.5 Obtain up to date product literature and prices lists

3.6 Collect customer testimonials and case studies to support sales messages, for use at the event

3.7 Identify target prospects from exhibition delegate lists

3.8 Review other exhibitors before the event to determine whether own organisation's products or services complement or compete with other products or services

3.9 Identify areas of compatibility and joint opportunities for the sale of add-ons, up selling or cross selling with other exhibitors before the event

Learning outcome	The learner will:
4. Be able to sell at an exhibition	

Assessment criteria

The learner can:

4.1 Use verbal and non-verbal communication to attract and engage the target audience

4.2 Find quick ways to establish customers' needs and wants

4.3 Identify up-selling and cross-selling opportunities

4.4 Gain commitment for sales or follow-up meetings after the event

4.5 Make appointments for follow-up meetings, ensuring that the right people are available for that meeting

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

Assessment criteria

The learner can:

5.1 Evaluate the effectiveness of the organisation's, personal and team's sales approach at the event

5.2 Provide feedback to colleagues to improve the planning for future events and/or to enhance products and/or services

Unit 210   Monitoring sales deliveries

UAN:	L/502/8595
Level:	Level 2
Credit value:	2
GLH:	10
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS84 Monitor the delivery of products.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge and skills needed when preparing for despatch and delivery of products to customers.

Learning outcome	The learner will:
1. Understand how to deal with sales delivery problems and queries	
Assessment criteria	
The learner can: 1.1 Explain how to deal with sales delivery problems and queries 1.2 Explain when to refer sales delivery problems and queries to someone with more authority 1.3 Describe own limits of responsibility and authority when dealing with sales delivery problems and queries	

Learning outcome	The learner will:
2. Understand how to maximise sales opportunities when dealing with sales deliveries and handovers	
Assessment criteria	
The learner can: 2.1 Explain how further sales opportunities can be identified and maximised 2.2 Identify the types of sales opportunities that may be identified at the point of handover 2.3 Explain how information on further sales opportunities should be used	

Learning outcome	The learner will:
3. Be able to progress delivery of the sales order	

Assessment criteria
The learner can:
3.1   Ensure the information on the sales order form matches internal documentation
3.2   Confirm that products are available for despatch
3.3   Confirm that the products are ready for handover to the customer in accordance with the terms and conditions of sale and organisational policy
3.4   Make changes to the sales order if required, ensuring customer expectations are met
3.5   Prepare accurate and complete documentation and records for handover
3.6   Record information according to organisation's procedures

Learning outcome	The learner will:
4. Be able to complete sales delivery procedures	
Assessment criteria	
The learner can:	
4.1 Confirm that the products are handed over to the customer in accordance with the sales agreement and terms and conditions of sale	
4.2 Confirm that the customer is satisfied with the products	
4.3 Follow up further opportunities for up-selling, cross-selling and selling add-ons.	

Unit 211　Supporting customers in obtaining finance for purchases

UAN:	Y/502/8597
Level:	Level 2
Credit value:	3
GLH:	22
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS82 Assist customers to obtain finance for purchases.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	The aim of this unit is to develop knowledge, understanding and skills in assisting customers to obtain finance to buy products and/or services.

Learning outcome	The learner will:
1. Understand the conditions for obtaining finance for purchases	
Assessment criteria	
The learner can:	

1.1 Describe the advantages and disadvantages of methods used for raising finance for purchases

1.2 Identify the organisation's preferred supplier of financial packages and associated arrangements

1.3 Identify 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

Learning outcome	The learner will:
2. Be able to recommend financial packages to customers for purchases	
Assessment criteria	
The learner can:	

2.1 Calculate the amount needed by the customer in accordance with organisational procedures

2.2	Gather sufficient information to enable the application for finance to proceed
2.3	Confirm the suitability of the financial package as meeting the customer's needs
2.4	Inform the customer of the terms and conditions applicable to the financial package selected
2.5	Provide the customer with the opportunity to raise questions or concerns
2.6	Provide written proposals for a financial agreement

Learning outcome	The learner will:
3. Be able to confirm customers' credit status	
Assessment criteria	
The learner can:	
3.1 Carry out a credit check prior to confirming finance to the customer in accordance with organisational procedures	
3.2 Communicate the outcome of credit searches and financial decisions to customers following organisatonal guidelines	
3.3 Complete financial documentation in compliance with legal and regulatory requirements	

Unit 212   Generating and qualifying sales leads

UAN:	H/502/8599
Level:	Level 2
Credit value:	2
GLH:	15
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS71 Generate and follow up sales leads.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the skills and knowledge needed to generate and qualify sales leads.

