SPECIFICATION

IAO Level 2 NVQ Certificate in Sales
Qualification Number: 600/1901/3

Innovate Awarding is an Ofqual regulated awarding organisation with an innovative and dynamic approach. We develop off-the-shelf, customised and fully bespoke qualifications across a growing number of sectors – all on the Regulated Qualifications Framework (RQF).

Our portfolio is always growing and we currently have qualifications in the following sectors:

Active Leisure	**Health and Social Care**
Business and Management	**Hospitality and Catering**
Childcare	**IT**
Employability	**Logistics**
Retail	**Education and Training**

We currently offer over 100 qualifications and we're continuously developing and diversifying our portfolio. Please visit our website regularly to keep up-to-date www.innovateawarding.org

This document will be updated if there are any changes so it is important to make sure you are working from the most up-to-date version, which is available to download from our website

This specification also provides details on administration, quality assurance policies and the requirements as well as responsibilities that are associated with the delivery of vocational qualifications.

Innovate Awarding is recognised as an awarding organisation by the qualifications regulator Ofqual (England).

If you have any questions regarding qualifications in general, aspects of specific qualifications or our quality assurance policies and procedures, visit our website where a lot more information is available.

If you cannot find what you are looking for on our website, please call or email our customer support team:

Telephone: 0117 314 2800
Email: contactus@innovateawarding.org

"We work with a wide variety of organisations such as employers, training providers, FE colleges and Sector Skills Councils and develop off-the-shelf, customised and bespoke qualifications."

Qualification summary

Qualification Accreditation Number (QAN)	600/1901/3
Qualification review date	31st March, 2021
Guided Learning Hours (GLH)	Minimum 124 hours
Total Qualification Time (TQT)	220 hours
RQF level	2
Qualification credit value	22 credits
Minimum credits at/above level	22 credits
Assessment requirements	Portfolio of Evidence This qualification is internally assessed and internally quality assured by Centre staff and externally quality assured by Innovate Awarding External Quality Advisors (EQAs).
Aims and objectives of the qualification	Level 2 NVQ Certificate in Sales (RQF) provides Learners with the essential skills and knowledge required to work in a sales-led environment. It is designed to meet the skills needs of employers of all sizes across the public, private and not- for-profit sectors and provides a solid foundation in sales theory, processes and sales techniques.
Entry guidance	There are no formal entry requirements for this qualification. This qualification is suitable for those who work in junior sales positions across a variety of sales related industries.
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. Roles may include competitor analysis, online sales, sales queries and supporting a field sales team or internal senior sales professionals. On completion of this qualification, Learners may progress to: • IAO Level 2 NVQ Diploma in Sales • IAO Level 3 Certificate in Principles of Sales • IAO Level 3 NVQ Certificate in Sales

Funding	For details on eligibility for government funding please refer to the following websites: http://www.education.gov.uk/section96 http://www.thedataservice.org.uk

Innovate Awarding

When you work with Innovate Awarding, you're working with an awarding organisation that sets itself apart – a dynamic company with a collaborative approach to doing business. We're consultative and innovative…everything that our customers say they want an awarding organisation to be.

We're easy to work with, committed and passionate about exceeding our customers' expectations. We're not tied down by bureaucracy and red tape and can think outside the box and respond quickly to our customers' needs.

We have a Performance Pledge that details guaranteed response times. Copies of these can be found on our website www.innovateawarding.org

Feedback

Your feedback is very important to us. We're always open to suggestions when it comes to enhancing and improving our services, products and systems. Email us at contactus@innovateawarding.org or call us on 0117 314 2800.

Complaints

If we do get things wrong, we'll make every effort to resolve your issues quickly and efficiently. If you'd like to raise a formal complaint then we recommend you read our Complaints Procedure which can be found on our website.

Fees

Our fees structure is transparent and straightforward. Our fees are published on our website in a clear format with no hidden charges. Unlike other awarding organisations, we do not charge an annual centre fee. Visit our website to compare our fees.

Enquiries and Appeals

We recognise that sometimes decisions are made that a centre (or learner) may wish to appeal. We have an Enquiries and Appeals Policy and Process on our website that sets out guidelines on grounds for appeal and the process.

Data Protection

Innovate Awarding takes the protection of data seriously; we have a data protection statement outlining how we and our centres, comply with the current legislation on data protection. This statement can be found on our website.

Equality and Diversity

Innovate Awarding is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation (Equality Act 2010) and EU directives.

Centres are required, as conditions of approval, to use an equality and diversity policy that works together with ours and that they maintain an effective complaint and appeals process. We expect centres to tell learners how to find and use their own equality and diversity and appeals processes. For information, please visit our website.

