ISP Level 3 Qualifications in Professional Sales

15.4 Sales & Marketing

Award, Certificate and Diploma Qualification Specifications

Contents

Change Control

Summary of changes to this specification since last publication date

Version	Publication date	Summary of change
V0.1 (KA)	09/01/2024	Draft for review - KA
V0.2 (DH)	19/02/2024	Updated by DH – QAN / UAN, content changes to match L4 spec
V1.0 (DH)	01/03/2024	Final version published to RQF

Introduction

This qualification specification outlines all you need to know to deliver this qualification as an Approved Training Provider of the Institute for Sales Professionals (ISP) and should be read in conjunction with the ISP Approved Training Provider Guide.

You should always ensure you are using the most recent version of this specification, please check Ofqual's Regulated Qualification Framework or speak to a member of the ISP Education Team if you are unsure.

The qualification has been developed and is awarded by ISP and sits on the Regulated Qualifications Framework (RQF). The RQF is a qualification framework regulated by Ofqual.

Institute of Sales Professionals

The Institute of Sales Professionals (ISP) is an internationally recognised professional sales body, which advances and promotes excellence in the sales profession. It is a community of sales professionals building standards of excellence, diversity and education ensuring the best knowledge, understanding, skills and practice in the sales profession.

ISP want their learners and members to develop sales professional knowledge and skills through a carefully structured approach, consequently our activities include:

- Professional Registration
- Sales Code of Conduct
- Continuing Professional Development programme
- Sales Professional Framework
- Professional Sales Qualifications and Certified Sales Professional status.

The ISP has members from all areas of the sales force and being registered on an ISP qualification ensures attainment of the best knowledge, skills, behaviours, and practices in professional sales. Further information can be found on the ISP website www.the-isp.org

Sales Qualifications

ISP is an Ofqual regulated awarding body of vocationally related qualifications (VRQ's), committed to the professionalism of all members of the sales force, both in the UK and Internationally. It supports all those who work at every level of the sales function and ensures they have access to relevant career progression opportunities through learning, development, and certification.

Not only is the ISP a nationally recognised professional sales qualifications body, but it also bases its qualifications on the National Occupational Standards for sales, thus ensuring that every salesperson certificated by the ISP has achieved a nationally recognised sales qualification.

Qualifications Structure

In focussing its vision, the ISP has brought together, the ISP Sales Professionalism Framework, the ISP professional sales membership journey, and industry roles and requirements. By using all these elements of the sales journey, the ISP has developed an inclusive, relevant, robust, and worthwhile set of professional sales qualifications that satisfy both national standards and industry roles and requirements.

The ISP has developed Award, Certificate and Diploma qualifications across Ofqual Levels 2 to 6.

About the Level 3 Qualifications

There are a range of ISP qualifications available at Level 3:

- 11 one and two-unit Awards.
- Certificates formed from optional units.
- Diplomas formed from optional units.

Units can be built up over time to contribute to the Certificates and Diplomas. The qualification titles given below are the titles as they will appear on the certificate when awarded to the learner. The qualification accreditation number is the number allocated to the qualification by Ofqual for regulation. Each unit also has a unique RQF unit number which can be found in each unit specification in this document.

Key Facts

Qualification Title	Ofqual Qualification Accreditation Number (QAN)	Credit Value	Guided Learning Hours	Total Qualification Time
ISP Level 3 Award in Understanding Organisations and Sales Communication	610/3791/6	6	30	60
ISP Level 3 Award in Understanding Customer Groups, Profiling and Behaviours	610/3792/8	4	20	40
ISP Level 3 Award in Understanding the Sales and Marketing Relationship	610/3793/X	3	15	30
ISP Level 3 Award in Analysing Sales Information	610/3794/1	4	20	40
ISP Level 3 Award in Sales Prospecting	610/3795/3	3	15	30
ISP Level 3 Award in Negotiating and Closing Sales	610/3796/5	9	45	90
ISP Level 3 Award in Planning Sales Activities	610/3797/7	4	20	40
ISP Level 3 Award in Sales Pipeline Management	610/3798/9	5	25	50
ISP Level 3 Award in Developing Relationships and Remote Working	610/3799/0	6	30	60
ISP Level 3 Award in Solving Problems	610/3800/3	4	20	40
ISP Level 3 Award in Personal Motivation and Stress Management	610/3801/5	5	25	50
ISP Level 3 Certificate in Professional Sales	610/3788/6	Minimum 13 Maximum 36	65 to 184 hours	130 to 369 hours

ISP Level 3 Diploma in Professional Sales	610/3789/8	Minimum 37	185 hours +	370 hours +
ISP L3 Diploma in Sales (Apprenticeship Diploma)	610/3790/4	40	200	400

Description & Target Audience

The ISP Level 3 qualifications in Professional Sales are vocationally related qualifications (VRQs) aimed at individuals who intend to develop and gain formal recognition of their knowledge, skills, behaviours and competence of working in a sales professional role. The qualifications are suitable for individuals working in, or hoping to work in, a variety of selling and sales representative roles, with selling to clients, customers, and businesses as a major component. By achieving the qualifications learners will cover the required essentials of selling and sales representation at this level.

The units are vocationally related units and include the relevant knowledge, application, and practical elements of selling and sales representation at this level.

Progression Opportunities

Learners who achieve Level 3 Award qualifications can progress on to the Level 3 Certificate qualifications. They can then progress onto the ISP Level 3 Diploma in Professional Sales using unit credits already achieved as there is unit overlap between qualifications.

Learners who achieve the Diploma qualification can progress onto ISP's Level 4 qualifications. They can also progress using their CPD programme or onto other relevant qualifications e.g., Sales Executive Apprenticeship (Level 4).

Qualification Structures – Certificates and Diplomas in Professional Sales

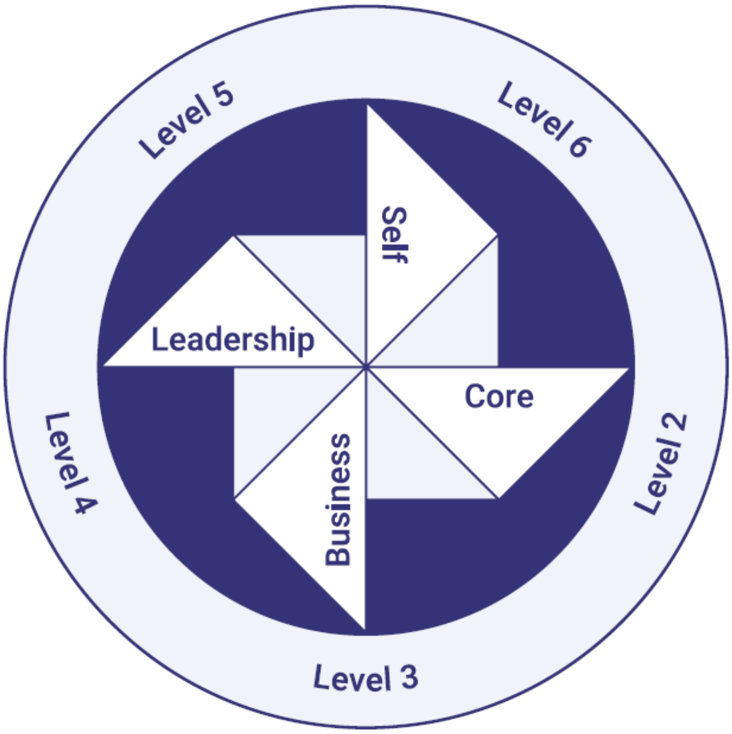
All Level 3 qualifications are constructed using a combination of units from each quadrant of ISP's Capability Framework (see image below).

The four **quadrants** create the foundation of the framework: Business, Core, Leadership, and Self.

Each quadrant is then broken down into **capabilities**. Capabilities represent the strengths that individuals need to possess to meet objectives, tackle challenges and deliver results.

Each capability is then broken down into **competencies** which detail the knowledge, skills and behaviours that are the essential building for successful performance at the relevant professional sales level.

Level 3 Competencies are represented as **Units** within this Level 3 Qualification Specification.



