Edexcel Level 2 NVQ in Sales - Guidance for Centres

Edexcel NVQ in Sales – Guidance for Centres
Issue: 1 – June 2009
Produced and authorised by: NVQ Assessment and Delivery Manager – Peter Jackson

Contents

Edexcel NVQ in Sales – Guidance for Centres
Issue: 1 – June 2009
Produced and authorised by: NVQ Assessment and Delivery Manager – Peter Jackson

About this guide

This guide provides information and guidance for the Edexcel NVQ in:

Title	Level	NVQ
Sales	**2**	**Q5000388**

Introduction

This introduction provides a brief overview of NVQs and how they are assessed in the workplace. If you are already familiar with the concept of NVQs, you may wish to go to the next section.

About NVQs

National Vocational Qualifications (NVQs) are work-based qualifications which set the level of occupational competence for each sector of the economy. The qualifications have been designed by standards-setting bodies made up of experienced practitioners who represent employers, professional bodies, trade unions, education and voluntary organisations.

Each standards-setting body is responsible for developing national standards which define *what* employees (or potential employees) must be able to do, *how well*, and *in what circumstances*, to show that they are competent in their work.

Each NVQ, which a standards-setting body develops, has to fit into a broad framework which allows qualifications in the UK and throughout Europe to be compared. NVQs are specified at five levels, which reflect the various technical and supervisory skills knowledge and experience, which employees should have as they progress in their industry.

Explanation of levels

Level 1 Defines competent performance in a range of activities, which are largely routine and predictable.

Level 2 Specifies that competent performance must be shown in a broader range of work activities which are less routine and predictable. The employee will have more autonomy and responsibility, and may have to work as part of a team.

Level 3 Specifies that competent performance must involve the employee in carrying out a broad range of varied work activities, most of which are complex and non-routine. There is considerable autonomy and responsibility, including the possibility of controlling or guiding others.

Level 4 Specifies competence as complex technical or professional work activities which require a substantial degree of personal autonomy or responsibility. Managing staff and other resources is often involved.

Level 5 Specifies competent performance as involving the employee in carrying out a significant range of activities in a wide variety of situations, which are often unpredictable. Substantial responsibility and autonomy is involved in the work, which requires decision-making in the allocation of resources and the work of others. This will require complex skills such as analysis, design and evaluation.

How are standards defined in NVQs?

All NVQs consist of standards that can be broken down into various parts.

Units define the broad functions carried out in the sector, and are made up of a number of Elements. These **Elements** describe the activities which employees have to perform, and will require candidates to demonstrate certain skills or knowledge and understanding.

The quality of performance in what people must be able to do — how well they have to perform — is described by **Performance Criteria**. These may also be called **statements of competence** or **what candidates should do**.

The section on **knowledge and understanding** says what candidates must know and understand, and how this knowledge applies to their jobs.

You may also come across standards containing statements on **scope**. These statements could, for example, list the equipment that candidates are expected to be familiar with and use in their occupational area.

Increasingly, you may see changes to this format as standards become more user-friendly and are written in plain English. For example, there may be some standards containing **Range Statements** or **Evidence Requirements**, but over time these should disappear. You may, however, find that information on the context, nature and amount of evidence which is required to prove competence (which used to be given in Range Statements and Evidence Requirements) is now defined in the **assessment guidance** for the qualification. Assessment guidance is drawn up by the awarding body and is packaged along with the standards to form the NVQ.

Who is involved in NVQs?

There are several roles:

- **the candidate:** the person who wants to achieve the NVQ (eg an employee)
- **the assessor:** the person who assesses the candidates and decides if they are competent (eg supervisor)
- **the internal verifier:** an individual nominated by the centre (eg a company) who ensures that assessors apply the standards uniformly and consistently (eg supervisor's line manager)
- **the external verifier:** an individual appointed by Edexcel who ensures that standards are being applied uniformly and consistently across all centres offering the NVQ

Assessors and verifiers in centres will be asked by Edexcel to prove they have the appropriate occupational competence to assess and verify the NVQ, as part of the Centre and Qualification Approval process. Any changes to these personnel should be reported to the EV allocated to the approved centre. Occupational competence has been defined by the standards-setting body in the assessment strategy for these NVQs. The standards setting body for Sales is the Marketing and Sales Standards Setting Body:

Marketing and Sales Standards Setting Body
Cookham
Maidenhead
SL6 9QH

Tel 01628 427106
Web www.msssb.org/

Assessors and verifiers are also expected to possess an appropriate qualification in assessment and verification, or to obtain the appropriate Assessor, A1, and Verifier, V1, Units.

The steps involved in assessing a candidate for an NVQ

In deciding whether a candidate should get an NVQ, you will go through these stages:

- planning for assessment
- generating and collecting evidence of the candidate's competence in the Units
- judging the evidence of the candidate's ability and making an assessment decision based on the evidence
- recording the assessment decision and the candidate's achievement

1 The Edexcel Level 2 NVQs in Sales

Qualification summary and structure of the NVQ:

The sales industry is constantly growing and thriving. The purpose of this qualification is to meet the needs of employers and training providers in the work based learning sector, within the sales industry.

This NVQ is for you if you work in the sales industry, and are pursuing a career in this area. It is ideal if you work a lot with customers.

Accreditation start date: 01/08/2008 Operational start date in centres: 01/08/2008

Accreditation end date: 31/12/2010

Certification end date: 31/12/2012

This NVQ provides various progression opportunities.

Candidates can progress onto the Edexcel Level 3 NVQ in Sales. It will also be possible to progress onto the Edexcel Level 3 BTEC National in Retail, or Business (Marketing).

This NVQ will also equip candidates with the transferable skills and knowledge necessary for progression in employment. Potential job occupations: Bank/Building Society Customer Adviser; IT Technical Sales Specialist; Retail Assistant; Sales Representative.

Qualification structure summary

Candidates must complete all units from group A, one unit from group B and three units from group C.
Group A - Mandatory Units

Manage and prioritise time for sales activities
Demonstrate compliance with legal, regulatory and ethical requirements for sales activities

Group B - Optional group 1

Sell products or services face-to-face
Sell products or services over the telephone

Group C - Optional group 2

Obtain and analyse sales-related information
Develop, implement and monitor sales call plans
Manage your own personal and professional development in sales
Sell products and services at trade fairs, exhibitions or conferences
Undertake sales demonstrations
Generate and follow up sales leads
Handle objections and close sales
Input and access data in your organisation's information systems
Assist customers to obtain finance for purchases
Process customer orders and payments
Monitor the delivery of products
Ensure health and safety requirements are met in your area of responsibility

2 The NVQ Assessment Strategy

MSSSB

Marketing and Sales
Standards Setting Body

Assessment Strategy for NVQs/SVQs

in Sales/Key Customer Management/Telesales

Draft version **December 2005**

Contents

Assessment Strategy for NVQs/SVQs in Sales/Key Customer Management/ Telesales

Introduction

The Marketing and Sales Standards Setting Body (MSSSB), is the Government approved national body tasked with setting standards of best practice for sales and key customer management.

Working with key stakeholders in this professional area, including employers (from the private, public and voluntary sectors), professional, trade and education bodies, the MSSSB has developed a suite of standards covering the activities undertaken by Sales/Key Customer Management professionals.

The standards are available to inform a range of applications, including the development of qualifications. The standards are also the basis for National Vocational Qualifications (NVQs), and Scottish Vocational Qualifications (SVQs) in Sales/Key Customer Management.

Purpose of the assessment strategy

This assessment strategy, and therefore the purpose of this document, sets out the overarching principles for the assessment of NVQs/SVQs in Sales/Key Customer Management. These principles complement the associated requirements of the regulatory bodies for NVQs/SVQs.

The primary audience for this document is awarding bodies wishing to offer NVQs/SVQs in Sales/Key Customer Management/Telesales. Centres delivering these NVQs/SVQs should also be aware of, and meet, the relevant requirements of this strategy. The assessment strategy should also be a requirement for other Standards Setting Bodies and awarding bodies that import the Sales/Key Customer Management/Telesales national occupational standards into NVQs/SVQs that are not designed primarily for sales professionals.

MSSSB believes that awarding bodies delivering the Sales/Telesales/ Key Customer Management NVQs/SVQs are responsible for providing quality assurance processes for the assessment of the standards within these NVQs/SVQs. The awarding bodies are in the best position to provide detailed assessment guidance and requirements regarding evidence of competence. Assessment should be effective without being burdensome, and suitably qualified and experienced assessors, internal verifiers and external verifiers must be allowed to apply their professional judgement, whilst ensuring that they comply with the assessment guidance and requirements regarding evidence in a consistent manner.

As above prospective, or approved centres offering NVQs/SVQs in Sales/Key Customer Management/Telesales, need to be aware of the requirements of this document. Indeed, they do need to see, and to work within the overall documentation, procedures and systems proposed by their chosen awarding body for operation of the NVQs/SVQs in Sales/Key Customer Management/Telesales.

This assessment strategy will be available for view and to download from the MSSSB website (www.msssb.org).

External quality control of assessment

Adherence to the national guidelines

The national guidelines prepared by the regulatory bodies set out quality assurance principles, and the MSSSB believes that these offer sufficient guidance to awarding bodies regarding the quality assurance and control of NVQs/SVQs in Sales/Key Customer Management/Telesales.