Reasonable Adjustment and Special Consideration

All learners must be treated fairly and equally and be given every opportunity to achieve our/the qualifications. A copy of our policy on Reasonable Adjustments and Special Considerations, and application form, can be found on our website.

Malpractice and Maladministration

Innovate Awarding has a responsibility to do everything it can to prevent any malpractice or maladministration from occurring, and where it has already occurred, ensuring action is taken proportionate to the gravity and scope of the occurrence.

A copy of our policy and procedure on Malpractice and Maladministration is available on our website.

Recognition of Prior Learning (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification or unit. Innovate Awarding have produced guidance on RPL and this can be found within our Information and Guidance for Centres on our website.

Please note the above is not a comprehensive guide to running IAO qualifications. Once approved centres must adhere to the Centre Agreement and Information and Guidance for Centres.

The Regulated Qualifications Framework (RQF)

What is the RQF?

The Regulated Qualifications Framework (RQF) is an Ofqual regulated system of cataloguing qualifications. Qualifications on the RQF can be found by their size or level. Qualifications at a given level can differ depending on their content and purpose.

All of Innovate Awarding's qualifications are on the RQF.

Qualification Level

The level reflects the challenge or difficulty of the qualification. There are eight levels of qualification from 1 to 8, supported by three "Entry" levels.

Qualification Size

The size of a qualification reflects the estimated total amount of time it would take the average learner to study and be assessed. The size of a qualification is expressed in terms of Total Qualification Time (TQT). The time spent being taught or supervised, rather than studying alone, is the Guided Learning Hours (GLH).

Qualifications can sit at different levels, but require similar amounts of study and assessment. Similarly, qualifications at the same level can take different amounts of time to complete.

Skills CFA Assessment Strategy

1. Introduction

1.1 1. Introduction

1.1 The Sales Assessment Strategy is designed to provide awarding organisations with a robust and flexible approach to deliver assessment for Sales NVQs /SVQs and competence-based qualifications.

2. External quality control

2.1 Awarding organisations will provide qualifications and quality assurance that support their delivery to all Sales NVQs /SVQs and competence-based qualification assessment centres in line with regulatory requirements in England, Scotland, Wales and Northern Ireland.

2.2 Awarding organisations must use independent assessment1 for NVQs /SVQs and competence based qualifications.

2.3 Awarding organisations will supply the CfA: Business Skills @ Work (CfA) with reports:

- Quarterly: provide registration and achievement data at unit and qualification levels

3. Assessing performance

3.1 Assessment of all units at any level of Sales NVQs / SVQs and competence-based qualifications may be based on either candidate performance at work or through simulation, as necessary (See Section 4 below).

3.2 Units which have been imported by the CfA in their Sales NVQs / SVQs and competence-based qualifications will be assessed in compliance with their relevant assessment strategies.

4. Simulation of NVQ / SVQ units

4.1 If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE).

4.2 Awarding organisations will provide guidance for centres on RWEs. Awarding organisations will make sure RWEs, "provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed".

5. Occupational expertise to assess performance, and moderate and verify assessments

5.1 Candidates must be assessed, moderated or verified at work either by:

a. Assessors, moderators or verifiers who have achieved or are working towards achievement of the appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

b. A trainer, supervisor or manager, employed by an organisation, who must either:

1. Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; or,

2. Seek guidance and approval from an awarding organisation to demonstrate that the;

• Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions

• Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based, and the A and V units. This is known as the employer direct model in Scotland.

5.2 Assessors must 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.

5.3 External Moderators / Verifiers or Internal Moderators / Verifiers must be occupationally competent to make Sales moderation and verification judgements about the quality of assessment and the assessment process.

5.4 Awarding organisations will supply information on the requirements for internal and external moderation / verification activities to Sales assessment centres.

5.5 The sector requires all assessors, moderators and verifiers to maintain current Sales competence to deliver these functions. The CfA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Sales assessment centres.

Qualification structure

Learners must achieve 22 credits in total: 9 credits from Mandatory Units Group A and a minimum of 4 but maximum of 8 credits from Optional Group B and a minimum of 5 credits from Optional Group C.

The total Guided Learning Hours (GLH) for this qualification is 124 hours.

The Total Qualification Time (TQT) for this qualification is 220 hours.

Unit structures

Mandatory and optional units are listed below.