Delivering the Level 3 qualifications

Qualification Structures - Awards

Level 3 Award qualifications are available for one- and two-unit qualifications in the combinations shown below:

Level 3 Award in Understanding Organisations and Sales Communication

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/650/7899	L3B1	Understand Sales Communication	3	15	30	3
K/651/0342	L3B2	Understand Organisations	3	15	30	3

Level 3 Award in Understanding Customer Groups, Profiling and Behaviours

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/651/0343	L3B3	Understand Customer Groups and Profiling	3	10	20	2
K/651/0351	L3C6	Understand Customer Behaviours	3	10	20	2

Level 3 Award in Understanding the Sales and Marketing Relationship

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
M/651/0344	L3B4	Understand the Sales and Marketing Relationship	3	15	30	3

Level 3 Award in Analysing Sales Information

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
R/651/0345	L3B5	Access and Analyse Sales Information	3	20	40	4

Level 3 Award in Sales Prospecting

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
T/651/0346	L3C1	Prospect for New Business	3	15	30	3

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Level 3 Award in Negotiating and Closing Sales

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
Y/651/0347	L3C2	Overcome Sales Objections	3	20	40	4
A/651/0348	L3C3	Negotiate and Close Sales	3	25	50	5

Level 3 Award in Planning Sales Activities

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
D/651/0349	L3C4	Plan Sales Activities	3	20	40	4

Level 3 Award in Sales Pipeline Management

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/651/0350	L3C5	Sales Pipeline Management	3	25	50	5

Level 3 Award in Developing Relationships and Remote Working

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/651/0352	L3L1	Developing Relationships	3	15	30	3
M/651/0353	L3L2	Understand Remote Working	3	15	30	3

Level 3 Award in Solving Problems

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
R/651/0354	L3L3	Solving Problems	3	20	40	4

Level 3 Award in Personal Motivation and Stress Management

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/650/7929	L3S1	Personal Motivation and Sales Performance	3	10	20	2
T/651/0355	L3S2	Stress Management	3	15	30	3

Rules of Combination

Rules of combination is a description of the credit accumulation required for the achievement of a qualification.

ISP's Certificates and Diplomas are created using a combination of units from each section of the Sales Capability Framework.

Learners can select Level 4 optional Units as part of the Certificate and Diploma qualifications as these support progression to higher levels of achievement.

To achieve a Certificate, learners must pass:

- A minimum of 13 credits, maximum 36 credits
- At least two BUSINESS units
- At least two CORE units
- At least one LEADERSHIP unit or SELF unit

To achieve a Diploma, learners must pass:

- A minimum of 37 credits
- At least three BUSINESS units
- At least four CORE units
- At least one LEADERSHIP unit
- At least two SELF units

To achieve an Apprenticeship Diploma, learners must pass:

- 40 credits
- All units as prescribed below

Level 3 Diploma in Sales (Apprenticeship Diploma)

To achieve the Level 3 Diploma in Sales (Apprenticeship Diploma), learners must pass the units shown below.

See Appendix 2 and Appendix 3 for more information.

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	TQT	GLH	Credit
L/650/7899	L3B1	Understand Sales Communication	3	30	15	3
R/651/0345	L3B5	Access and Analyse Sales Information	3	40	20	4
T/651/0346	L3C1	Prospect for New Business	3	30	15	3
Y/651/0347	L3C2	Overcome Sales Objections	3	40	20	4
A/651/0348	L3C3	Negotiate and Close Sales	3	50	25	5
D/651/0349	L3C4	Plan Sales Activities	3	40	20	4
J/651/0350	L3C5	Sales Pipeline Management	3	50	25	5
K/651/0351	L3C6	Understand Customer Behaviours	3	20	10	2
L/651/0352	L3L1	Developing Relationships	3	30	15	3
R/651/0354	L3L3	Solving Problems	3	40	20	4
Y/651/0356	L3S3	Plan Professional Development	3	30	15	3
		TOTAL		**400**	**200**	**40**

Note that the Level 3 Diploma in Sales (Apprenticeship Diploma) does not cover all the KSBs that are assessed at End-Point Assessment.

Mapping of the above Units to all KSBs is shown in Appendix 3.

Please contact eqa@the-isp.org if you need further information on the rules of combination for this qualification.

Overview of units

BUSINESS units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/650/7899	L3B1	Understand Sales Communication	3	15	30	3
K/651/0342	L3B2	Understand Organisations	3	15	30	3
L/651/0343	L3B3	Understand Customer Groups and Profiling	3	10	20	2
M/651/0344	L3B4	Understand the Sales and Marketing Relationship	3	15	30	3
R/651/0345	L3B5	Access and Analyse Sales Information	3	20	40	4
K/650/7905	L4B6	Use Digital Technologies	4	15	30	3

CORE units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
T/651/0346	L3C1	Prospect for New Business	3	15	30	3
K/650/7914	L4C2	Prepare and Present Sales Solutions	4	20	40	5
Y/651/0347	L3C2	Overcome Sales Objections	3	20	40	4
A/651/0348	L3C3	Negotiate and Close Sales	3	25	50	5
D/651/0349	L3C4	Plan Sales Activities	3	20	40	4
J/651/0350	L3C5	Sales Pipeline Management	3	25	50	5
K/651/0351	L3C6	Understand Customer Behaviours	3	10	20	2
D/651/0457	L2C5	Understanding Customer Service	2	20	40	4

LEADERSHIP units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/651/0352	L3L1	Developing Relationships	3	15	30	3
T/650/7927	L4L6	Understanding Leadership Styles and Motivation	4	10	20	2
M/651/0353	L3L2	Understand Remote Working	3	15	30	3
L/651/0460	L2L3	Understand Change in the Workplace	2	15	30	3
M/650/7925	L4L4	Participating in Coaching and Mentoring	4	20	40	4
R/651/0354	L3L3	Solving Problems	3	20	40	4

SELF units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/650/7929	L3S1	Personal Motivation and Sales Performance	3	10	20	2
T/651/0355	L3S2	Stress Management	3	15	30	3
L/650/7933	L4S4	Self-Management	4	15	30	3
Y/651/0356	L3S3	Plan Professional Development	3	15	30	3
K/650/7932	L4S3	Continuing Professional Development (CPD)	4	15	30	3
T/651/0463	L2S3	Understand Legal, Regulatory and Ethical Frameworks	2	10	20	2
M/650/7934	L4S5	Contributing to an Inclusive Culture	4	10	20	2

Total Qualification Time (TQT) & Guided Learning Hour (GLH) Definitions:

Total Qualification Time (TQT)

TQT is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

Total Qualification Time is comprised of the following two elements:

- the number of hours which ISP has assigned to a qualification for Guided Learning; and
- an estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study, or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the Immediate Guidance or Supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Guided Learning Hours (GLH)

GLH is the activity of a Learner in being taught or instructed by – or otherwise participating in education or training under the Immediate Guidance or Supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

For these purposes the activity of 'participating in education or training' shall be treated as including the activity of being assessed if the assessment takes place under the Immediate Guidance or Supervision of a lecturer, supervisor, tutor or other appropriate provider of education or training.

Learner entry requirements

There are no formal entry requirements. However, learners should be able to work at level 4 or above and it is recommended they have a minimum of GCSE grade 4/C or above in English and maths. This is to ensure the learner can work at the functional skill level required of this qualification.

Training providers are responsible to ensuring they undertake a robust initial assessment of the learner prior to enrolment on to this qualification and they must satisfy themselves that the learner is working to the appropriate level, both academically and vocationally.

This qualification is approved for learners 18 plus in England and internationally.

Recognising Prior Learning (RPL)

Ofqual definition of RPL is the:

(a) identification by awarding body of any learning undertaken, and/or attainment, by a Learner.

   a. prior to that Learner taking a qualification which, the awarding body makes available or proposes to make available, and
   b. which is relevant to the knowledge, skills and understanding which will be assessed as part of that qualification, and

(b) recognition by an awarding body of that learning and/or attainment through amendment to the requirements which a Learner must have satisfied before the Learner will be assessed or that qualification will be awarded.

Therefore, prior to the commence of a qualification, a Training Provider may apply the use recognition of prior learning or prior achievement to reduce the amount required to prepare a learner for assessment.

For further information on how Training Providers can apply to use RPL as described above, please refer to the Recognition of Achievement and Prior Learning Policy available in the ISP Provider Portal.

Qualification Assessment

The qualification is a combined knowledge and competence qualification. It is assessed through the completion of a portfolio of evidence, which must be internally assessed, and quality assured by the Training Provider. A portfolio of evidence gives Providers flexibility in how individual assessment criteria are assessed.

Learners must achieve all the pass criteria across all units, to be awarded a Pass. Examples of evidence for the portfolio could include:

Knowledge criteria:

- worksheets
- record of oral and written questioning
- assignments/projects/reports
- candidate and peer reports
- record of professional discussion

Skills and behaviour criteria:

- assessor observation - completed observational checklists
- witness testimony
- record of professional discussion
- candidate and peer reports

Assessors can use other methods of assessment providing they are valid and reliable. Providers must take all reasonable steps to avoid any part of the assessment of a learner (including any internal quality assurance and invigilation) being undertaken by any person who has a personal interest in the result of the assessment.

Each Unit has a suggested assessment method and assessor guidance to explain the depth a of evidence required.