Should the MSSSB have concerns regarding the effectiveness of an awarding body, it has the right to raise such concerns with that body, and if necessary, with the regulatory authorities.

Risk management

An integral part of the ongoing process of improving the quality of assessments is the identification and management of risks associated with NVQ/SVQ assessment. In recent years, the regulatory authorities and awarding bodies have worked together in developing approaches towards identifying and responding to such risks, where the aim is to ensure effective and consistent assessment across individual approved centres. The MSSSB will expect awarding bodies to apply relevant risk management systems in the awarding of NVQs/SVQs in Sales/Key Customer Management/Telesales, and to deploy resources accordingly to address identified risks.

Awarding Body Forum

To ensure that common approaches are employed and that consistent, high standards are achieved, the MSSSB requires that a Sales and Marketing Awarding Body Forum be established, and that all awarding bodies offering the NVQs/SVQs within the Sales and Marketing Sector Qualifications Frameworks are required to attend. This Forum should also include representatives of the main professional bodies for the Sales/Key Customer Management/Telesales profession.

The Forum will enable the MSSSB to meet regularly with the awarding bodies to discuss and address assessment issues. The Forum will seek to improve the quality and consistency of assessment, and will provide the opportunity to identify and address any emerging areas of risk resulting from the performance of assessment centres, and to review external verification activity if necessary.

It is proposed that the Forum meets at least once a year, as a minimum, during the first two years of the new qualifications. Its aims will be to:

- Facilitate the flow of non-confidential information between the MSSSB and the awarding bodies regarding the delivery of the NVQs/SVQs in Sales/Key Customer Management/Telesales,
- Collate information and statistics regarding the uptake of the qualifications for each country,
- Identify trends and developments affecting delivery of the qualifications,
- Provide ongoing review of feedback upon the content of the national occupational standards making up the NVQs/SVQs in Sales/Key Customer Management/Telesales,
- Resolve any issues relating to interpretation of the standards,
- Consider risks arising from the performance of the assessment centres,

- Resolve any issues relating to the definition of occupational expertise of assessors, internal verifiers and external verifiers,
- Act as the arbiter upon interpretation of the assessment strategy.

Each awarding body will be expected to make every effort to attend the meetings of the Forum. It is accepted that an awarding body, for various reasons, may not be able to send a representative to a particular meeting. However, where an awarding body fails to attend two meetings in succession, the MSSSB may advise the awarding body chief executive and the regulatory authorities accordingly. In doing so, the MSSSB would take account of any ongoing discussion with the awarding body on issues affecting assessment and quality assurance.

Assessment in the workplace

The MSSSB considers it essential to the validity of the NVQs/SVQs that performance be assessed in the workplace. All of the units of competence within the Sales/Key Customer Management/Telesales standards are designed to reflect best practice by practitioners in real workplace settings. The standards have been tested to ensure that performance evidence can be collected in a reasonable time and cost. There are no circumstances where performance cannot be assessed by the use of one or more of the established assessment methods, including observation, the scrutiny of documentary evidence and reports, and the use of witness testimony.

Assessment of NVQs/SVQs in Sales/Key Customer Management/Telesales must involve observation by the assessor of the candidate's performance. However, it is not anticipated that such observation will be the only form of assessment. As above, there are several further established methods of assessment, and all are acceptable for use when assessing these NVQs/SVQs.

Where a candidate is not in a position to provide evidence across aspects of a particular unit(s) due to their current assignment or position, they will need to agree upon suitable opportunities to generate evidence, such as through work placement or simulation. This must be planned and agreed with the assessment centre and, if necessary, with the employer at the start of the qualification.

The evidence provided, together with information gained from discussion with, and questioning by, the assessor, should enable candidates to show that they:

- Have achieved all of the stated outcomes of effective performance,
- Have demonstrated all of the behaviours which underpin effective performance,
- Possess, and are capable of applying, all of the required aspects of knowledge and understanding.

Use of expert witness testimony

Observation of the candidate's performance will include some observation by the assessor and it is also anticipated that observation may also be undertaken by a relevant 'subject matter' expert(s). A subject matter expert, or 'expert-witness', must:

- Be occupationally competent in the activity which they witness and would be considered to be a 'good role model' for the candidate,
- Understand the national occupational standards covering the activity about which they are providing witness testimony.

Use of simulation

The MSSSB believes that the most reliable evidence is generated through work activities occurring naturally in the workplace. As there are no aspects of the standards which cannot be assessed by using one or more of the established assessment methods, the use of simulation is not permitted.

Occupational expertise of assessors and verifiers

It is important that assessors, internal verifiers (IVs) and external verifiers (EVs) of NVQs/SVQs have appropriate occupational expertise to fulfil their roles. This is required in addition to the achievement of the further requirements specified in national codes of practice and encompassed within the quality assurance procedures of the awarding bodies. The assessment process must be credible, and assessors and verifiers perform an essential role in achieving this.

The MSSSB does recognise that the search for experience and ability has to be tempered with the availability of assessors and verifiers. However, awarding bodies must ensure that the assessors and verifiers recruited by assessment centres fulfil all of the relevant requirements. The requirements for the occupational expertise of assessors, IVs and EVs are set out below, and it will be the responsibility of the Awarding Body Forum to monitor their effectiveness and to provide any recommendations for modifications.

Occupational expertise of assessors

Assessors for the NVQs/SVQs in Sales/Key Customer Management/Telesales must:

- Have relevant expertise and experience in Sales/Key Customer Management/Telesales relevant to the level of the NVQ/SVQ that they are seeking to assess, and to the NVQ/SVQ being progressed by the candidate. To assess NVQs/SVQs at:
  - level 5, the assessor must have worked at an appropriate level of seniority,
  - level 4, the assessor must have operated at an equivalent level or above,
  - levels 2 and 3, the assessor must have operated at a technical/operational level or above in a sales function,
- Possess the required qualifications and requirements for assessors as specified at the time and agreed in national codes of practice,
- Keep up to date with developments in relevant Sales/Key Customer Management/Telesales practice,
- Have a thorough understanding of the national occupational standards making up the NVQs/SVQs which they are seeking to assess.

For example, and as a guide, it is considered preferable that assessors will have worked in the Sales/Key Customer Management/Telesales occupational area and at an appropriate level for a least one year, with such experience gained within the last four/five years. The MSSSB will be pleased to offer further guidance, particularly upon the use of assessors who do not fulfil these guidelines.

Occupational expertise of internal verifiers

IVs for the NVQs/SVQs in Sales/Key Customer Management/Telesales must:

- Have relevant expertise and experience in Sales/Key Customer Management/Telesales relevant to the level of NVQ/SVQ that they are seeking to internally verify, and to the NVQ/SVQ being progressed,
- Possess the required qualifications and requirements for IVs as specified at the time and agreed in national codes of practice,
- Keep up to date with developments in relevant Sales/Key Customer Management/Telesales practice,
- Have a thorough understanding of the national occupational standards making up the NVQs/SVQs which they are seeking to internally verify, and be able to provide advice upon the interpretation of the standards.

Again, as a guide, it is considered preferable that internal verifiers will have worked in the Sales/Key Customer Management/Telesales occupational area and at an appropriate level for at least two years, with such experience gained within the last four/five years. Again, the MSSSB will be pleased to offer further guidance.

Occupational expertise of external verifiers

EVs for the NVQs/SVQs in Sales/Key Customer/Telesales Management must:

- Have an occupational understanding of working within Sales/Key Customer Management/Telesales at a level, and within the operational area(s), appropriate to the qualifications which they are externally verifying,
- Possess the required qualifications and requirements for EVs as specified at the time and agreed in national codes of practice,
- Have a thorough understanding of the national occupational standards making up the NVQs/SVQs which they are seeking to externally verify.

It is highly desirable that EVs have occupational experience of working within Sales/Key Customer Management/Telesales, and if not, they must at least have experience of working in related occupational areas, for example, management. The MSSSB will be pleased to offer further guidance.

Structure of the Sales/Key Customer Management/Telesales suite of NVQs/SVQs

Each NVQ/SVQ is comprised of a number of:

1) Mandatory units, which all candidates seeking to achieve the particular NVQ/SVQ must attain,
2) Optional units, from which candidates can select, according to the functions that they undertake within their particular roles and responsibilities.
3) Mandatory or optional units (‘***M/O’***) are units that were argued to be either mandatory or optional depending on job context. This variation was introduced in order to promote flexibility of structure to serve specific employers’ needs.

The structure of the NVQs/SVQs, and in particular the range of optional units available at each level, are designed to allow flexibility. This recognises the variations in Sales/Key Customer Management/Telesales must roles, and their associated responsibilities, across this profession at the different levels. A consequence of this is that several units of the standards are either mandatory, or available as options, at more than one level of the various NVQs/SVQs.

However, the MSSSB considers it important that undue duplication be avoided when candidates select the units to be attained when progressing through the levels of the various NVQs/SVQs. This will ensure that those candidates who go on to achieve higher level NVQs/SVQs, having already attained one at a lower level, are able to demonstrate, and be recognised for, their increasing breadth and depth of competence across the Sales profession.