Mandatory units group A

Unit ref	Unit title	Level	Credit value	GLH
F/502/8559	Time planning in sales	2	2	13
A/502/8561	Complying with legal, regulatory and ethical requirements in a sales or marketing role	2	2	13
J/601/1210	Deliver reliable customer service	2	5	33

Optional units group B

Unit ref	Unit title	Level	Credit value	GLH
L/502/8564	Selling face to face	2	4	25
J/502/8577	Selling by telephone - inbound	2	4	27
J/502/8580	Selling by telephone – outbound	2	4	27

Optional units group C

Unit ref	Unit title	Level	Credit value	GLH
D/502/8584	Inputting and accessing sales or marketing data in information systems	2	2	15
M/502/8587	Processing sales orders	2	2	17
J/502/8594	Selling at exhibitions	2	5	28
T/502/8588	Preparing and delivering a sales demonstration	2	3	20
L/502/8595	Monitoring sales deliveries	2	2	10
Y/502/8597	Supporting customers in obtaining finance for purchases	2	3	22
H/502/8599	Generating and qualifying sales leads	2	2	15
R/502/8601	Meeting customers' after sales needs	2	3	14
R/502/8615	Obtaining and analysing sales-related information	3	4	24
H/502/8618	Obtaining and analysing competitor information	3	3	18
K/502/8622	Buyer behaviour in sales situations	3	3	27
T/502/8624	Communicating using digital marketing/sales channels	3	4	26
F/600/9469	Manage personal development	2	4	20
H/600/9688	Participate in meetings	2	2	10
H/600/9724	Communicate information and knowledge	2	3	10

Barred Units

Unit ref	Unit title
Selling by telephone – inbound (J/502/8577)	Selling by telephone – outbound (J/502/8580)

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	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
2. Be able to plan own time in a sales role	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
3. Be able to evaluate time planning in a sales role	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

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:	**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 about this unit 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/601/1210 Deliver reliable customer service
Level:	**2**
Credit Value:	**5**
GLH:	**33**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Prepare to deal with customers	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
2. Give consistent service to customers	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

3. Check customer service delivery	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.
4. Know how to deliver reliable customer service	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
Additional information about this unit N/A	
Unit aim (s)	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 Learner's job there will be many examples of how they combine their approach and behaviour with their organisation's systems. The Learner's 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.

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 B2 of the Customer Service NOS 2010

Title:	**L/502/8564 Selling face to face**
Level:	**2**
Credit Value:	**4**
GLH:	**25**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Understand how to sell to customers face to face	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
2. Be able to prepare for the sale	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

3. Be able to conduct a face to face sales meeting with the customer	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 3.11 Provide the customer with materials to support the promotion of products and/or services
4. Be able to deal with sales objections during face to face sales situations	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

5. Be able to close the sale	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
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills of selling to customers face to face, overcoming objections and closing 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:	J/502/8577 Selling by telephone (inbound)
Level:	2
Credit Value:	4
GLH:	27
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Understand how to sell by telephone (inbound)	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
2. Understand how to close the sale during inbound telephone sales calls	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
3. Be able to prepare for the inbound telephone sales call	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

4. Be able to identify customer needs during inbound telephone sales calls	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
5. Be able to present products and/or services to the customer during inbound telephone sales calls	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
6. Be able to deal with sales objections during inbound telephone sales calls	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
7. Be able to close the sale during inbound telephone sales calls	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
Additional information about this unit N/A	

Unit aim (s)	This unit aims to provide the skills necessary for responding to inbound sales calls.
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/502/8580 Selling by telephone (outbound)**
Level:	**2**
Credit Value:	**4**
GLH:	**27**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Understand how to sell by telephone (outbound)	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
2. Understand how to close the sale during outbound telephone sales calls	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
3. Be able to prepare for the outbound telephone sales call	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

4. Be able to identify customer needs during outbound telephone sales calls	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
5. Be able to present products and/or services to the customer during outbound telephone sales calls	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
6. Be able to deal with sales objections during outbound telephone sales calls	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
7. Be able to close the sale during outbound telephone sales calls	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

Additional information about this unit N/A	
Unit aim (s)	This unit aims to provide the skills necessary for conducting outbound sales calls
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/502/8584 Inputting and accessing sales or marketing data in information systems**
Level:	**2**
Credit Value:	**2**
GLH:	**15**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Understand how to input and access sales or marketing data in information systems	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
2. Understand the use of sales or marketing information sources and systems	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