Where a Training provider wishes to used other centre-devised assessment methods these should be agreed with ISP Quality Manager before delivery commences.

All assessment evidence for this qualification should be contained within a Learner portfolio of evidence which should be internally assessed, and quality assured by the Approved Training Provider. External quality assurance is carried out by the ISP prior to certification (subject to ISP's Direct Claim Status policy).

All Learning Outcomes within each Unit must be met to achieve the qualification. Learner evidence within their Portfolio must be clearly mapped against the earning outcomes and assessment criteria and the location of learner evidence must be indicated in the portfolio of evidence.

Assessors should assess only against the assessment criteria provided in this specification. Any additional assessment criteria grading will not be included in any external quality assurance activity undertaken by the ISP without prior agreement.

This qualification is only graded at Pass, with successful learners achieving a Pass.

Simulation & Realistic Working Environments

Simulation

Simulation can be used for permitted units (see Assessor guidance within each unit Specification for more details), although ideally, it should only form a small part of the evidence for the qualification. Evidence may be produced through simulation where this is clearly stated in the assessor guidance for the unit. Simulation must be undertaken in a 'realistic working environment' (RWE). An RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures, and requirements for cost-effective working. Guidelines for using RWE can be found below.

Realistic Work Environment

It is essential that organisations wishing to operate an RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in an RWE the following guidelines must be met:

1. The RWE is managed as a real work situation.
2. Assessment must be carried out under realistic business pressures.
3. All services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations.
4. Learners must be expected to achieve a volume of work comparable to normal business practices.
5. The range of services, products, tools, materials, and equipment that the candidates use must be up to date and available.

6. Account must be taken of any legislation or regulations in relation to the type of work that is being carried out.
7. Learners must be given workplace responsibilities to enable them to meet the requirements of the units
8. Customer perceptions of the RWE is similar to that found in the work situation being represented
9. Learners must show that their productivity reflects those found in the work situation being represented.

Achievement Logs

Introduction

This document is designed to work alongside the learner Portfolio of evidence required for this qualification.

Assessor/Tutor Guidance

All Learning Outcomes of the selected units must be met to achieve the qualification. Learner evidence must be mapped against the Learning Outcomes and the location of learner evidence must be indicated in this Achievement Log. Assessors also need to use the learning outcomes' assessment criteria to ensure learners' have achieved the learning outcome. The qualification is not graded, with successful learners achieving a pass overall.

The Assessor is the sector competent person who has been approved by the ISP to deliver/assess this qualification. The assessment requirements and assessment strategy for this qualification are in the Specification and these requirements must be adhered to.

Assessment criteria

Learning Outcomes can be assessed using a variety of methods including:

- Record of observation of performance in the workplace
- Professional discussion
- Reflective account product evidence
- Work based projects
- Testimony from senior colleagues/clients
- Personal report of actions and circumstances
- Special project
- Assignments
- Records of questioning
- Other

The location of the evidence must be indicated against each Unit in your Achievement Log.

Knowledge Assessment Criteria

These can be assessed by a variety of methods including:

- Assignment

- Portfolio
- Question and answer verbal (ensure records are kept)
- Other

The location of the evidence must be indicated against each Unit in your Achievement Log.

Award Achievement Log

As each assessment criteria are completed the achievement log should be completed, recording the achievement, location of the evidence, the completion date, and the signature of the Assessor. Once all the assessment criteria for a unit have been completed the Assessor and learner should both complete the declarations at the end of the unit achievement log. The Assessor must be fully satisfied that the learner has achieved all the requirements and the evidence is attached and mapped before signing the unit off. The Assessor and Learner must also complete the appropriate comments box.

Certificate & Diploma Achievement Log

All units are listed in the log; if there are optional units not completed by the learner, please annotated these accordingly. As each unit is completed the relevant details should be entered into this Qualification Achievement Log. Once the Assessor is completely satisfied that the learner has achieved all necessary units to complete the qualification, the declaration as the bottom of the page should be signed by the Assessor.

Claiming Competence & Certification

The Provider should enter the results for the qualification and all relevant units on the ISP Registration & Certification template, once they have been signed off by the Assessor and verified by the IQA. Unit results may be entered individually as each unit is signed off by the Assessor or as a whole once all necessary units have been completed and signed off by the Assessor.

For centres with Direct claim status:

Qualification certificates will automatically be issued once pass results have been entered by the Provider on the ISP template against all the relevant units (all the units necessary for the learner to achieve the qualification).

For centres who do not have direct claim status:

An External Quality Assurer (EQA) will be appointed to you, once you have registered your first learners, in order to carry out relevant ISP Quality Assurance Procedures and report on your qualification/s. They will make at least one visit to your Provider each year and will issue an EQA Report form after each visit. Please note that Learner certificates will not be issued until after the first EQA visit has happened, and your centre has been satisfactorily verified by the EQA.

The EQA communicates with ISP through the EQA Report form, which ensures sufficient sampling of evidence in order to confirm that ISP quality standards are being applied before the issue of any certificates. In line with Ofqual requirements, we ask you to ensure that all assessment logs and tracking documentation are up to date and complete before each of the EQA visits. All such records should be available to the EQA and kept for a period of 3 years from the date of learner completion. Please ensure you keep, as a condition of this approval, a complete copy of the Centre Approval documentation you have issued to us, as from time to time the EQA and other ISP personnel may wish to review such documentation.

Assessor requirements

ISP Qualifications require nominated assessors for this qualification to meet the following:

- Demonstrable occupational competence in Sales equivalent to at least one level above the level of this qualification. This can be in the form of qualification achievement and/or work experience in a similar sales role.
- Where sales leadership competence is required, we would expect the assessor to be able to demonstrate occupational expertise and experience in a sales leadership role.

ISP also require that Assessors hold, or are working towards one of the following assessor qualifications:

- Level 3 Award in Assessing Competence in the Work Environment
- Level 3 Certificate in Assessing Vocational Achievement
- A1 Assess Learner Performance Using a Range of Methods
- D32 Assess Learner Performance and D33 Assess Learner Using Different Sources of Evidence

Where assessors are ‘working towards’ qualifications, the Training Provider should ensure that relevant support and checks are in place to ensure that learner assessment is fair consistent, e.g., re-assessment, standardisation activities, increased internal quality sampling etc.

ISP requires Assessors to complete a minimum of 24 hours of sales related CPD activity per year. This should be documented on the ISP CPD Platform wherever possible and provided to the External Quality Assurer (EQA) when requested.

Internal Quality Assurance requirements

ISP Qualifications require nominated IQA’s for this qualification to meet the following:

- Demonstrable occupational competence in Sales equivalent to at least one level above the level of this qualification. This can be in the form of qualification achievement and/or work experience in a similar sales role
- Where sales leadership competence is required, we would expect the assessor to be able to demonstrate occupational expertise and experience in a sales leadership role.

ISP also require that the IQA(s) hold, or are working towards one of the following qualifications:

- Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice
- Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice
- D34 or V1 verifier awards

Where IQA(s) are 'working towards' qualifications, the Training Provider should ensure that relevant support and checks are in place to ensure that learner assessment is fair and consistent, e.g., support from an experienced IQA, standardisation activities etc.

ISP also recommends that the IQA to complete a minimum of 24 hours of sales related CPD activity per year. This should be documented and provided to the External Quality Assurer (EQA) when requested.

Appendix 1 – Qualification Content

This section provides details of the structure and content of this qualification.

Each unit overview includes:

- Unit number and title
- Unit Ofqual reference number
- Level
- Credit value
- GLH
- Learning outcomes (what the learner will learn in this unit)
- Assessment criteria (what the learner will be able to demonstrate as a result of achieving the learning outcome
- Unit purpose and aims
- Details of the relationship between the unit and relevant apprenticeship standards
- Location of the unit within the subject/sector classification system
- Indicative content (a guide for tutors/coaches delivering the learning as to what should be included to achieve the learning outcomes and meet the assessment criteria. This content is not prescriptive but is intended to provide helpful guidance to tutors, coaches, and learners.
- Assessor guidance to provide more information about the evidence that should be provided to meet the required breadth and depth of each Learning Outcome.