Preventing undue duplication of units attained

The MSSSB has therefore placed restrictions upon the number of units that a candidate might ‘carry forward’ when progressing a higher level NVQ/SVQ. These restrictions are set out in summary below.

The MSSSB should also like to emphasise that it is not a requirement that candidates attain a lower level NVQ/SVQ before progressing a higher level. For example, a Sales professional with the appropriate levels of responsibility/experience might therefore elect to progress, say, a level 4 NVQ/SVQ without having attained the level 3, or level 2 if it is available.

Restrictions regarding the units that may be carried forward

Each level of the NVQ/SVQ within the Sales/Key Customer Management/Telesales suite requires the same total number of units to be achieved. The number of units at each level is:

1) 6 units in total at level 2,
2) 7 units at level 3,
3) 8 units at level 4,
4) 9 units at level 5.

The number of mandatory units required varies between the various NVQs/SVQs.

As well as requirements covering those units which are mandatory, the following further requirements are made upon the choice of units available to candidates attaining different level NVQs/SVQs:

1) Those candidates who have attained a level 2 Sales/Key Customer Management/Telesales NVQ/SVQ, and who go on to progress a level 3 Sales NVQ/SVQ, will only be permitted to include up to two of those units (mandatory and/or optional) attained at level 2 amongst those selected for level 3,
2) Those candidates who have attained a level 3 Sales/Key Customer Management/Telesales NVQ/SVQ, and who then go on to progress a level 4 NVQ/SVQ, will only be permitted to include up to two of those units (mandatory/optional) attained at level 3 amongst those selected for level 4,
3) Those candidates attaining a level 4 Sales/Key Customer Management/Telesales NVQ/SVQ, who then go on to progress a level 5 NVQ/SVQ, will only be permitted to include up to three of those units attained (mandatory or optional) at level 4 amongst those selected for level 5.

3 National Occupational Standards

5.4 Manage and prioritise time for sales activities

What is this unit about?

This unit is about managing and prioritising time in your sales role. The heart of effective time management is being able to plan and manage time on a daily and weekly basis to achieve sales targets.

You will be expected to demonstrate sound time management principles when undertaking a range of activities including analysing time, planning use of time in the light of your objectives, prioritising activities, delegating activities, and reflecting continuously on overall performance.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

Sales Executives

Outcomes of effective performance

You must be able to

1. Identify your personal and career targets
2. Analyse how time is spent and what opportunities exist for continuous improvement by keeping a detailed log of all work activities
3. Consult your line manager or colleagues about your use of time and reflect on feedback
4. Identify which periods of time are most productive and aim to make the most of them
5. Identify key work-related priorities and evaluate the use of your time in dealing with priority actions
6. Identify where there are any anomalies in your use of time or where you waste time
7. Evaluate all tasks you undertake and eliminate unnecessary tasks that are not directly related to your objectives
8. Delegate or share tasks which are time consuming but not a major contributor to your personal achievement
9. Consolidate tasks to reduce workload and time wastage
10. Develop a motivational time management plan or weekly schedule, prioritising all tasks in order of relative importance and urgency
11. Reflect on major obligations and targets directly relating to your role
12. Review long-term commitments and immediate goals to ensure you are on track to achieve personal goals and sales targets

Behaviours underpinning effective performance

1. You take an analytical approach to evaluating time management
2. You develop an understanding of the most effective use of work time
3. You realize that some tasks take longer than others
4. You use your time wisely
5. You consolidate tasks
6. You evaluate the sales benefits of all tasks and eliminate those that are unimportant
7. You delegate, share or negotiate tasks with your line manager
8. You trade off or share tasks with other team members
9. You monitor and review time management against sales targets
10. You are flexible but remain in control at all times

Knowledge and understanding requirements

You need to know and understand

General knowledge and understanding

1. The importance of time management and the impact it can have on sales success
2. Why effective long term performance in the sales function relies on successful establishment of a work/life balance
3. How a sales team member uses and measures the use of time
4. How to carry out a regular time-use analysis and use it to increase your efficiency
5. Best practice time management techniques
6. Why prioritising tasks by balancing urgency and importance is important
7. The concept of delegation and how to delegate effectively
8. How to prepare daily and weekly time plans
9. How to vary work to keep it interesting
10. How to avoid time wasting activities
11. The importance of saying no in certain situations
12. How to make time management motivational
13. How to review and reflect on time use and its contribution to your sales objectives

Industry/Sector specific knowledge and understanding

1. Relevant sector legislation relating to Health and Safety, working hours and employment responsibilities and rights

Context specific knowledge and understanding

1. Organisational sales strategies and plans
2. Your organisation's approach to time management
3. Organisational and personal sales forecasts and targets
4. Organisational weekly and daily call targets
5. The geographical distribution and concentration of your customers
6. The scope of your area of responsibility
7. Non-selling activities that need to be undertaken in your area of responsibility and how to manage the time these activities take
8. How travel plans may affect your effective use of sales time
9. Who you can delegate work to

7.8 Demonstrate compliance with legal, regulatory and ethical requirements for sales activities

WHAT IS THIS UNIT ABOUT?

This unit is about representing the organisation that you work for in ways that are consistent with its values and ethical principles, and which fulfil legal and regulatory requirements.

Organisations must show that they act responsibly in relation to their customers, investors, the communities in which they work and their staff. Organisations must obey the law in key areas such as health and safety, employment, finance and company law. Most importantly for salespeople, organisations must obey contract law and avoid illegal activity such as misrepresentation. They are also responsible for the security of customer data. Most organisations have to work within specific regulations and ethical frameworks for their sector.

For the purposes of this unit, 'organisation' can mean a self-contained entity such as a private sector Company, a charity, a local authority or a significant operating unit with a relative degree of autonomy within a larger organisation.

WHO THIS UNIT IS FOR?

Sales Team Leaders and Sales Executives

OUTCOMES OF EFFECTIVE PERFORMANCE

You must be able to

1 Demonstrate an understanding of the legal, regulatory and ethical requirements relevant to your job

2 Explain the consequences for you, your employer and your customer if you do not comply with legal, regulatory and ethical requirements

3 Follow organisational procedures for raising concerns about legal, regulatory and ethical issues.

4 Provide full reports to appropriate people about any failures to meet legal, regulatory or ethical requirements.

BEHAVIOURS WHICH UNDERPIN EFFECTIVE PERFORMANCE

1 You make time available to understand updates in legal, regulatory and ethical requirements

2 You identify and raise ethical concerns

3 You are vigilant for potential risks

4 You seek appropriate information and knowledge

5 You encourage others to share information and knowledge efficiently within the constraints of confidentiality

6 You show sensitivity to customers' needs and manage these effectively

Knowledge and understanding

You need to know and understand

General knowledge and understanding

1 The importance of an ethical approach

2 Relevant legal and regulatory requirements governing contracts between suppliers and customers

Industry/sector specific knowledge and understanding

1 Legal, regulatory and ethical requirements in your sector

Context specific knowledge and understanding

1 Policies and procedures that make sure people meet the requirements

7.2 Sell products or services face-to-face

What is this unit about?

This unit is about selling to customers face to face. Some contact with your customers may be via telephone, e-mail or in writing but successful performance in this unit involves direct contact with customers.

The unit aims to encourage sales performance in a number of areas but in particular after initial contact has been made with customers. The unit includes identifying your customer's buying needs, promoting benefits and features of your organisation's products and services, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.

The unit also requires you to pick up and respond to verbal and non-verbal buying signals, both negative and positive, as well as demonstrating good levels of knowledge and understanding of your organisation's products and services.

Who is this unit for?

Sales Executives and Sales Team Leaders

Outcomes of effective performance

You must be able to

1. Identify customer requirements through the use of careful questioning and confirm them by summarising their buying needs and interests
2. Identify products or services which match your customer's needs and confirm with your customer that they are suitable
3. Interpret buying signals which are given by your customer and act on them to progress sales
4. Structure the face to face sales discussion effectively to include an overview of key features and benefits of products and services and give your customer the opportunity to fully discuss and assess them
5. Provide your customer with materials to support the promotion of products or services
6. Evaluate potential trade-offs that will be mutually beneficial to your customer and to your organisation
7. Record, analyse and act on any area in which your product or service does not meet your customer's requirements
8. Give your customer clear information and make proposals that meet their requirements
9. Obtain the support of colleagues when looking to overcome customer objections and meet customer needs
10. Close the sale by gaining the commitment of your customer and complete the formalities of the sale following organisational procedures

Behaviours that underpin effective performance

1. You are customer focused at all times
2. You show respect for customers and understand and empathise with their views
3. You avoid prejudging customers based on appearance, behaviour and communication
4. You are honest, sincere and ethical in your chosen sales approach
5. You communicate articulately and effectively,listen actively and adopt an appropriate communication strategy for each customer
6. You demonstrate an in-depth knowledge and understanding of products and services on offer
7. You use the most effective questioning technique for your sales situation
8. You adapt to different audiences and their requirements
9. You work with other sales team members to avoid duplication of tasks and to maximise sales opportunities