Learning outcome	The learner will:
1. Understand the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads	

Assessment criteria
The learner can:
1.1   Describe the organisational practices for acquiring contact lists and databases
1.2   Describe the practices relating to the sharing of customer information across the organisation
1.3   Identify the legislation and regulation relating to generating and qualifying sales leads
1.4   Explain the ethical codes of conduct relating to the generating and qualifying of leads

Learning outcome	The learner will:
2. Understand the process of generating and qualifying sales leads	

Assessment criteria
The learner can:
2.1   Explain how customers are segmented
2.2   Explain why and when different methods of contacting a prospect should be used
2.3   Explain how to identify and access key decision makers
2.4   Explain the importance of establishing buying needs and the

	contact's attitude to buying
2.5	Explain how the information provided by customers is assessed for potential up selling and cross selling
2.6	Explain how to identify customers who have high order value potential or up selling and cross selling opportunities

Learning outcome	The learner will:
3. Be able to prospect for customers	
Assessment criteria	
The learner can:	
3.1	Identify the target market customers and prospects according to the agreed criteria
3.2	Source and gather market and prospect information according to the agreed criteria
3.3	Qualify the sales contact according to the agreed criteria
3.4	Record details of sales contact in accordance with organisational procedures

Unit 213   Meeting customers' after sales needs

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

Learning outcome	The learner will:
1. Be able to investigate customer after sales needs	
Assessment criteria	
The learner can: 1.1 Establish the nature of customers' after sales needs 1.2 Communicate with customers in a way that conforms with quality and customer service standards at all times	

Learning outcome	The learner will:
2. Be able to handle customers' after sales needs	
Assessment criteria	
The learner can: 2.1 Deal with customers' after sales needs following organisational customer service standards and procedures 2.2 Balance customers' needs with those of the organisation 2.3 Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority 2.4 Fulfil commitments made to customers in accordance with quality and customer service standards 2.5 Record commitments made to customers	

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

Unit 214   Deliver reliable customer service

UAN:	J/601/1210
Level:	Level 2
Credit value:	5
GLH:	33
Relationship to NOS:	This unit is linked to Council for Administration Customer Service NOS: Unit B2 Deliver reliable customer service.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about how the learner delivers consistent and reliable service to customers. As well as being good with people, the learner needs to work with their organisation's service systems to meet or exceed customer expectations. In the learners' job there will be many examples of how they combine their approach and behaviour with their organisation's systems. The learner will need to prepare for each transaction with a customer, deal with different types of customers in different circumstances and check that what they have done has met customer expectations. To meet this standard they have to deliver excellent customer service over and over again.

Learning outcome	The learner will:
1. Be able to prepare to deal with customers	
Assessment criteria	
The learner can: 1.1 Keep their knowledge of their organisation's services or products up-to-date 1.2 Ensure that the area they work in is tidy, safe and organised efficiently 1.3 Prepare and arrange everything they need to deal with customers before their shift or period of work commences	

Learning outcome	The learner will:
2. Be able to give consistent service to customers	

Assessment criteria
The learner can:
2.1 Make realistic customer service promises to customers
2.2 Ensure that their promises balance the needs of their customers and their organisation
2.3 Keep their promises to customers
2.4 Inform their customers if they cannot keep their promises due to unforeseen circumstances
2.5 Recognise when their customers' needs or expectations have changed and adapt their service to meet the new requirements
2.6 Keep their customers informed if delivery of the service needs to involve passing them on to another person or organisation

Learning outcome	The learner will:
3. Be able to check customer service delivery	

Assessment criteria
The learner can:
3.1 Check that the service they have given meets their customers' needs and expectations
3.2 Identify when they could have given better service to customers and how their service could have been improved
3.3 Share information with colleagues and service partners to maintain and improve their standards of service delivery.

Learning outcome	The learner will:
4. **https://rits.ofqual.gov.uk/Units/LearningOutcomes/Details/464255**Know how to deliver reliable customer service	

Assessment criteria
The learner can:
4.1 Describe their organisation's services or products
4.2 Explain their organisation's procedures and systems for delivering customer service
4.3 Describe methods or systems for measuring an organisation's effectiveness in delivering customer service
4.4 Explain their organisation's procedures and systems for checking service delivery
4.5 Explain their organisation's requirements for health and safety in their area of work

Unit 214   Deliver reliable customer service

Supporting information

Evidence requirements

Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 – February 2010)

You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

You must provide evidence that you have worked with different customers who have different needs and expectations.

You must provide evidence of delivering reliable customer service:
- a. during routine delivery of customer service
- b. during a busy time in your job
- c. during a quiet time in your job
- d. when people, systems or resources have let you down.