Qualification Unit Specifications – Business

L3B1 Understand Sales Communication

Unit Title	L3B1 Understand Sales Communication		
Level	3		
Credit Value	3		
Guided Learning Hours	15		
Learning Outcomes	**Assessment Criteria**		
1. Understand effective communication in sales	1.1	Explain the importance of effective communication in the sales process	
	1.2	Explain communication channels used within sales	
	1.3	Assess the strengths and weaknesses of different types of communication used within sales	
	1.4	Summarise the factors that affect communication within sales	
2. Understand a communication cycle and barriers	2.1	Explain a communication cycle and its application in the workplace	
	2.2	Explain barriers to effective communication	
	2.3	Evaluate ways to overcome barriers to communication	
3. Be able to plan communication for a target audience	3.1	Evaluate the factors that impact on the selection of communication types for different target audiences	
	3.2	Create a plan to communicate with a target audience	
	3.3	Analyse own communication preferences to identify improvement areas and actions	

Additional Information	
Unit purpose and aims	To enable learners to understand communication in sales and how to overcome barriers. Learners plan to communicate with a target audience.
Details of the relationship between the unit and apprenticeship standards	**Level 3 IT Technical Salesperson Apprenticeship** **K7** Understands how to communicate using the appropriate language and terminology for audience and cultural awareness **S1** Communication: works both independently and as part of a team and following the organisation's code of practice; demonstrates an ability to communicate effectively and present both in writing and orally at all levels, using a range of tools. **B8** Ability to communicate effectively in a variety of situations
Location of the unit within the Ofqual subject/sector classification system	15.4 – Marketing and Sales
Indicative Content	
1.	• The role that communication plays in sales processes • The importance with reference to the individual, team and organisation

	• Types of communication channels may include but are not limited to formal and informal, face to face, telephone, electronic, digital media, oral, visual, written, mass media, real time, pre-recorded etc. • Communication types, e.g., letters, memos, reports, newsletters, noticeboards; verbal: telephone calls, video conferencing, briefings and meetings, presentations; digital: intranet, emails, blogs, instant messaging, discussion forums, posts on social media sites, web chat, avatars, skype, electronic forms, apps, podcasts and webinars • Factors that affect communication, e.g., legal requirements and organisational policies • Legal requirements may include but are not limited to Data Protection Act 1998, General Data Protection Regulation (applies from May 2018), Equality Act 2010, Communications Act 2003, Digital Economy Act 2016.Learners may also refer to other local laws as relevant • Organisational policies may include but are not limited to communications policies, brand guidelines, house style, digital communication policies and procedures, standard responses, whistleblowing etc.
2.	• Communication cycles, e.g., Shannon and Weaver, Schramm, Lasswell, Berlo, Barnlund, etc. • Barriers to communication, e.g., physical, perceptual, emotional, cultural, language, interpersonal, organisational culture, management style, team dynamics etc. • How to overcome communication barriers, e.g., understand audience and their motivations, use appropriate language, select the right time, place and channel for communication etc.
3.	• The legal and organisational factors that affect the communication type/channel • How to match a suitable communication type/channel to a target audience • Communication types, e.g., letters, memos, reports, newsletters, noticeboards; verbal: telephone calls, video conferencing, briefings and meetings, presentations; digital: intranet, emails, blogs, instant messaging, discussion forums, posts on social media sites, web chat, avatars, skype, electronic forms, apps, podcasts and webinars

Assessor Guidance	
1.	Learners should explain how communication supports different stages of the sales process giving at least two workplace examples to support their points to highlight why effective communication is important. They should explain at least four communication channels with an example of each. The strength and weaknesses of at least four communication types should be assessed with consideration of situations when each might be most effective. Learners should summarise at least one legal and at least one organisational factor that affects sales communication.
2.	Learners should explain at least one communication cycle with an example of who it works to demonstrate their own understanding. At least three barriers to effective communication should be explained with an evaluation of how these could be overcome. The three barriers should include one individual, one team and one organisational barrier.

3.	At least two types of target audience should be considered with an evaluation of how the learner would approach them differently. The learner should select one of the audiences that they have evaluated for 3.1, and create a communications plan related to them with at least three communication activities. An analysis of their own communication preferences should be completed with at least two actions specified to improve their own communications with colleagues and customers. Learners should ideally use their own organisation's audiences in their response to this LO. If they are not currently in a sales role, two realistic case study audiences should be signposted for them to use.

L3B2 Understand Organisations

Unit Title	L3B2 Understand Organisations	
Level	3	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the UK legal forms for organisations and operational functions	1.1	Describe the UK legal forms for organisations
	1.2	Explain the different operational functions within an organisation
	1.3	Outline how the sales function relates to other organisational functions
	1.4	Describe the roles and responsibilities of sales professionals at different levels of the organisation
2. Understand the context in which an organisation operates	2.1	Describe the internal forces that impact on an organisation
	2.2	Describe the external forces that impact on an organisation
	2.3	Conduct a PESTLE analysis for an organisation

Additional Information	
Unit purpose and aims	To enable learners to understand the UK legal forms for organisations and operational functions, and the context in which one organisation operates. Learners will conduct a PESTLE analysis for an organisation.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standard.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The UK legal forms for organisations, e.g., sole trader, partnership, limited company, public sector organisation, charity, community interest company, workers cooperative etc. • The different types of organisation structure, e.g., hierarchical, matrix and flat • The operational functions within organisations, e.g., sales, marketing, communications, human resources, finance, production, customer service etc • The formal and informal organisational relationships between the sales function and other functions • Sales roles and responsibilities within organisational structures, e.g., telesales, field sales, sales team leader, sales manager, sales leader, senior sales leader, head of sales, sales director etc.
2.	• The internal forces that impact on an organisation, e.g., leadership, organisational structure, culture, employees, workforce dynamics, internal communication, organisational policies and procedures, resources and infrastructure, organisational strategy, change management practices etc.

	• The different external forces that impact on an organisation, e.g., economic, technological, political and legal, social and cultural environmental, competitive, demographic, supplier and vendor relationships, global etc. • What a PESTLE analysis is and why it is used • How to conduct a PESTLE analysis

Assessor Guidance	
1.	Learners should describe at least three legal forms for organisations. They should explain at least four different operational functions and outline how the sales function relates to each one, giving examples to support their points. Learners must describe the roles and responsibilities of sales professionals at three different levels of organisations.
2.	Learners should describe at least three internal and three external forces that impact on organisations. A PESTLE analysis should be conducted for one organisation. This may be the organisation that they work for, or a case study organisation provided by the centre.

L3B3 Understand Customer Groups and Profiling

Unit Title	L3B3 Understand Customer Groups and Profiling	
Level	3	
Credit Value	2	
Guided Learning Hours	10	
Learning Outcomes	**Assessment Criteria**	
1. Understand different customer groups and their motivations	1.1	Explain the methods used to segment customer groups
	1.2	Describe the motivations, attitudes and behaviours of customers
2. Be able to develop profiles for different customer groups	2.1	Define the characteristics of existing customers
	2.2	Analyse the differences between existing customers
	2.3	Develop customer profiles based on analysis

Additional Information	
Unit purpose and aims	To enable learners to understand different customer groups and their motivations. Learners will develop profiles for different customer groups.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standard.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The range of consumer segmentation bases, e.g., demographic, geographic, psychographic, technographic, occupation, behavioural, generational/life stage, income etc. • The different ways that organisations/businesses can be segmented for business to business (B2B) sales, e.g., sector, size, revenue, location, published information such as SIC (Standard Industrial Classification) code, buying criteria etc. • Motivation theories, e.g., Maslow's Hierarchy, McClelland's Three Needs, Herzberg's Two-Factor Theory etc. • The motivations, attitudes and behaviours of different consumer and B2B groups • The range of customer attitudes to buying, e.g., price sensitivity, brand loyalty, quality consciousness, convenience seekers, trend followers, value shoppers, impulse buyers, rational decision makers, emotional buyers, risk aversion, eco-friendly consumers, time-conscious shoppers, technophiles, local support, research-oriented consumers etc.
2.	• How to identify the distinguishing characteristics of existing customer groups • How to analyse information in sufficient detail to justify the conclusions made about customer groups • The components of a customer profile that help to determine why customers buy, e.g., customer demographics, information on buying patterns, psychographic characteristics, firmographic details, buyer personas, needs and challenges, key insights from customer feedback etc.

	• The sources of information that can be used to profile B2B customers, e.g., existing sales data • How to use a customer relationship management (CRM) system to analyse patterns and trends

Assessor Guidance	
3.	Learners should explain at least three methods used to segment consumer groups (bases) and three methods that are used to segment B2B customers with relevant examples to support their points. They should describe the motivations, attitudes and behaviours that customers may have, using at least three examples to support their points.
4.	Learners should define the characteristics of at least two existing customers using relevant criteria based on their organisation's requirements. They should analyse the differences between at least two customers using appropriate organisational data sources and use the findings to develop two customer profiles.