Knowledge and understanding

General knowledge and understanding

You need to know and understand

1. The sales cycle and how it helps sales team members to structure and progress their sales contacts
2. The differences between proactive and reactive selling
3. Techniques that can be applied when selling in face-to-face situations, including cross-selling, up-selling and the sale of add-ons
4. Methods for assessing maximum and minimum returns and how to prioritise development of leads according to potential value and probability of closure
5. Verbal and non-verbal listening and questioning techniques suitable for selling in face-to-face situations
6. The differences between benefits and features and how to sell them effectively
7. How to involve your prospect in reaching a solution to any sales problem
8. Methods for recording messages accurately and ensuring they are dealt with by appropriate people promptly
9. The range of behaviours displayed by customers and how to manage them constructively
10. How to overcome customers' objections sensitively and constructively and how to respond effectively to their queries
11. Effective methods for closing sales
12. How to evaluate and measure the success of face-to-face sales contacts

Sector/industry specific knowledge and understanding

1. Legal, regulatory and ethical constraints relating to selling in your sector/industry
2. Organisational and sector regulatory requirements and practices relating to selling
3. Competitive practices and activities

Context specific knowledge and understanding

1. Organisational objectives and plans for face-to-face sales contacts
2. The structure of your organisation and its products or services
3. Organisational policies and procedures relating to your products or services
4. Your organisation’s target market and all its significant features
5. Competitor activities, products and services and latest developments in your organisation’s markets
6. Sales targets for your own area of responsibility and limits of your personal authority
7. Processes for recording customer call information and follow-up activities
8. Who to communicate with about important information relating to customer calls
9. Your organisation’s requirements for closing sales and securing orders
10. Customer and prospect feedback activities and how to channel the information effectively
11. Available literature and support materials for the selling process
12. Who to go to to secure effective sales support for customers

7.3 Sell products or services over the telephone

What is this unit about?

This unit is about identifying, developing and closing sales over the telephone from both inbound and outbound calls.

The unit includes identifying your customer's buying needs, promoting benefits and features of your organisation's products and services, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.

The unit also requires you to pick up and respond to verbal and non-verbal buying signals, both negative and positive, as well as demonstrating good levels of knowledge and understanding of your organisation's products and services.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

Sales Executives and Sales Team Leaders

Outcomes of effective performance

You must be able to

1. Identify your objectives for selling products and services over the telephone both by making and receiving calls
2. Use call lists or leads provided by your organisation and prospect those most likely to produce sales
3. Assess the potential of prospects and prioritise calls according to value and probability of closure
4. Plan sales calls and identify how to obtain customer information and relaying key sales messages
5. Use structured questions to obtain information from prospective customers about their needs
6. Use structured questions to explain the major benefits of using key products or services and to demonstrate their compatibility with features and functions
7. Explain the benefits and features of your products or services, interpret your prospect's reaction to those and decide how best to progress the sale
8. Deal with customer queries and objections with clear and accurate responses
9. Agree the basis of your customer's interest and their overall requirements
10. Gain a commitment from your customer and close the sale
11. Grasp opportunities to develop a positive relationship with customers and identify and pursue further customer contact
12. Provide customer feedback and reaction to products or services to appropriate people in your own organisation

Behaviours which underpin effective performance

1. You show respect for customers and understand and empathise with their views
2. You are honest, sincere and ethical in your telephone sales approach
3. You communicate articulately and listen actively
4. You adopt appropriate verbal and non-verbal communication options
5. You use the most effective questioning techniques for the sales situation
6. You adapt your behaviour to audience requirements
7. You work with other sales team members to avoid duplication and maximise sales opportunities

Knowledge and understanding

You need to know and understand

General knowledge and understanding

1. The sales cycle and how it helps sales team members to structure and progress their sales contacts
2. The differences between inbound and outbound telephone selling
3. The different situations in which telephone selling is appropriate and the advantages and disadvantages of selling by telephone
4. The differences between proactive and reactive selling
5. Techniques that can be applied when selling on the telephone, including cross-selling, up-selling and selling add-ons
6. Methods for assessing maximum and minimum potential and how to prioritise calls according to value and probability of closure
7. Verbal, non-verbal, listening and questioning techniques suitable for selling over the telephone
8. How to operate your telephone system efficiently
9. The differences between benefits and features and how to sell them effectively
10. How to involve your prospect in developing and closing a sale

11. Methods for recording messages accurately and ensuring they are dealt with by relevant people promptly

12. The range of behaviours displayed by customers and how to manage them constructively

13. How to overcome customers' objections sensitively, constructively and effectively

14. Effective methods for closing sales

15. How to evaluate and measure the success of telephone sales calls

16. The range of interactive ICT options available to support effective telephone sales activities

Sector/Industry specific knowledge and understanding

1. Legal, regulatory and ethical constraints relating to telephone sales and the purchase and use of telephone contact lists

2. Regulatory requirements relating to the completion of customer transaction documentation

3. Competitive practices and activities

Context specific knowledge and understanding

1. Organisational objectives and plans for telephone sales contacts
2. The structure of your organisation and its products or services
3. Organisational policies and procedures relating to your products or services
4. Your organisation's target market and its significant features
5. Competitor activities, products and services and latest developments in your organisation's markets
6. Sales targets for your own area of responsibility and the limits of your personal authority
7. Processes for recording customer call information and follow-up activities
8. Who to communicate with about important information relating to customer calls
9. Your organisation's requirements for closing sales and securing orders
10. Customer and prospect feedback activities and how to channel the information effectively
11. Available literature and support materials for the selling process
12. Who to go to to secure effective sales support for customers

MSSSB

1.1 Obtain and analyse sales-related information

What is this unit about?

This unit is all about obtaining and analysing information that helps you to understand the markets you sell into and the volume, mix and value of the products or services you sell.

The unit stresses why it is important to use market information and the role that you play in finding information from different sources, analysing it and considering the implications for the organisation.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

This unit applies to Sales Executives and Sales Team Leaders

MSSSB

Outcomes of effective performance

You must be able to

1. Consult colleagues in the sales team about the information they need to develop their knowledge and understanding of customers and markets

2. Identify appropriate sources of information relevant to your organisation's markets, customers and competitors

3. Ensure that information sources are sufficient, relevant, valid and reliable and evaluate the benefits and risks of using each source

4. Gather sales-related information continuously using planned systems and taking ad hoc opportunities

5. Select and use a variety of analytical tools and methods to analyse market information

6. Identify the target audience for each category of sales-related information and communicate it effectively

7. Ensure that the sales-related information is stored safely and securely and is accessible to appropriate people

8. Monitor and evaluate the usefulness of sales-related information continuously

9. Obtain feedback from colleagues about the relevance and usefulness of the sales-related information that is being used

10. Work with colleagues to identify the sales-related information that should be gathered in future.

Behaviours which underpin effective performance

1. You balance the benefits and risks of using information to support and inform the sales function
2. You consult and communicate effectively with all internal stakeholders involved in obtaining, analysing and using market information
3. You constantly seek feedback on the value and usefulness of sales-related information
4. You analyse sales-related information effectively and efficiently
5. You present your analysis of sales-related information professionally

MSSSB

Knowledge and understanding

You need to know and understand

General knowledge and understanding

1. The importance of using up to date and relevant market information to support sales-related decisions

2. The differences between primary and secondary data

3. How to identify trends in sales-related data

4. Different sources of market information including government agencies, the internet and market research

5. How to use a variety of analytical tools to analyse sales-related information and why each one might be chosen in a given situation

6. Different ways of presenting quantitative and qualitative market information

7. How to obtain feedback from colleagues about the usefulness of sales-related information

8. How to evaluate the suitability, relevance, validity and reliability of market information

9. How the use of sales-related information can result in changes to the marketing mix and the marketing and sales strategy

10. The relationships between marketing, sales and other functions and how that impacts on the collection, storage and use of sales-related information

Industry/Sector specific knowledge and understanding

1. Legal and ethical issues relating to the use of market information

2. Sales-related codes of practice for the industry/sector

3. Government sources of information appropriate to the industry/sector

4. Sources of current market information relevant to the industry/sector

Context specific knowledge and understanding

1. The information needs of the sales function
2. Budget allocations for obtaining market information
3. Who within the organisation should receive sales-related information
4. Organisational policy on the storage of information
5. How to load information into the organisation's databases and systems
6. What sales-related information is used for
7. The frequency of information collection and analysis
8. How to use appropriate software packages for analysing and presenting sales-related information

2.8 Develop, implement and monitor sales call plans

What is this unit about?

This unit is all about developing an effective sales call plan. An effective plan is one that enables sales team members to meet their personal sales targets. It also leads to the achievement of organisational turnover, profit and growth targets.

The unit is designed to ensure that you prepare call plans covering each individual customer. The plan ensures that customer needs are identified and opportunities for selling, up-selling, and cross-selling are fully exploited.