Unit 215   Manage personal development

UAN:	F/600/9469
Level:	Level 2
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to Council for Administration Management NOS: M&LA2 Manage your own resources and professional development.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about managing your personal development in order to achieve your work objectives and career goals. Learners will be able to identify gaps in their skills and knowledge allowing them to develop and plan their activities.

Learning outcome	The learner will:
1. Be able to identify and agree performance requirements of own work role.	
Assessment criteria	
The learner can: 1.1 Outline work role performance requirements with those they report to.	

Learning outcome	The learner will:
2. Be able to measure and progress against objectives.	
Assessment criteria	
The learner can: 2.1 Identify ways that progress will be measured against own work objectives.	

Learning outcome	The learner will:
3. Be able to identify gaps in skills and knowledge in own performance.	
Assessment criteria	
The learner can:	

3.1	Explain knowledge and skills required for own work role
3.2	Identify opportunities and resources available for personal development
3.3	Produce a development plan to address own needs and agree with line manager

Learning outcome	The learner will:
4. Be able to carry out and assess activities within own development plan.	
Assessment criteria	
The learner can:	
4.1 Plan activities in own development plan that address identified needs	
4.2 Collect feedback from colleagues on the result of development activities on own performance	
4.3 Assess the success of activities carried out as part of own development plan	

Unit 216   Participate in meetings

UAN:	H/600/9688
Level:	Level 2
Credit value:	2
GLH:	10
Relationship to NOS:	This unit is linked to Council for Administration Management NOS: M&LD12 Participate in meetings.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit is about participating in meetings in an active and constructive way.

Learning outcome	The learner will:
1. Be able to prepare for a meeting	
Assessment criteria	
The learner can: 1.1 Explain meeting objectives prior to the meeting 1.2 Identify own role and prepare as necessary	

Learning outcome	The learner will:
2. Be able to participate in a meeting	
Assessment criteria	
The learner can: 2.1 Contribute to meeting discussions using evidence to support own opinions 2.2 Acknowledge other viewpoints presented at a meeting 2.3 Seek clarification or confirmation of own understanding of outcomes	

Learning outcome	The learner will:
3. Be able to communicate information to relevant stakeholders	
Assessment criteria	
The learner can: 3.1 Communicate information from the meeting to those who have an interest, in line with any organisational protocol	

Unit 217 Communicate information and knowledge

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

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

Learning outcome	The learner will:
2. Be able to understand communication techniques and methods	
Assessment criteria	
The learner can: 2.1 Identify what techniques and methods can be used to communicate information and knowledge 2.2 Explain how to select the most appropriate technique and method	

Learning outcome	The learner will:
3. Be able to communicate information and knowledge using appropriate techniques and methods	
Assessment criteria	
The learner can: 3.1 Communicate to target audience using the appropriate techniques	

and methods

3.2 Explain how the target audience has received and understood the information communicated

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

Unit 302 Obtaining and analysing sales-related information

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

Learning outcome	The learner will:
1. Understand the uses of sales-related information	
Assessment criteria	
The learner can: 1.1 Explain the importance of up-to-date information for sales planning purposes 1.2 Explain the benefits and risks of using a range of information sources to support sales activities 1.3 Explain the limitations of sales-related information 1.4 Explain the importance of reviewing sales data requirements for current and future use	

Learning outcome	The learner will:
2. Understand how to use tools and methods to analyse sales-related information	
Assessment criteria	
The learner can: 2.1 Explain the advantages and disadvantages of different systems to gather sales-related information 2.2 Explain how to use different software packages for analysing and presenting sales-related information	

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

The learner can:

3.1 Specify the information needed to develop an understanding of customers, competitors and markets

3.2 Identify sources that are capable of providing the required information about the organisation's markets, customers and competitors

3.3 Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation

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

The learner can:

4.1 Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information

4.2 Define the information needs of the target audience for different types of sales-related information

4.3 Use the analytical protocols that are appropriate to the selected tools and methods

4.4 Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information

4.5 Validate the reliability and validity of the findings of the analysis

4.6 Provide sales-related information to the target audience within the agreed timescale and budget

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

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

The learner can:
1.1 Explain how and where to source information about competitors
1.2 Explain how to validate sourced information about competitors against recognised criteria
1.3 Describe the advantages and disadvantages of qualitative and quantitative methods for collecting competitor information

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

The learner can:
2.1 Explain the purpose of obtaining and analysing information about competitors
2.2 Explain organisational policy on the recording of competitor information
2.3 Identify criteria that can be used to compare organisations with their competitors
2.4 Explain how to assess the impact of competitor activity on organisations