L3B4 Understand the Sales and Marketing Relationship

Unit Title	L3B4 Understand the Sales and Marketing Relationship	
Level	3	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the roles of sales and marketing teams	1.1	Describe how sales and marketing activities take place in different organisational structures
	1.2	Explain the key roles and activities of sales professionals
	1.3	Explain the key roles and activities of marketing professionals
2. Understand sales and marketing team collaboration	2.1	Evaluate the benefits of sales and marketing team collaboration
	2.2	Describe how sales and marketing teams can support each other
	2.3	Explain the factors that can cause conflict between sales and marketing teams and how to overcome them
	2.4	Describe the organisational consequences of poor sales and marketing staff collaboration

Additional Information	
Unit purpose and aims	To enable learners to understand the roles of sales and marketing teams. They will also develop their knowledge of sales and marketing team collaboration.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standard.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• Organisational structures and how sales and marketing fit within the bigger picture, e.g., as separate functions, as a merged department etc. • How sales and marketing activities relate to each other, e.g., lead generation, lead qualification, sales collateral and support, brand awareness and reputation, customer communication, nurturing prospects, feedback loop, customer retention etc. • How sales and marketing impact on each other and the importance of the relationship • The difference between a marketing orientation and a sales orientation • The job titles of people who carry out sales roles, e.g., Sales Directors, Key account managers, Business Development Managers, Sales Executives etc. • The key roles of sales professionals, e.g., face to face customer interaction, business development, account management, remote selling etc. • The job titles of people who carry out marketing roles, e.g., Marketing Directors, Marketing Managers, Digital Marketing Managers, Marketing Assistants, Graphic Designers, Social Media Managers, Content Writers etc.

	• The key roles of marketing professionals, e.g., market research, marketing campaigns, design-packaging, branding, website, promotions etc.
2.	• The benefits of collaboration between sales and marketing functions, e.g., sense of common purpose, delivering customer satisfaction etc. • The types of collaboration and support that are effective between sales and marketing teams, e.g., share information to promote understanding, regular communication, feedback etc. • The types of conflict that arise between sales and marketing staff, e.g., misunderstanding of roles and overlaps, duplication of activities, sales seen as a marketing activity, customer confusion about point of contact, lack of effective communication etc. • The organisational consequences when sales and marketing do not collaborate, e.g., misalignment of goals, poor lead quality, inconsistent messaging, missed opportunities, reduced effectiveness, lack of customer-centricity, internal conflicts/blame game, decreased revenue and market share etc.

Assessor Guidance	
1.	Learners should describe two organisational structures: one where sales and marketing are separate functions and one where they are merged into one department/function. At least three key sales activities should be explained in relation to a relevant sales job title/role, with workplace examples given to show how the activities support the success of the organisation. At least three key marketing activities should be explained in relation to one relevant marketing job title/role, with workplace examples given to show how they support the success of the organisation.
2.	Learners should evaluate the benefits of sales and marketing team collaboration by researching examples from different organisations (ideally including their own). At least three benefits of collaboration should be identified. At least two types of support activities should be described, one where the sales team support marketing activities/objectives and one where the marketing team support sales objectives. Learners should explain at least three factors that cause conflict between sales and marketing teams and how these can be overcome. At least two organisational consequences of the impact of poor collaboration should be provided with supporting examples.

L3B5 Access and Analyse Sales Information

Unit Title	L3B5 Access and Analyse Sales Information	
Level	3	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to access and store sales information	1.1	Explain why up-to-date sales related information is required by organisations
	1.2	Describe how to access internal and external sales related information
	1.3	Explain the importance of checking data for accuracy and currency
	1.4	Explain how to store sales related information safely and securely
2. Be able to identify and gather sales information about customers, markets and competitors	2.1	Define the information required to analyse organisational markets, customers and competitors
	2.2	Identify sources of information about the organisational markets, customers and competitors
	2.3	Assess the reliability of information sources
	2.4	Gather information about the organisation's markets, customers and competitors
3. Be able to use a range of methods and tools to analyse and communicate sales information	3.1	Use tools and methods to analyse sales related information
	3.2	Identify patterns and trends in the sales related information
	3.3	Communicate findings from analyses to different colleague audiences

Additional Information	
Unit purpose and aims	To enable learners to understand how to access and store sales information. They will identify and gather sales information about customers, markets and competitors. Learners will use a range of methods and tools to analyse and communicate sales information.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 3 IT Technical Salesperson Apprenticeship</u>** **S3** Data Security: operates securely in line with organisational guidance, legislation and organisational software packages and complies with security of data and can effectively record, analyse and communicate data at the appropriate level using the organisation's standard tools and processes throughout all sales interactions.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The reasons why organisations need up-to date information, e.g., to understand and guide sales strategy, to enforce sales objectives, to identify where sales team time and activities should be focused etc.

	• The importance of information to help the sales professional understand the markets they are selling into and the volume, mix and value of products/services they sell, etc. • Data veracity – how to check the quality of data for accuracy and currency, e.g., where the data has been collected from, how it was collected, and how it will be analysed • The importance of data storage against data protection, legal, ethical, and organisational considerations • Organisational policies on data storage and security • How sales related information is protected, stored, and managed • The legal and ethical issues around the use of sales-related information • How to establish and manage information systems
2.	• How to identify relevant information, on sector, competitors, own organisation policies, customers and product knowledge • Sources of information, e.g., sector bodies, industry bodies, sector magazines, internet, companies house, networking events, colleagues, competitor websites, competitor sales brochures etc. • The importance of review and verification of information to check data veracity • How to add relevant information to an organisation's database/CRM • How to check the reliability of information, e.g., trustworthiness, sufficiency, relevance, validity etc. • How to identify the benefits and risks of using each source • The limitations of sales related information
3.	• The external and internal tools and methods that can be used to understand sales related information • How to ensure the accuracy of information, e.g., by cross examining the value of information provided • How to use relevant software packages for analysing and communicating sales-related information • How to identify trends in sales related data • How to assess the value of the information against the sales strategy • How to identify the target audience level for each category of sales-related information and communicate it effectively to meet their needs • The methods that can be used to communicate data as coherent sales intelligence

Assessor Guidance	
1.	Learners should provide at least three reasons why organisations require up-to-date sales information with supporting examples. They should describe how to access at least one internal source of information and one external with details of the types of information that each of the sources can provide. Learners should explain the importance of checking data for accuracy and currency, giving two examples of what may happen if inaccurate information is used during the sales process.

	Their explanation of how to store sales information should cover the process involved and address why this is safe and secure.
2.	Learners should define at least three pieces of information that are required for their analysis of markets, customers and competitors for their organisation. They should use their definition of requirements to identify at least five potential sources of information that could be used. These should be assessed for reliability to assess the best three sources. Learners should gather information about markets, customers and competitors for their organisation from these three sources. This should be documented in a structured manner to present as evidence.
3.	Learners should use at least two tools and methods to analyse the information that they have gathered for LO2. At least six trends and patterns should be identified, two related to markets, two related to customers and two related to competitors. Learners should communicate their findings to two different target audiences at different levels, e.g., a summary for their manager, an email to their peers.

L4B6 Use Digital Technologies

Unit Title	L4B6 Use Digital Technologies	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand how digital technology supports the sales process	1.1	Analyse how digital technology is used in the sales process
2. Understand how technology supports the sales process	1.2	Explain how digital technology supports record keeping and reporting
	1.3	Explain how technology supports analysis and decision-making
	1.4	Analyse how technology improves productivity
2. Be able to use digital technology to interact with customers and colleagues	2.1	Use technology to support sales activities
	2.2	Use Customer Relationship Management (CRM) systems to support the sales process
3. Be able to review the effectiveness of digital technologies	3.1	Evaluate the appropriateness and effectiveness of digital tools and technologies currently in use
	3.2	Make recommendations for implementing digital technologies to improve sales effectiveness

Additional Information	
Unit purpose and aims	To enable learners to understand how digital technology supports the sales process. Learners will use digital technology to interact with both customers and colleagues. They will review the effectiveness of digital technologies to make recommendations to improve sales effectiveness.

Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standard.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The range of technology available to support the sales process, e.g., hardware, software, apps, • How to run virtual meetings using video technology • How to use technology to create documents, presentations, spreadsheets, etc. • Ways that technology can provide data to support decision making • The links between technology use and improved productivity, e.g., workflow management systems, instant messaging etc.
2.	• The technology tools/apps that support the sales process at each stage, e.g., lead generation tools, social media, customer demonstrations etc. • The features of different Customer Relationship Management (CRM) systems, their purpose, how they operate, and the benefits of a well-managed system
3.	• How to evaluate different technologies to understand their features and identify their potential for a sales team to use

Assessor Guidance	
1.	Learners should analyse at least three types of technology that is used in the sales process. They should explain how digital technology: • supports record keeping and reporting, giving at least two examples • supports analysis and decision making. In their assessment learners should identify at least three ways that technology improves the productivity of a sales professional.
2.	Learners should evidence using a Customer Relationship Management system (CRM) and at least two other types of digital technologies over at least a six-week period.
3.	The evaluation should cover both appropriateness and effectiveness of the tools used in LO2 and address both their own perspective and that of their organisation.