You will need to show professionalism and sensitivity towards your customers and your desire to meet customer needs at all times.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

This unit is suitable for Sales Executives

Outcomes of effective performance

You must be able to

1. Identify customers and prospects to contact by telephone, email or in person
2. Determine the time available to deal with your prospective or existing customer in order to plan time effectively
3. Prepare and assemble sales materials and sales angles that can be used during your contact with customers or prospects
4. Identify personal sales targets appropriate to your customer base and access to prospects
5. Seek to identify your customer's or prospect's current situation, needs and wants in relation to products and services, using a variety of effective questioning techniques
6. Identify competitors with whom your prospect or customer has any connections
7. Highlight your own organisation's strengths and use testimonials to demonstrate the benefits and features of your organisation's products and services
8. Seek to show how your organisation's products and services can solve customer problems and add value and benefit to the customer experience
9. Use questions to identify specific customer needs and wants
10. Establish the strength of the prospect and their level of interest
11. Identify actions that need to be taken to progress and close the sale
12. Review the call to identify ways of improving your sales techniques

Behaviours underpinning effective performance

1. You show respect for customers, understand and empathise with their views
2. You make contact to make an appointment ahead of a sales call where appropriate
3. You are honest, sincere and ethical in your sales approach
4. You are articulate and a good listener and you use appropriate verbal and non-verbal communication
5. You plan the use of time effectively
6. You work with other sales team members to avoid duplication and maximise sales opportunities

Knowledge and understanding requirements

You need to know and understand

General knowledge and understanding

1. How to develop a call plan and record the outcome of each call effectively
2. The sales cycle and how it helps you to structure and progress sales contacts
3. Techniques that can be used when selling face-to-face or on the telephone, including cross-selling and up-selling
4. Methods for estimating maximum and minimum returns and how to prioritise calls according to the potential value and probability of a sale
5. Listening and questioning techniques for selling or progressing a sale over the telephone
6. The difference between benefits and features and how to sell them effectively
7. How to involve your prospect in reaching a decision about the sale
8. Methods for recording messages accurately and ensuring they are dealt with by relevant people promptly
9. The range of behaviours displayed by customers and how to manage them constructively
10. How to overcome customers' objectives sensitively, constructively and effectively when responding to their queries
11. Effective methods for closing a sale

12. How to evaluate and measure the success of sales calls

13. The range of interactive Information and Communication Technology (ICT) equipment available to support effective sales activities

Sector specific knowledge and understanding

1. Legal, regulatory and ethical issues relating to sales, including the purchase and use of contact lists

2. Organisation and sector regulatory requirements and practices relating to selling and customer transaction records

3. The practices and activities of your competitors

Context specific knowledge and understanding

1. Your organisation's objectives and plans for telephone sales activities
2. Organisational procedures for call planning
3. Organisational templates and proformas available for recording sales calls
4. Your organisation's products and services
5. Your organisation's customer base analysed segment by segment
6. Organisational policies, procedures and service offers that relate to products and services
7. Competitor activities, products and services and the latest developments in your organisation's markets
8. Sales targets for your own area of responsibility and limits of your personal authority
9. Organisational procedures for recording customer call information and follow-up activities
10. Who to keep informed about important customer call information
11. Organisational procedures for closing orders and securing sales, including organisational guidelines on after-sales agreements
12. Customer and prospect feedback activities and how to channel the information effectively
13. Your organisation's interactive technology requirements relating to sales activities
14. Available literature and support materials for the selling process
15. Support and technical assistance available to sales team members
16. Organisational methods for evaluating and measuring sales success

4.9 Manage your own personal and professional development in sales

What is this unit about?

This unit is about managing your personal and professional development in order to achieve both personal and team objectives.

It will therefore be important to understand your own role, your contribution to the team and how it fits into the achievement of organisational strategies. In doing so, it is vital to reflect on organisation and personal values, career and wider personal aspirations.

It is important to identify your and your manager's requirements for knowledge, skills and abilities in current and future roles.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

Senior Sales Managers, Key Customer Managers, Sales Managers, Sales Team Leaders and Sales Executives.

Outcomes of effective performance

You must be able to

1. Reflect on your own thoughts, beliefs, values and behaviours and review whether or not they fit with those of your organisation

2. Identify compromises that you need to make in your own attitudes and behaviour in order to meet the core beliefs, values and behaviours expected by your organisation

3. Recognise in yourself obsolete behaviour, attitudes and mindsets that may have a negative impact on your sales role

4. Seek feedback on your personal performance and act on any criticisms

5. Identify your present and future knowledge and skills needs

6. Identify the steps you need to take to develop your own skills and competences

7. Identify opportunities to ensure that your development meets the changing shape of your organisation, its customers and its markets

8. Identify different learning experiences that are mutually beneficial to you and your organisation

9. Determine personal and professional development objectives appropriate to your and your organisation's needs.

10. Develop a personal and professional development plan that is aligned with organisational approaches

Behaviours which underpin effective performance

1. You address the current and future demands on you

2. You recognise your organisation’s culture, values and beliefs and aim to align them with your own

3. You are sensitive to the need to adopt organisational values and beliefs

4. You demonstrate a commitment to continuous professional development

5. You take a reflective practitioner approach to personal and professional development

6. You take pride in delivering high quality work

7. You make the most of support and guidance available to you through your organisation

8. You take a proactive approach to determining personal and professional objectives for your future development.

Knowledge and Understanding

You need to know and understand

General knowledge and understanding

1. The basic principles that underpin personal and professional development
2. The importance of balancing your own values and beliefs with those of your organisation
3. How to set personal objectives to underpin personal and professional development in sales roles
4. How to undertake an analysis of personal and organisational development needs
5. How to assess the range of personal and professional development opportunities available to you through your organisation
6. Your own individual learning styles and how they might impact on the types of personal and professional development that is appropriate to you
7. Different types of professional bodies which offer CPD opportunities
8. How to monitor the quality of your work
9. How to gain feedback on and support for personal and professional development requirements

Industry/sector specific knowledge and understanding

1. The role of professional and awarding bodies relating to the sales function

2. The range of legal and regulatory knowledge and understanding you need in your sales role

Context specific knowledge and understanding

1. What your organisation requires of you

2. The vision and objectives of your organisation and how your current and future development might impact on organisational success

3. Your own and your organisation's beliefs and values

4. Your preferred learning styles

5. Your personal development plan

6. Training opportunities offered by your own organisation and learning opportunities relating to sales functions

7. The role of professional and awarding bodies relating to the marketing and sales function.

8. Organisational policy on personal and professional development

9. Your own limitations based upon your current level of responsibility and autonomy within the organisation

10. Reporting lines within your organisation and their impact on personal and professional development

11. Where and how to obtain feedback and support for your personal and professional development

MSSSB

6.3 Sell products and services at trade fairs, exhibitions or conferences

What is this unit about?

Trade fairs and exhibitions are a major investment of time, money and effort and it is imperative that sales people take every opportunity that arises.

This unit is designed to focus on the range of activities associated with preparing for and taking part in a trade fair or exhibition and the organisation that is needed to make the most of the sales opportunities they present.

Who is this unit for?

Sales Executives

MSSSB

Outcomes of effective performance

You must be able to

1. Identify the targets for sales and creation of prospects during the event and the sales message that will be used to achieve this

2. Invite sales prospects to the event in a way that makes it feel a worthwhile experience for them

3. Agree procedures for collecting names, addresses and business cards of potential customers attending the event and identify the dress code

4. Prepare for the event by getting up to date with product literature, prices lists, up-selling and cross-selling opportunities and how to sell at the event

5. Evaluate other contributors to the event and identify ways in which your organisation’s products or services could be sold as a complement to theirs or in competition with theirs

6. Work with other exhibitors to identify areas of compatibility and agree joint opportunities for the sale of add-ons, up-selling or cross-selling

7. Assess delegate lists for those attending the event and identify target prospects

8. Use appropriate verbal and non-verbal communication to attract and engage your target audience and keep your conversation focussed to find quick ways to establish your customer’s needs and wants

9. Collect and use customer testimonials and case studies to support your sales message at the event

10. Gain commitment for sales or follow-up meetings after the event and avoid inviting rejection and make appointments for follow-up meetings, ensuring that the right people are available for that meeting

11. Evaluate the effectiveness of your sales approach at the event and reflect on lessons learned for future events

Behaviours underpinning effective performance

1. You work with others to plan and prepare for events

2. You demonstrate an in-depth knowledge and understanding of your organisation's products and services

3. You follow the agreed dress code and dress for success in the context of the event

4. You communicate key selling messages effectively

5. You adopt positive verbal and non-verbal communication messages

6. You stay alert all times and are professional in all dealings with customers

7. You use resources effectively during the event to maximise sales success

8. You evaluate sales effectiveness after the event

MSSSB

Knowledge and understanding requirements

You need to know and understand

General knowledge and understanding

1. The purpose of exhibitions, trade fairs and conferences and how they produce sales opportunities

2. How to prepare and plan for events

3. How to use your time effectively during events

4. What promotional materials are needed for the sales event

5. How to cross-sell and up-sell during events

6. How to use verbal and non-verbal communication skills effectively and how to avoid negative behaviours

7. Different methods and processes for collecting and recording sales leads information

8. The importance of following up leads after the event

9. How to evaluate the effectiveness of sales events and measure overall success

Industry/sector specific knowledge and understanding

1. Legal, ethical and social requirements relating to selling at trade fairs, exhibitions and conferences in your industry/sector

2. Which events are most appropriate to your industry/sector

3. Competitor activity in relation to attending trade fairs, exhibitions and conferences

Context specific knowledge and understanding

1. Sales strategies, plans and targets and how important the sales event is in achieving them
2. Your role and responsibilities in relation to the event
3. Literature and promotional materials available to you during the event
4. The layout of the event and how to use available space effectively
5. The dress code for the event
6. Who to go to for help during the event
7. The scope of your authority in your own area of responsibility
8. The process for capturing customer and prospect information during the event
9. The timelines for the event
10. Who else is attending the event and what are their roles

MSSSB

6.4 Undertake sales demonstrations

What is this unit about?