3. Be able to input and use databases to support sales or marketing activities	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
Additional information about this unit N/A	
Unit aim (s)	This unit aims to provide the skills and knowledge required to input and access sales or marketing data and information.
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:	**M/502/8587 Processing sales orders**
Level:	**2**
Credit Value:	**2**
GLH:	**17**
Learning Outcomes The learner will:	**Assessment Criteria The learner can:**
1. Understand how to process and follow up sales orders	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
2. Be able to process sales orders	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
3. Be able to follow up sales order processing	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
Additional information about this unit N/A	
Unit aim (s)	The aim of this unit is to provide the skill and knowledge needed to process orders and payments
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	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
2. Understand how to prepare for and sell at exhibitions	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
3. Be able to prepare for an exhibition	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
4. Be able to sell at an exhibition	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
5. Be able to evaluate own performance at an exhibition	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
Additional information about this unit 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)

Title:	**T/502/8588 Preparing and delivering a sales demonstration**
Level:	**2**
Credit Value:	**3**
GLH:	**20**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Understand how to prepare and deliver a sales demonstration	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
2. Be able to prepare for a sales demonstration	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

3. Be able to deliver a sales demonstration	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
4. Be able to evaluate the sales demonstration	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
Additional information about this unit N/A	
Unit aim (s)	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.
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/502/8595 Monitoring sales deliveries**
Level:	**2**
Credit Value:	**2**
GLH:	**10**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Understand how to deal with sales delivery problems and queries	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
2. Understand how to maximise sales opportunities when dealing with sales deliveries and handovers	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
3. Be able to progress delivery of the sales order	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

4. Be able to complete sales delivery procedures	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
Additional information about this unit N/A	
Unit aim (s)	This unit aims to provide the knowledge and skills needed when preparing for despatch and delivery of products to 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:	**Y/502/8597 Supporting customers in obtaining finance for purchases**
Level:	**2**
Credit Value:	**3**
GLH:	**22**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Understand the conditions for obtaining finance for purchases	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
2. Be able to recommend financial packages to customers for purchases	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

3. Be able to confirm customers' credit status	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
Additional information about this unit N/A	
Unit aim (s)	The aim of this unit is to develop knowledge, understanding and skills in assisting customers to obtain finance to buy products and/or services
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/502/8599 Generating and qualifying sales leads**
Level:	**2**
Credit Value:	**2**
GLH:	**15**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Understand the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads	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
2. Understand the process of generating and qualifying sales leads	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
3. Be able to prospect for customers	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
Additional information about this unit N/A	
Unit aim (s)	This unit aims to provide the skills and knowledge needed to generate and qualify sales leads
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/502/8601 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 customers' after sales needs	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
2. Be able to handle customers' after sales needs	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
3. Be able to review the after sales process	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
Additional information about this unit 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:	**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	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
2. Understand how to use tools and methods to analyse sales- related information	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
3. Be able to obtain sales-related information about customers, markets and competitors	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
4. Be able to use tools and methods to analyse sales-related information	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
Additional information about this unit N/A	
Unit aim (s)	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
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	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
2. Understand the uses of competitor information for sales-related activities	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
3. Be able to use competitor information for sales-related activities	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

Additional information about this unit N/A	
Unit aim (s)	This unit is all about obtaining and analysing information to understand the impact of competitors on the organisation's sales activities
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/502/8622 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 about this unit 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:	**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	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	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

3. Be able to check the digital message can be accessed and/or delivered	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
4. Be able to monitor and evaluate the response to digital activity and take any corrective action	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
Additional information about this unit N/A	
Unit aim (s)	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.
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/600/9469 Manage personal development**
Level:	**2**
Credit Value:	**4**
GLH:	**20**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Be able to identify and agree performance requirements of own work role	1.1 Outline work role performance requirements with those they report to
2. Be able to measure and progress against objectives	2.1 Identify ways that progress will be measured against own work objectives
3. Be able to identify gaps in skills and knowledge in own performance	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
4. Be able to carry out and assess activities within own development plan	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
Additional information about this unit N/A	
Unit aim (s)	This unit will ensure that learners can identify and assess progress against performance requirements in own work 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	MSC A1 Manage your own resources

Title:	**H/600/9688 Participate in meetings**
Level:	**2**
Credit Value:	**2**
GLH:	**10**
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Be able to prepare for a meeting	1.1 Explain meeting objectives prior to the meeting 1.2 Identify own role and prepare as necessary
2. Be able to participate in a meeting	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
3. Be able to communicate information to stakeholders	3.1 Communicate information from the meeting to those who have an interest, in line with any organisational protocol
Additional information about this unit N/A	
Unit aim (s)	This unit will ensure that learners are able to prepare for, take part in and communicate information arising from 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	MSC D12 Participate in meetings

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 about this unit 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