Qualification Unit Specifications – Core

L2C5 Understanding Customer Service

Unit Title	L2C5 Understanding Customer Service	
Level	2	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand the organisational systems for delivering customer service	1.1	Describe the organisational systems and related processes for delivering customer service
	1.2	Outline the methods that organisations use to measure their customer service
2. Understand how to provide consistent customer service	2.1	State why it is important to make realistic promises to customers
	2.2	Describe the techniques used by sales professionals to provide consistent customer service
	2.3	Describe how to adapt the service/product provided when customer requirements change
3. Understand how to monitor the effectiveness of customer service delivery	3.1	Describe methods used to check that customer expectations have been met
	3.2	Outline how to identify potential improvements to service delivery
	3.3	Specify how to share information with colleagues to maintain and improve service delivery standards

Additional Information	
Unit purpose and aims	To enable learners to understand the organisational systems for delivering customer service. They will also develop their knowledge of how to provide consistent customer service and monitor the effectiveness of delivery.
Details of the relationship between the unit and apprenticeship standards	Not linked to an apprenticeship standard.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The range of systems and related processes that are used for customer service delivery in organisations, e.g., Customer Relationship Management (CRM) systems, communication channels (phone, email, live chat, social media, self0serive portals, in person), customer service training programmes, Standard Operating Procedures (SOPs), Service Level Agreements (SLAs), feedback collection and analysis, escalation and issue resolution procedures etc. • The methods that organisations measure their customer service, e.g., performance metrics such as average response time, customer satisfaction scores, first-call resolution rate, customer retention rate, and Net Promoter Score (NPS) etc.

2.	• How to ensure that promises to customers are balanced with the needs of the organisation • The service standards within different organisations • The importance of being realistic in promises to customers and the consequences of overpromising • The different techniques used by sales professionals to provide consistent customer service throughout the sales process, e.g., clear communication, active listening, relationship building, needs assessment, relevant product/service knowledge to be able to respond to queries, consultative selling techniques, timely follow-up, problem-solving etc. • How to recognise when customer requirements have changed • How and when to adapt the product/service to meet changes in customer requirements
3.	• The methods that organisations use to gather feedback about customer satisfaction, e.g., surveys, Net Promoter Score (NPS), interviews, focus groups, social media monitoring, online reviews/ratings, customer support tickets, complaints, success metrics (retention rates, renewal rates, upsell/cross-sell rates) etc. • Why it is important to regularly review customer feedback to make data driven decisions, e.g., to identify potential areas of product/service improvements, to increase understanding of the target market, to gauge customer satisfaction, to build customer loyalty etc. • How to contribute to improvements to customer service • The ways that information can be shared with colleagues to maintain and improve service delivery, e.g., meetings, emails, instant messaging, updating customer relationship management (CRM) system, wikis/knowledge bases • Why it is important to collaborate with colleagues to maintain and improve service delivery standards

Assessor Guidance	
1.	Learners should describe at least two organisational systems and related processes for delivering customer service. They should outline at least three methods that organisations use to measure their customer service giving an example for each.
2.	Learners should provide at least two examples of why promises to customers should be realistic. At least three techniques that are used by sales professionals to provide consistent customer service should be described. Learners should describe at least two ways that sales professionals can recognise when customers' requirements have changed, giving examples of the action that should be taken to adapt the service/product.
3.	Learners should describe at least three methods that organisations may use to check that customer expectations have been met. At least two ways that potential improvements to service delivery should be outlined.

	At least two ways of sharing information with colleagues to maintain and improve service delivery standards should be specified, with examples of how each may work in practice.

L3C1 Prospect for New Business

Unit Title	L3C1 Prospect for New Business	
Level	3	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to prospect for new business	1.1	Describe how to identify potential sales leads
	1.2	Explain how to assess information against criteria to qualify sales leads
	1.3	Describe how conversation rates are used when prospecting for new business
	1.4	Explain how to convert cold prospects to warm prospects
	1.5	Describe how to obtain access to the people making buying decisions
2. Be able to agree and prepare for meetings with prospects	2.1	Identify and confirm prospects interest in the organisation's products/services
	2.2	Arrange sales meetings with prospects
	2.3	Match the organisation's products and services to prospects business needs
	2.4	Prepare a dialogue framework for sales meetings with prospects

Additional Information	
Unit purpose and aims	To enable learners to understand how to prospect for new business. They will agree and prepare for meetings with prospects.
Details of the relationship between the unit and apprenticeship standards	**Level 3 IT Technical Salesperson Apprenticeship** **S5** Assesses and qualifies sales leads by developing a clear understanding of clients' business needs and advising how these might be met with appropriate products, tools and techniques. **K9** Understands the sales life cycle, techniques & processes
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• How to identify potential sales leads, e.g., networking, sector information, marketing, internet, trade journals. social media, creating a personal brand, engage with relevant online groups, blogs etc., • How to develop Ideal Customer Profile(s), and why they are important • How to use qualification criteria to move suspects to prospects

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	• The relevant information to document during the qualifying process, e.g., use of customer relationship management (CRM) system or other method for systematic approach • Awareness of Data Protection legislation, e.g., GDPR • How conversation rates are calculated • How conversation rates are used when prospecting for new business, e.g., lead generation, outreach evaluation, sales funnel analysis, targeting and segmentation, optimisation and experimentation, ROI etc. • How to establish account potential • The approaches and stages used to convert prospects from cold to warm, e.g., effective questioning, exploiting opportunities for further contact, sharing information, follow-up calls, gaining appropriate commitments, using joint diaries, persistence, dealing with rejection, securing agreement etc. • The best way to ask questions and qualify answers based on prepared research • How to research and understand the key individuals within the decision-making unit (DMU), the buying process operating within the account • Ways to identify and access the right person/decision makers, e.g., effective methods that can be used for contacting different types of customers etc. • How to approach gatekeepers, e.g., using shared connections/introductions on Linked-in etc. • The importance of establishing relationships with multiple contacts in some selling situations
2.	• How to identify and collect customer information in preparation for sales meetings • How to match the organisation's products and services to prospects business needs • How to pursue opportunities to arrange sales meetings, e.g., follow-up calls, gaining appropriate commitments, using joint diaries, working on multiple contact points to help raise awareness of goods and services within the prospect business, etc. • How to formally confirm a sales meeting with prospects • How to prepare a dialogue framework including the questions to ask to find the information needed, product/service features and benefit statements • The ways that a range of questions need to be prepared and why each type is important, e.g., open, closed, probing questions. Demonstrate value. Commitment questions. Potential customer concerns.

Assessor Guidance	
4.	Learners should describe at least three ways to identify potential sales leads, giving workplace examples to support their points. They should explain at least three criteria that could be used to assess prospects, giving examples of how these are used to qualify prospects. Learners should provide at least two examples of how conversion rates are used during prospecting. They should explain three methods that can be used to convert cold prospects to warm prospects. At least three ways of how to obtain access to the people responsible for buying decisions should be described.

5.	Learners should identify and confirm at least two prospects who are interested in their organisation's products and/or services. They should arrange sales meetings with both prospects and prepare for them in advance. Evidence of preparation should be provided for the assessment, including a match of the organisation's products and/or services to each prospects business needs. Learners should prepare a dialogue framework (including questions) for the two meetings that is customised to each of the prospects' business needs and individual preferences.