This unit is designed to enable sales team members to prepare for and provide creative, professional and inspiring demonstrations of their organisation's products or services to customers.

You need to have sufficient understanding of and competence in relation to the products or services and be able to demonstrate it, promote all the features and benefits, answer customer questions and deal with sales objections.

This unit demands that you should identify customer needs and interests for products and services and ensure that the demonstration meets customer needs effectively

You need to provide a professional demonstration of products or services and to take opportunities to progress the sale as a result.

Who is this unit for?

Sales Executives

MSSSB

Outcomes of effective performance

You must be able to

1. Identify and establish customer needs and interests in relation to the products or services offered by your organisation and set your objectives for the demonstration

2. Agree with your customer the length and the content of the demonstration and who will be present

3. Identify resources which are needed for the demonstration and plan the demonstration in a structured way, ensuring all necessary information is used to promote the features and benefits of your products or services

4. Ensure that proposals accompanying the sales demonstrations are prepared prior to meeting the customers

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

6. Deliver the demonstration in a style and manner that achieves your objectives, is appropriate to your customer's needs and ensures their safety

7. Confirm the objectives, content and method of demonstration to your customer and confirm they are satisfied that this will meet their needs

8. Engage all members of the audience in the demonstration as much as possible

9. Invite your audience to ask questions and seek clarification

10. Take opportunities to progress the sale at the time of demonstration and identify early opportunities for up-selling and cross-selling

11. Evaluate the demonstration and identify strengths and weaknesses, identifying areas of improvement for future demonstrations

MSSSB

Behaviours which underpin effective performance

1. You are sensitive to customer needs and wants in relation to the demonstration at all times
2. You assess the amount of time required to demonstrate products and services
3. You provide direction for the presentation
4. You are aware of potential barriers that might arise and identify how to overcome them
5. You are prepared to deal with problems
6. You are alert to the health and safety requirements relating to your demonstration
7. You adapt to the changing needs of your customer during the presentation
8. You demonstrate a thorough knowledge and understanding of your organisation's products or services
9. You are alert to verbal and non-verbal communication signals and respond to them appropriately
10. You engage with your audience at all times

Knowledge and understanding

You need to know and understand

General knowledge and understanding

1. Ways to establish customer needs and interests
2. The purpose of providing demonstrations of products and services to customers
3. How to provide demonstrations of products and services in a manner and style which is suitable to different audiences
4. How to adapt a demonstration of products and services to meet different audiences
5. How to set objectives for demonstrations and ensure that they shape and drive the preparation and delivery
6. The range of resources that can be used to assist in the demonstration

7. How to identify opportunities to progress sales at the time of your demonstration

8. How to ensure health and safety requirements are met

9. How to prepare for a variety of customer responses

10. The potential barriers that can exist in a demonstration and how to overcome them

11. How to read buyer signals including verbal and non-verbal cues

12. The variety of questioning techniques that can be used to encourage and engage customers in the demonstration

13. How to use listening techniques effectively

14. How to optimise opportunities for up-selling and cross-selling

Industry/sector specific knowledge and understanding

1. Legal, ethical and social responsibility requirements relating to a sales demonstration in your industry/sector

2. Health and safety requirements of the industry/sector

Context specific knowledge and understanding

1. Your organisation's sales strategy, plans and activity plans

2. Sales targets for your own area of responsibility

3. Resources available to support demonstrations

4. Health and safety requirements and your responsibilities in your own area

5. Who to go to in your organisation for additional help and support with technical and other issues

6. A detailed knowledge of the products and services of the organisation

7. The level of competence required for demonstrating products and services

8. Potential problems that might arise during demonstrations and how they might be overcome

7.1 Generate and follow up sales leads

What is this unit about?

This unit is an integral part of the sales cycle. It involves making initial contact with sales leads through a variety of different methods and establishing their needs. You need to advise potential customers of any products that may interest them and take the opportunity to promote further related products to them.

You need to obtain and record information about the contact you have with customers. This will include their buying needs and any further action required. You should also collect relevant information about other suppliers. Most of all you should discover whether a customer's interests suggest that there may be an opportunity for up selling or cross selling.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

Sales Team Leaders and Sales Executives

Outcomes of effective performance

You must be able to

1. Contact customers who have been identified as sales leads and establish initial communication
2. Obtain access to the person who can make buying decisions
3. Identify and confirm your customer's interest in particular products or services
4. Make further contact with your customer to interest them in your organisation's products or services
5. Maintain clear records of contact with customers and any further action which may be required
6. Identify the reasons why customers are interested in particular products or services and clarify opportunities for selling, up-selling and cross-selling
7. Explain the features and benefits of products or services to customers
8. Respond effectively to your customer's queries and objections or offer alternative products or services
9. Provide details about the possible terms of sales
10. Convert cold prospects to warm prospects by securing agreement to further contact with a specific sales agenda
11. Inform colleagues about possible opportunities for cross-selling and up-selling
12. Pass information about customers and their buying needs promptly and accurately to appropriate people within your organisation

Behaviours which underpin effective performance

1. You are customer focused at all times

2. You actively pursue further contact with the customers

3. You conduct sales business with your customer in a way which promotes goodwill and positive thinking

4. You remain sensitive to the needs of your customer at all times

5. You demonstrate a knowledge of the features and benefits of your products or services

6. You use effective questioning and listening techniques to establish customer interest

7. You exploit sales opportunities

8. You are not afraid to say no to unreasonable customer requests

Knowledge and understanding

You need to know and understand

General knowledge and understanding

1. How to obtain access to key decision makers
2. The most effective ways of contacting different types of customers
3. How to identify and collect information about customers and competitors
4. How to pursue opportunities for further contact with customers
5. The purpose of maintaining sales leads information at all stages and how to update systems recording systems
6. How to share information on customers with key people in your organisation
7. How the information provided by customers is assessed for potential up-selling and cross-selling
8. The difference between benefits and features in the context of selling and how to highlight them both
9. How to provide alternative solutions to customer problems
10. How to handle customer queries and objections

industry/sector specific knowledge and understanding

1. Industry practices relating to creation and following up of leads
2. Legislation and regulation relating to generating and following up sales leads in your industry/sector
3. Competitive practice in your sector
4. Ethical codes of conduct relating to the generating and following-up of leads in your industry/sector

Context specific knowledge and understanding

1. Organisational sales strategies, sales plans and sales activity plans
2. Customer segmentation strategies implemented by your organisation
3. Organisational practices for acquiring contact lists and databases
4. How to access records of customers who have high order value potential or up-selling and cross-selling opportunities
5. Organisational procedures for recording customer information
6. Practices relating to sharing of customer information across your organisation
7. The terms of sale available to customers
8. The information you can give customers including price and service features
9. When to refer customers to specialist sales teams or account managers
10. Who to inform about unsuccessful and unfruitful leads
11. Organisational procedures for recording information about customers' buying needs

7.6 Handle objections and close sales

What is this unit about?

This unit focuses on handling and overcoming sales objections in order to be able to close the sale effectively.

It covers how you must focus on preventing and overcoming objections and closing a sale in a way that is mutually beneficial to both your customer and your organisation.

You will need to evaluate a range of different sales situations and demonstrate a good knowledge and understanding of your products or services in a way that enables you to convince your customer and close the sale.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

Sales Executives and Sales Team Leaders

Outcomes of effective performance

You must be able to

1. Plan to deal with a variety of standard and unusual sales objections prior to dealing with your customer

2. Identify customer needs and wants in relation to their objections by using a variety of questioning techniques

3. Demonstrate an in-depth knowledge and understanding of your products or services in order to answer objections posed by your customer

4. Narrow down the issues that are holding your prospective customer back from agreeing the sale

5. Explore the issues with your customer to identify and prioritise concerns

6. Provide evidence to your customer of the strengths of your own company's products or services

7. Check that your prospective customer agrees with your view of how the objection can be overcome

8. Identify verbal and non-verbal buying signals as a sign of whether or not to move towards the close

9. Move towards a trial close and ask for the order letting your customer answer and addressing further objections and concerns if necessary

10. Look for further potential add-on, up-selling or cross-selling opportunities prior to closing the sale and close the sale

Behaviours which underpin effective performance

1. You know your products or services in detail
2. You control the conversation with your customer
3. You observe verbal and non-verbal signals during your dealings with your customer
4. You use effective questioning methods and techniques
5. You summarise the situation frequently
6. You allow customers time to answer and then probe customer objections further to clarify the situation
7. You are assertive, convincing and firm but also respectful and polite
8. You avoid potential barriers that exist in the sales situation and aim to overcome them
9. You are receptive to customer feedback at all times

Knowledge and understanding

You need to know and understand

General knowledge and understanding

1. Classic and unusual objections that might arise and the difference between sincere and insincere objections
2. Positive and negative verbal and non-verbal signals given in sales settings
3. The use of listening skills and how to summarise to confirm understanding
4. Different questioning techniques and how to use them effectively
5. Typical barriers that exist between customers and sales people
6. The importance of testimonials when overcoming objections
7. How to illustrate benefits and features of a product or service
8. How to negotiate effectively to close a sale and knowing when to say ‘no’ to your customer
9. The concept of cross-selling, up-selling and add-ons and how they can be used to increase sales values and profitability
10. Techniques for closing a sale
11. The difference between assertive and aggressive behaviour in the context of closing sales

Industry/sector specific knowledge and understanding

1. Legal, ethical and regulatory issues that relate to selling of products or services in your industry/sector

2. Competitor information in order to make key competitor comparisons

3. Industry/sector pricing structures and their impact upon sales objections

Context specific knowledge and understanding

1. Sales targets for turnover, growth and profitability

2. Details of your organisation's products or services

3. Organisational procedures for dealing with objections

4. The scope of your authority and responsibility when dealing with objections

5. Concessions available in your area of responsibility and when authority is required

6. Resources available to counter the sales objections

7. How to use testimonials to progress a sale

8. How to identify and exploit opportunities for up-selling , cross-selling and selling of add-ons

9. Who to go to when in need of support to overcome objections

10. Organisational techniques for closing sales

11. Organisational procedures for accepting confirmation of an order

MSSSB

8.1 Input and access data in your organisation's information systems

What is this unit about?