Learning outcome	The learner will:
3. Be able to use competitor information for sales-related activities	
Assessment criteria	
The learner can: 3.1 Obtain and record information about competitors in ways that allow analysis to be undertaken 3.2 Identify competitors' objectives 3.3 Identify the nature of potentially threatening competitor activity 3.4 Estimate the relative importance of competitor activity on profitability and market share growth 3.5 Review the impact of competitor activity on sales activities 3.6 Propose sales activities in response to competitors' activities	

Unit 304   Buyer behaviour in sales situations

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

Learning outcome	The learner will:
1. Understand the impact of different models of buyer behaviour on the sales cycle	
Assessment criteria	
The learner can: 1.1 Explain the consumer buying decision-making process 1.2 Explain how the consumer buying decision-making process affects the sales cycle 1.3 Describe the influences that affect the consumer decision-making process 1.4 Explain the organisational buying decision-making process 1.5 Explain how the organisational buying decision-making process affects the sales cycle 1.6 Describe the influences that affect the organisational buying decision-making process 1.7 Explain the impact of the different roles within the decision-making unit on the sales cycle	

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

The learner can:

2.1 Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process

2.2 Respond to different decision-makers in a sales situation in a way that is appropriate to their role

2.3 Use objections as buying opportunities

2.4 Confirm solution(s) offered meet the needs and wants of decision-makers

Unit 305 Communicating using digital marketing/sales channels

UAN:	T/502/8624
Level:	Level 3
Credit value:	4
GLH:	26
Relationship to NOS:	This unit is linked to Council for Administration Sales NOS: SLS57 Communicate using multiple digital marketing and sales channels.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration, the standard setting organisation for business skills. For those assessment criteria which are performance related the most likely form of evidence is assessor observation.
Aim:	This unit aims to provide the knowledge and skills needed to carry out digital marketing via multiple channels using digital media which are both media and technology independent. These can therefore include, for example, email, SMS (Short Message Service or text messaging), RSS (Rich Text Syndication/Real Simple Syndication) websites, blogs and user-generated content.

Learning outcome	The learner will:
1. Understand how to plan the use of digital media for a specific message, audience and recipients	
Assessment criteria	
The learner can: 1.1 Explain the selection of the organisation's targeted customers 1.2 Describe expected target audience responses to different electronic media communication methods 1.3 Describe the characteristics, advantages and disadvantages of different software packages for presenting marketing information 1.4 Explain the requirements of using multiple digital marketing technologies	

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

The learner can:

2.1 Confirm the sales and marketing objectives for the digital communication, including response rates and sales generated return on investment

2.2 Identify the criteria to be used in selecting recipients in target audience

2.3 Source and acquire targeted lists and databases of recipients in accordance with the plan

2.4 Confirm the range of electronic media best suited to communicating to the target audience in line with the sales and marketing objectives

2.5 Agree with relevant people the marketing communications message designed to engage the customer and which is appropriate for the media selected

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

The learner can:

3.1 Check any links, keywords, and supporting attachments allow access by recipients to further information

3.2 Identify any risks that the message might be labelled as 'spam' and take action to minimise such risks

3.3 Enable click-through tracking in digital messages in accordance with the plan

3.4 Send messages to targeted customers in accordance with the plan

3.5 Set up reporting system for 'undeliverables' in accordance with organisational procedures

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

The learner can:

4.1 Record undelivered messages in accordance with reporting system

4.2 Identify repeat communications requirements in line with the sales and marketing objectives

4.3 Monitor and evaluate the responses to digital marketing against agreed criteria

4.4 Report the findings of the evaluation in accordance with organisational procedures

Appendix 1 Relationships to other qualifications

Links to other qualifications

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

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

These qualifications have connections to the:

- old Level 2 NVQ in Sales (6770-01)
- new 7712 & 7734 in Marketing
- new 4430 & 4417 in Customer Service
- new 3412 in Contact Centres

Literacy, language, numeracy and ICT skills development

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

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

Appendix 2 Sources of general information

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

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

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

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

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

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

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

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

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

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Skills for a brighter future

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Useful contacts

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

About City & Guilds

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

City & Guilds Group

The City & Guilds Group includes City & Guilds, ILM (the Institute of Leadership & Management, which provides management qualifications, learning materials and membership services), City & Guilds NPTC (which offers land-based qualifications and membership services), City & Guilds HAB (the Hospitality Awarding Body), and City & Guilds Centre for Skills Development. City & Guilds also manages the Engineering Council Examinations on behalf of the Engineering Council.

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