L3C2 Overcome Sales Objections

Unit Title	L3C2 Overcome Sales Objections	
Level	3	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand sales barriers and objections	1.1	Explain the typical barriers between customers and sales professionals
	1.2	Describe standard and non-standard customer objections
	1.3	Explain why it is important to prepare to respond to sales objections
2. Be able to plan responses to a range of sales objections	2.1	Prepare to deal with potential customer objections
	2.2	Review previous customer objections to prepare responses to common customer objections
	2.3	Create a positive mindset before sales meetings with customers
3. Be able to handle customer objections during sales meetings	3.1	Use open and probing questions to gain customer commitment at each stage of the sales meeting
	3.2	Explore customer objections to identify and prioritise concerns
	3.3	Respond to verbal and non-verbal signals during the sales meeting
	3.4	Confirm how objections can be overcome with customers

Additional Information	
Unit purpose and aims	To enable learners to understand sales barriers and objections. They will plan their responses to a range of sales objections, and handle customer objections during sales meetings.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 3 IT Technical Salesperson Apprenticeship</u>** **K10** Understands how to negotiate, handle objections and close sales **K11** Understands the business product(s) they are responsible for selling including the relevant vendor product(s) as selected by the employer **S8** Sales process: professionally operates all sales-related tasks to maintain integrity, brand and company image during negotiations, handling of objections and closing sales with an understanding of the markets and external competitors
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The typical barriers that exist between customers and sales professionals, e.g., lack of trust, misalignment of needs and preferences, personality clash, poor

	communication skills, limited product/service knowledge, time constraints and competing priorities, use of technical Jargon and complex terminology etc. • The range of standard customer objections that should be considered to prepare for sales meetings, e.g., price, need/relevance, competitor comparison, trust/reliability, timing, risk/fear, previous experience, implementation complexity, Return on Investment (ROI), lack of Information/evidence etc. • Why Customers raise objections and how these arise • How to anticipate objections and the benefits of raising them before customers do • The range of non-standard customer objections that should be considered to prepare for sales meetings, e.g., customization compatibility ethical/sustainability concerns scalability security/privacy support/service cultural fit regulatory compliance implementation timelines integration with existing systems etc. • The reasons why it is important to prepare to respond to sales objections
2.	• Why it is important to anticipate customer objections • The actions that can be taken to prepare to deal with customers objections, e.g., identify the most common objections encountered in the organisation by reviewing previous sales interactions, consulting with colleagues, or conducting market research • How to review customer objections raised in other sales conversations to identify common customer underlying concerns and motivations • How to develop a response that addresses common customer underlying concerns and motivations • The range of techniques that are used to create a positive mindset before sales meetings with customers to enhance the chances of success, e.g., visualisation, positive affirmations, goal setting, rehearsal, role play practice with colleagues, breathing and relaxation techniques, positive self-talk, positive mindset journaling, focusing on solutions etc.
3.	• How to use probing and challenging questions to extract the impact of customers main sales objections • Ways to demonstrate respect for customer concerns • How to actively listen and observe the customer to be able to respond appropriately to verbal and non-verbal buying signals • How to explore customers issues and concerns, e.g., narrow down the issues that are causing concern, probe objections further, identify and prioritise concerns etc. • How to differentiate between sincere and insincere objections • The difference between objections and concerns; clarify how / where this sits in relation to the sale, etc. • The typical and unusual customer objections and concerns that arise during sales meetings • The legal, ethical, or regulatory issues related to sales negotiation and overcoming objections

Assessor Guidance

1.	Learners should explain at least three barriers that may occur between a sales professional and customers. They should describe at least three standard and one non-standard customer objections using examples. Learners must provide at least two reasons why it is important to prepare for potential customer objections considering the impact on the sales professional and the organisation.
2.	Learners should prepare to deal with customer objections at sales meetings with at least two prospects. Evidence of preparation should be provided for assessment, such as planning notes, reviews of previous customer objections, colleague interactions etc. Learners should provide evidence of using at least two techniques to create a positive mindset when preparing themselves.
3.	Learners should use a wide range of open and probing questions to gain customer commitment during sales meetings with at least two prospects. The sales meetings should be observed by their line manager, or a trainer/tutor/coach/mentor and a record kept of what happened (with permission from the customer). In addition to questioning techniques, the observation record should also capture how the learner explored customer objections to identify and prioritise concerns with both customers, how they responded to both verbal and non-verbal buying signals, and how they confirmed ways to overcome objections with the customers.

L3C3 Negotiate and Close Sales

Unit Title	L3C3 Negotiate and Close Sales	
Level	3	
Credit Value	5	
Guided Learning Hours	25	
Learning Outcomes	**Assessment Criteria**	
1. Understand the range of sales negotiation strategies available	1.1	Outline the range of sales negotiation strategies that are used by sales professionals
	1.2	Explain how sales professional develop their product and service knowledge
	1.3	Describe how to select sales negotiation strategies for products and services
2. Be able to plan and conduct sales negotiations with customers	2.1	Prepare for sales negotiations
	2.2	Conduct sales negotiations with customers
	2.3	Use questions to identify cross and upselling opportunities during sales negotiations
	2.4	Create a 'win-win' situation during negotiations
	2.5	Match products and service to customers' needs
	2.6	Identify verbal and non-verbal buying signals
	2.7	Use micro closes during sales negotiations
3. Be able to close sales with customers	3.1	Respond to customers objections and concerns
	3.2	Apply a trial close during negotiations
	3.3	Close the sale with customers
	3.4	Record the outcomes of customer negotiations

Additional Information	
Unit purpose and aims	To enable learners to understand the range of sales negotiation strategies available. They will plan and conduct sales negotiations with customers, and close sales.
Details of the relationship between the unit and apprenticeship standards	**Level 3 IT Technical Salesperson Apprenticeship** **K10** Understands how to negotiate, handle objections and close sales **K11** Understands the business product(s) they are responsible for selling including the relevant vendor product(s) as selected by the employer **S8** Sales process: professionally operates all sales-related tasks to maintain integrity, brand and company image during negotiations, handling of objections and closing sales with an understanding of the markets and external competitors
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• Different negotiation strategies that can be adopted by sales professionals e.g., tailored preparation, setting objectives, active listening, open questions, win-win

	approach, building strong relationships, value proposition, anchoring and framing, concessions and trade-offs, problem-solving, time pressure, multiple offers, walkaway point, emotional intelligence, continuing professional reflection and learning etc. • How sales professionals develop their product and service knowledge, e.g., study product/service materials, attend training programs, engage with internal experts, shadow experienced colleagues, use demo and trial opportunities, attend industry events and conferences, continuing professional development (CPD), role-playing and practice, customer feedback and insights, ongoing coaching and mentorship etc. • How to select suitable sales negotiation strategies according to the situation
2.	• How to prepare for sales negotiations, e.g., develop product/service knowledge, identify what is important to the customer, Kennedy's LIM-it model, plan for trade-offs, etc. • How to illustrate product/service features and benefits • The purpose of maintaining cross and up selling information and outcomes • The rationale for establishing win-win solutions • How to create win-win situations, e.g., balance the needs of the organisation and those of the buyer, use positive assertive behaviours, • How win-win negotiations protect the profitability and integrity of the organisation • Why it is important to maintain the integrity of the brand and organisational image during negotiations • Knowing when to say 'no' to a potential customer • How to sensitively reject negotiations that are not in the best interest of the organisation • How to use listening skills to help summarise and confirm agreement and understanding with the customer • How to identify buying signals, e.g., the positive and negative signals in sales settings, different types of buying signals, reacting positively to reinforce the proposition etc. • How to leverage 'ambassadors' in the room and seeking input from them to support a sales negotiation • How to use micro closing techniques to guide the conversation, build rapport, and increase the likelihood of successfully closing the sale • Why micro closes are important to keep the prospect engaged and involved in the decision-making process throughout the sales pitch
3.	• How to respond to customer objections effectively, e.g., reinstate the benefits, use questions to isolate lingering objection(s), etc. • How to propose further selling opportunities before closing, e.g., questions relating to add-ons, up-selling, cross-selling, understanding the potential available • How to confirm that all questions/objections/concerns have been satisfactorily answered • Ways to apply a trial close, e.g., ask the customer a confirmation question • How to understand what a close is in the environment being operated in

	• The sales/ buyer cycle and where you are in relation to this during negotiations with customers • How to realistically predict when closing can take place with a customer • Techniques that are used for closing sales, e.g., ask for the order (trial close, objection close, dual close, organisation close, etc.), seek commitment to move forward, know when to say ‘no’; assertive versus aggressive behaviour in closing the sale; agree customer’s next steps etc. • How to ensure that relevant information is captured and recorded against company procedures • How to accurately record any outcomes and promises; store such records appropriately; organisation’s procedures for recording and storing negotiation’s outcomes, etc.

Assessor Guidance	
1.	Learners should outline at least three different sales negotiation strategies that can be used by sales professionals, giving examples to support their points. They should explain how sales professionals develop their product and service knowledge They should describe how to select sales negotiation strategies for products and/or services by using customer examples to illustrate at least two different strategies that can be used.
2.	Learners should prepare and conduct at least two sales negotiations with customers. The negotiations should be observed by their line manager, or a trainer/tutor/coach/mentor and a record kept of what happened (with permission from the customer). The observation record should capture how the learner created a win-win negotiation, and the questions that they asked related to the cross and up-selling opportunities identified. They should evidence how products/services were matched to customer needs, and how both verbal and non-verbal buying signals were responded to. Learners should demonstrate the use at least two micro closes in each sales negotiation.
3.	The observation record (used for LO2) should also capture how the learner responded to customer objections and concerns, applied trial closes, closed the sales and updated relevant organisational records. The latter may require confirmation from the learner’s line manager if the observation is completed by an external trainer/tutor/coach/mentor.