This unit is about sales data. You must be able to use both manual and computerised information systems to store and access information and to supply it to others.

The unit is designed to ensure that you appreciate the importance of storing information in the right place as well as being able to deal with matters such as managing out of date information, handling confidential information and working within legal and regulatory limits.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

Sales Executives

MSSSB

Outcomes of effective performance

You must be able to

1. Ensure that information sources are clear and fully accessible
2. Ensure that the information supplied is correctly transcribed and is in an appropriate format before entering it into the system
3. Input and store sales data following organisational procedures
4. Access sales data following organisational procedures
5. Keep information confidential to those authorised to know it
6. Meet the requirements of data protection legislation
7. Identify potential breaches of confidentiality or problems relating to confidential information and follow organisational guidelines to inform appropriate people
8. Ensure that all out of date information is dealt with following organisational guidelines
9. Identify opportunities for improving data collection and recording systems in your area of responsibility and inform those with authority to make the change
10. Follow organisational health and safety procedures relating to the use of computer equipment

MSSSB

Behaviours that underpin effective performance

1. You work within your own area of responsibility and limits of authority
2. You demonstrate a broad awareness of your organisation's software system
3. You input data accurately and correctly
4. You store data securely following organisational procedures
5. You work with others to develop data inputting, storage and security practices
6. You work within Data Protection and Health and Safety legislation
7. You follow organisational procedures for storing information
8. You contribute to organisational improvements and work practices

Knowledge and understanding requirements

You need to know and understand

General knowledge and understanding

1. The uses of IT in the sales function
2. The reasons why information is needed for sales activities
3. Sources of information and how they can be gathered and used
4. The reasons for using an established data storage system
5. The role of both manual and computerised systems and the advantages and disadvantages of each
6. Ways of classifying information
7. The importance of having organisational procedures for storing information
8. How to identify information to match sales team requirements
9. The different methods of presenting information
10. How to plan and organise searches for information
11. The implications for the organisation of entering incorrect data
12. Why certain types of information are confidential
13. What is a breach of confidentiality and what are the consequences if there is on

Industry/sector specific knowledge and understanding

1. The legal, regulatory and ethical requirements for data inputting and maintaining confidentiality in your industry/sector
2. Industry protocol for data storage

Context specific knowledge and understanding

1. Data input and access requirements for the sales function
2. Potential information sources
3. Organisational procedures for disclosing confidential information
4. What constitutes confidential information
5. Who is authorised to receive and access confidential information
6. What is a breach of confidentiality and what action is taken should a breach occur
7. How information is stored and accessed
8. Methods, formats and templates for displaying organisational information
9. Software and hardware used by the organisation
10. The scope of your area of responsibility and associated authority

MSSSB

8.2 Assist customers to obtain finance for purchases

What is this unit about?

This unit is about assisting customers to obtain finance to buy products or services.

The unit involves calculating the potential borrowing needs of your customer and identifying a variety of finance options which may be appropriate to their needs.

You must carry out all necessary credit checks and discuss them with your customer in advance. You will then inform your customer of the decision and implement the drawdown of financial facilities.

This unit must be undertaken in strict adherence with legal and regulatory requirements for financial services and data protection.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

Sales Executives and Sales Team Leaders

MSSSB

Outcomes of effective performance

You must be able to

1. Determine your customer's need for finance and the borrowing they require
2. Explore a range of financial options with your customer and agree their preferred option
3. Gather all necessary information to enable the application for finance to proceed
4. Inform your customer of the terms and conditions which apply to the specific finance option they have chosen
5. Provide your customer with an opportunity to deal with any concerns or ask any questions
6. Provide written proposals for a finance agreement to your customer
7. Carry out credit checks prior to confirming finance to your customer
8. Obtain additional information from your customer if initial information reveals inconsistencies or discrepancies
9. Seek support from appropriate authorities to resolve a situation in which problems occur with the finance
10. Ensure all documentation is completed accurately and in compliance with legal and regulatory requirements

MSSSB

Behaviours which underpin effective performance

1. You are customer focused
2. You are sensitive to customer needs at all times, consult them and keep them informed at all stages
3. You comply with legal and regulatory requirements relating to obtaining finance for your customer
4. You work within your own area of responsibility and level of authority
5. You are not afraid to say no to unreasonable customer requests
6. You communicate facts articulately, succinctly and meaningfully

MSSSB

Knowledge and understanding requirements

You need to know and understand

General knowledge and understanding

1. Reasons why customers may need finance
2. The variety of methods used for raising finance including hire purchase, bank loans and leasing and the advantages and disadvantages of each
3. The circumstances in which written proposals for financial agreements are necessary
4. The types of terms and conditions that apply to different financial packages
5. How to carry out credit checks or establish the credit status of customers
6. How to inform customers of decisions about finance agreements
7. What information is required in order to progress financial applications
8. The legal and regulatory requirements applied to the financial services industry and relevant to finance obtained for your customers

Sector/industry specific knowledge and understanding

1. Relevant Financial Services legislation
2. Relevant Data Protection legislation
3. Agencies involved in credit searches and securing of loans
4. The variety of financial packages available
5. Additional financial and insurance services which are available to the customer

Context specific knowledge and understanding

1. Situations in which your organisation will assist in raising finance
2. Your organisation's preferred supplier of financial packages and associated arrangements
3. Additional financial services available to sell to your customer
4. Your remit and authority for dealing with financial arrangements
5. Your organisation's own documentation requirements
6. What types of issues may arise during the arrangement of finance which are outside of your remit or authority
7. Your organisation's legal procedures for completion of documentation
8. Organisational procedures for communicating the outcome of credit searches and financial decisions
9. Who to go to within your organisation, when faced with difficulties in assisting your customer

MSSSB

8.3 Process customer orders and payments

What is this unit about?

This unit covers obtaining information from customers about their requirements, identifying the source and availability of the products or services, assessing the credit status of customers and dealing with the processing of their order.

Within this you will need to give accurate information to your customer and make arrangements to supply products or services.

One focus of the unit is on collecting appropriate information, completing order forms, raising invoices and notifying the customer whether or not processing can be fulfilled in the normal timescales.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

Sales Executives

MSSSB

Outcomes of effective performance

You must be able to

1. Identify customer requirements accurately in relation to the order

2. Check that products or services are available and inform your customer

3. Ensure that the information on the status of the order given to your customer is both prompt and accurate in terms of delivery, timing and price

4. Make arrangements to reserve or secure the products or services to ensure they are available as promised

5. Check the credit status of your customer and ensure that the sale is authorised following organisational procedures

6. Complete organisational accounting procedures to finalise the transaction and ensure that your customer is fully aware of the terms and conditions of sale

7. Ensure that your customer's requirements are communicated promptly and accurately to those responsible for fulfilling orders

8. Ensure that the reasons for any delay in fulfilling the order are accurately noted and reported promptly to a person in authority

9. Keep your customer informed of the order progress at appropriate intervals

10. Notify your customer, politely and with a clear justification about any delays

11. Ensure all information is stored securely and is available only to those who are authorised to have it

MSSSB

Behaviours underpinning effective performance

1. You are customer focused at all times
2. You are sensitive to customer needs at all times
3. You are courteous and polite
4. You calculate all charges accurately
5. You communicate effectively and articulate messages well
6. You relay relevant information to customers at appropriate times
7. You always keep your customer up to date on the progress of their order

Knowledge and understanding requirements

You need to know and understand

General knowledge and understanding

1. The importance of order processing to your organisation
2. The sources of information you need to complete the processing of orders
3. Rights and responsibilities relating to consumer protection legislation
4. The importance of customer service to effective trading
5. The variety of processes for ordering products or services
6. The different sources of information required for checking customer credit
7. The different payment methods accepted by your organisation
8. The use of databases in order processing
9. The concept of order fulfilling
10. The role of the despatch function within the organisation
11. The importance of storing information securely in databases

MSSSB

Industry/Sector specific knowledge and understanding

1. Legislation and regulations relating to confidential information and processing of payments in your industry/sector

2. The different payment methods used in your industry/sector

Context specific knowledge and understanding

1. Organisational procedures for order processing

2. Organisational procedures credit checking of customers

3. Organisational procedures for checking pricing

4. Sources of information and advice on pricing problems

5. Current discounts and special offers

6. Accepted payment methods for your organisation

7. Organisational invoicing procedures

8. Order fulfilment activities

9. Documentation used for order processing

10. Why order processing and despatch need to work together to confirm and fulfil orders

11. Service standards relating to order completion

12. Methods of communicating with customers to update them on progress and confirm orders

13. The limits of your authority relating to order processing

14. Who to go to in authority if order processing presents problems

MSSSB

8.4 Monitor the delivery of products

What is this unit about?

This unit is about preparing for despatch of goods to customers. Key aspects of this unit include ensuring all the necessary documentation is completed as well as making sure that, before hand-over, the goods are in the condition agreed with your customer at the time of the sale.

The unit also includes ensuring that the goods are confirmed as satisfactory by your customers taking the opportunity to exploit further opportunities of cross-selling, up-selling or selling add-ons at the time of hand-over.

Who is this unit for?

This unit is suitable for face-to-face selling, telesales and online selling

Sales Executives

MSSSB

Outcomes of effective performance

You must be able to

1. Check information on the order form to ensure it matches internal documentation and that goods are available for despatch

2. Ensure that the goods are prepared fully for hand-over to your customer in accordance with the terms and conditions of sale and organisational policy

3. Make changes to the order when necessary ensuring that it will satisfy customer expectations

4. Prepare documentation and records of hand-over, ensuring they are both accurate and complete

5. Record all necessary information accurately and completely

6. Ensure that the goods are handed over to your customer in accordance with the sales agreement and terms and conditions of sale

7. Check that your customer is satisfied with the goods

8. Deal with all customer problems and queries promptly and refer to somebody with appropriate authority if appropriate

9. Ensure all documentation for delivery and receipt by your customer is fully completed and accurate

10. Identify and follow up further opportunities for up-selling, cross-selling and selling add-ons

MSSSB

Behaviours underpinning effective performance

1. You are sensitive to customer needs in relation to delivery and receipt of goods
2. You check that all paperwork is complete and accurate
3. You check that the status of the goods is as determined by the order
4. You follow up opportunities to pursue further sales
5. You work within own area of responsibility and limits of authority
6. You refer problems beyond your authority to others with appropriate authority
7. You comply with legislative requirements

Knowledge and understanding requirements

You need to know and understand

General knowledge and understanding

1. The role of the sales person in the hand-over of goods to customers
2. The concept of transfer of ownership
3. The concept of hand-over of goods to customers
4. The purpose of maintaining records of hand-over preparations
5. Legislation affecting the despatch of goods
6. How to deal with customer problems and queries
7. How further sales opportunities can be identified and maximised
8. The concepts of up-selling, cross-selling and selling add-ons

MSSSB

Marketing and Sales Standards Setting Body

4.10 Ensure health and safety requirements are met in your area of responsibility

What is this unit about?

This unit is concerned with managing the overall health and safety process in your area of responsibility. It is intended to go beyond meeting health and safety legislation and move towards a situation where health and safety considerations are firmly embedded in the planning and decision making processes and the 'culture' of your area of responsibility. The 'area of responsibility' may be, for example, a branch or department or functional area or an operating site within an organisation.

Who is this unit for?

Senior Sales Managers, Sales Managers and Key Customer Managers

This unit is imported from the Management Standards where it appears as Unit E6

Outcomes of effective performance

You must be able to

1 Identify your personal responsibilities and liabilities under health and safety legislation.

2 Ensure that the organisation's written health and safety policy statement is clearly communicated to all people in your area of responsibility and other relevant parties.

3 Ensure that the health and safety policy statement is put into practice in your area of responsibility and is subject to review as situations change and at regular intervals and the findings passed to the appropriate people for consideration.

4 Ensure regular consultation with people in your area of responsibility or their representatives on health and safety issues.

5 Seek and make use of specialist expertise in relation to health and safety issues.

6 Ensure that a system is in place for identifying hazards and assessing risks in your area of responsibility and that prompt and effective action is taken to eliminate or control identified hazards and risks.

7 Ensure that systems are in place for effective monitoring, measuring and reporting of health and safety performance in your area of responsibility.

8 Show continuous improvement in your area of responsibility in relation to health and safety performance.

9 Make health and safety a priority area in terms of informing planning and decision-making in your area of responsibility.

10 Demonstrate that your own actions reinforce the messages in the organisation's health and safety policy statement.

11 Ensure that sufficient resources are allocated across your area of responsibility to deal with health and safety issues.

12 Develop a culture within your area of responsibility which puts 'health and safety' first.

Behaviours which underpin effective performance

1 You respond quickly to crises and problems with a proposed course of action.

2 You identify people's information needs.

3 You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes.

4 You are vigilant for possible risks and hazards.

5 You take personal responsibility for making things happen.

6 You identify the implications or consequences of a situation.

7 You act within the limits of your authority.

8 You constantly seek to improve performance.

9 You treat individuals with respect and act to uphold their rights.

Knowledge and understanding

You need to know and understand

General knowledge and understanding

1 Why health and safety in the workplace is important.

2 How and where to identify your personal responsibilities and liabilities under health and safety legislation.

3 How to keep up with legislative and other developments relating to health and safety.

4 The requirement for organisations to have a written health and safety policy statement.

5 How to communicate the written health and safety policy statement to people who work in your area of responsibility and other relevant parties.

6 How and when to review the application of the written health and safety policy statement in your area of responsibility and produce/provide findings to inform development.

7 How and when to consult with people in your area of responsibility or their representatives on health and safety issues.

8 Sources of specialist expertise in relation to health and safety.

9 Ways of developing a culture in your area of responsibility which puts 'health and safety' first.

10 The type of hazards and risks that may arise in relation to health and safety – how to establish and use systems for identifying hazards and assessing risks and the type of actions that should be taken to control or eliminate them.

11 How to establish systems for monitoring, measuring and reporting on health and safety performance in your area of responsibility.

12 Why and how health and safety should inform planning and decision-making.

13 The importance of setting a good example to others in relation to health and safety.

14 The type of resources required to deal with health and safety issues.

Industry/sector specific knowledge and understanding

1 Sector-specific legislation, regulations, guidelines and codes of practice relating to health and safety.

2 Health and safety risks, issues and developments which are particular to the industry or sector.

Context specific knowledge and understanding

1 Other relevant parties with an interest in health and safety in your area of responsibility.

2 The organisation's written health and safety policy statement and how it is communicated to people who work for the organisation, people in your area and to other relevant parties.

3 Sources of specialist health and safety expertise used in your area of responsibility.

4 The operational plans for your area of responsibility.

5 The resources allocated to and across your area of responsibility for health and safety.

6 Allocated responsibilities for health and safety in your area and the organisation in general.

7 Systems in place in your area of responsibility for identifying hazards and assessing risks and taking action.

8 Systems in place for monitoring, measuring and reporting of health and safety performance in your area of responsibility.

Appendix 1: Recording forms

Unit progress record

Qualification and level:

Candidate:

To achieve the whole qualification, you must prove competence in ___ **mandatory** Units and ___ **optional** Units.

Unit Checklist

Mandatory												
Optional												

Mandatory Units achieved

Unit Number	Title	Assessor's Signature	Date

Optional Units achieved

Index of evidence

NVQ title and level:

Evidence number	Description of evidence	Included in portfolio (Yes/No) If no, state location	Sampled by the IV (initials and date)

Element achievement record

Unit:

Element:

Evidence Index No	Description of Evidence	PCs						Areas of knowledge and understanding														

Unit:

Element:

Notes/Comments

The candidate has satisfied the Assessor and Internal Verifier that the performance evidence has been met.

Candidate:	Date:
Assessor:	Date:
Internal Verifier:	Date:

Personal statement

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Unit, Elements, PCs covered

Signed by candidate:

Date:

Observation record

Unit/Element(s):

Candidate: Date of observation:

Evidence index number:

Skills/activities observed:	**PCs covered:**

Knowledge and understanding apparent from this observation:

Other Units/Elements to which this evidence may contribute:

Assessor's comments and feedback to candidate:

I can confirm the candidate's performance was satisfactory.

Assessor's signature: Date:

Candidate's signature: Date:

Witness testimony

NVQ title and level:	
Candidate's name:	
Evidence index no:	
Index no of other evidence which this testimony relates to (if any):	
Element(s):	
Date of evidence:	
Name of witness:	
Designation/relationship to candidate:	
Details of testimony:	
I can confirm the candidate's evidence is authentic and accurate. Signed by witness: Date:	

Witness (please tick the appropriate box)**:**

☐ Holds A1 or D32/D33 qualifications

☐ Is familiar with the NVQ standards to which the candidate is working

Record of questions and candidate's answers

Unit:	Element(s):
Evidence index number:	
Circumstances of assessment:	
List of questions and candidate's responses:	
Assessor's signature:	Date:
Candidate's signature:	Date