L3C4 Plan Sales Activities

Unit Title	L3C4 Plan Sales Activities	
Level	3	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to organise sales activities to meet sales targets	1.1	Explain how to set personal sales targets
	1.2	Describe techniques used to organise daily sales activities to achieve personal targets
	1.3	Outline the importance of scheduling time for other obligations when organising sales activities
	1.4	Explain the reasons for seeking support from others
2. Be able to plan sales activities to manage personal sales targets	2.1	Plan sales activities based on prioritised customer and prospects lists
	2.2	Estimate the resource and budget requirements of the planned sales activities
	2.3	Consult colleagues when finalising sales activities planning
3. Be able to monitor, control and evaluate sales activity plans	3.1	Use agreed indicators to monitor the success of sales activity planning
	3.2	Analyse potential issues that may affect the achievement of planned activities
	3.3	Evaluate the effectiveness of personal sales planning

Additional Information	
Unit purpose and aims	To enable learners to understand how to organise sales activities to meet sales targets. Learners will develop sales activity plans to manage personal sales targets. They will also monitor, control and evaluate their sales activity plans.
Details of the relationship between the unit and apprenticeship standards	**Level 3 IT Technical Salesperson Apprenticeship** **K9** Understands the sales life cycle, techniques & processes
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• How to set personal sales targets that are SMART (specific, measurable, achievable, relevant, time-bound) • The range of techniques that can be used for organising sales activities, e.g., set daily goals, to-do lists, Kanban, delegate tasks, digital tools, sales management software etc. • The practicalities of planning sales activities and recognising the need for time to complete other tasks • How to identify when personal help is needed, e.g., a mor experienced colleague, a product technical specialist etc. • When and why others, especially more senior people, should be brought into the process

2.	• The sales cycle to structure and progress sales contacts • How to prioritise customers and prospects, according to their potential value and probability of a sale, to create objectives and targets • Ways to estimate the resource and budget requirements of the planned sales activities • How to estimate the time available to spend on each customer and prospect • The range of customer contact methods that can be used in sales activities, e.g., in-person, phone, email, social media, webinars, direct mail etc. • How to plan time efficiently, e.g., when a remote meeting can achieve the same objective with less time and spend • How to define what you want to achieve from each contact. When contacting them during sales activities • How to access and use relevant sales digital tools to support activities efficiently, e.g., customer relationship management (CRM) system, online tools etc. • Sales activity plans: incorporate all required areas; organisation procedures for sales activity plans; SMART; SWOT; legal, ethical, regulatory considerations; structure; documentation; presentation; sign off, etc. • Why it is important and useful to consult sales colleagues when planning sales activities, e.g., • The key colleagues and stakeholders that should be consulted during planning • How to adjust planned sales activities based on colleague feedback
3.	• Measure success: incorporate agreed indicators; KPI's, cost/profit ratios; growth targets; budget/target ratios; recording and reporting mechanisms; manager / stakeholder agreement; internal communications, etc • Potential issues: anticipate/identify potential problems; find appropriate solutions to problems; annotate plan implementation; agree annotations with manager; internal communications, etc. • Evaluate: organisation practices for monitoring and controlling sales activities; organisation evaluation requirements; organisation success requirements; if plan off track - actions required; internal comms procedures; recording and reporting, etc.

Assessor Guidance	
1.	Learners should explain how to set personal sales targets (linked to team targets) using the SMART model. At least two examples of SMART sales targets should be provided. They should describe at least three techniques that can be used to manage their time to organise their daily activities. The description should make links to how each helps to achieve personal targets using workplace examples. Learners should outline three examples of other work obligations that sales professionals have and how to include time to accommodate these when organising sales activities. They should provide at least three reasons covering why they may need to seek support from others, including engaging a more senior staff member.
2.	Learners should evidence planning their sales activities over at least a one-month period with clear links between activities and their prioritised customer and prospects lists.

	The planning evidence must include an estimate of resources and budget required to complete the activities. Learners should consult with at least one colleague when finalising their plans. This may be their line manager or a colleague in their team.
3.	Learners should state the indicators that they are using to measure the success of their planning activities. They should analyse at least two potential issues that may affect the achievement of planned activities and evaluate their personal sales planning in the context of their own organisation's requirements.

L3C5 Sales Pipeline Management

Unit Title	L3C5 Sales Pipeline Management		
Level	3		
Credit Value	5		
Guided Learning Hours	25		
Learning Outcomes	**Assessment Criteria**		
1. Understand sales pipeline management	1.1	Describe the importance of a sales pipeline management process for a sales professional	
	1.2	Explain the requirements of the sales pipeline process from different perspectives	
	1.3	Describe the challenges related to sales pipeline management	
	1.4	Explain how to resolve challenges related to sales pipeline management	
2. Be able to prioritise time spent on prospects by analysing sales conversion ratios	2.1	Calculate current conversion ratios for different stages of the sales pipeline process	
	2.2	Evaluate prospects at regular intervals against criteria for each step of the sales process	
	2.3	Prioritise time and effort for each prospect based on the likelihood of conversion to customer	
3. Be able to use sales tools to move prospects through the sales pipeline	3.1	Demonstrate the sales activities used to manage a sales pipeline	
	3.2	Use organisational systems and procedures to manage prospects	

Additional Information	
Unit purpose and aims	To enable learners to understand sales pipeline management processes. Learners will be able to prioritise time spent on prospects by analysing sales conversion ratios and using tools to move them though the sales pipeline.
Details of the relationship between the unit and apprenticeship standards	**Level 3 IT Technical Salesperson Apprenticeship** **S10** Database and Campaign Management: prioritises their contacts and keeps an up-to-date database knowing when and why to contact current consumers or prospects in line with organisational requirements.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The importance of a sales pipeline management process • The visibility of pipeline to self, manager and organisation to ensure that the right volume is at every stage to enable targets to be met • How to identify bottlenecks in a sales pipeline and take appropriate action

	• The challenges related to pipeline management, e.g., insufficient information collected, qualification criteria not met, slow follow up, bottlenecks in the sales cycle, low value prospects, insufficient prospects, colleague support required etc. • How to identify when there are sales professional training needs related to pipeline management and identify solutions to meet requirements
2.	• How to use information from the pipeline to identify conversion ratios • How to calculate conversion ratios for different stages of sales pipeline management, e.g., for prospect to customer, lead to customer and proposal to customer • Ways to identify the stage of the pipeline where the greatest challenges are and plan to respond to these • How to take action to resolve pipeline challenges • The processes involved in moving prospects through the pipeline, e.g., meeting criteria such as lead score, the timeline, confirming that there is a need for the product/service, a decision maker has been identified and that there is a budget in place etc. • How to use sales volume and likelihood of success to prioritise where time and effort is spent and decide on the frequency of contact with a prospect • When and how to move a prospect from the sales pipeline
3.	• The organisational activities that are followed for pipeline management, e.g., lead generation, qualification criteria, gathering information, the sources information is gathered from, how sales meetings are conducted, demonstrations, presentations, needs identification, selling value, closing etc. • The lead generation tools that can be used by sales professionals, e.g., Salesforce, LinkedIn Sales Navigator, Hubspot, Pipedrive, Zoho CRM, Leadpages, Mailchimp, ZoomInfo etc. • How to use marketing materials, • How to use lead qualifying checklists • The organisational systems and procedures that are used to manage prospects • The people involved in the pipeline management and how their roles relate to the sales professional dealing with prospects

Assessor Guidance	
1.	Learners should provide at least three reasons why the sales pipeline management process is important for a sales professional. The must explain the pipeline management process from the perspective of the sales professional, their line manager and the organisation. At least three challenges that are encountered during sales pipeline management should be described with an explanation of how each can be resolved.
2.	Learners should calculate conversion rates for prospect to customer, lead to customer and proposal to customer. They should use at least three criteria to evaluate prospects in their pipeline, and evidence that they have done this on at least three occasions in line with organisational procedures.

	Evidence should be provided of how their prospects have been prioritised based on the likelihood of conversion to customer, with plans for sales activities that align to maximise the time and effort that they have available.
3.	Learners should provide evidence that they have used their organisations required sales activities to manage their pipeline. They must provide evidence that they have used their organisations sales management database/CRM/system to track their prospects at all stages of the sales process. Examples for two prospects that have been progressed through the stages should be provided as examples.

L3C6 Understand Customer Behaviours

Unit Title	L3C6 Understand Customer Behaviours	
Level	3	
Credit Value	2	
Guided Learning Hours	10	
Learning Outcomes	**Assessment Criteria**	
1. Understand customer decision making processes in relation to the sales cycle	1.1	Describe the factors that can influence an individual customer's decision making process
	1.2	Explain how the organisational (B2B) decision making process affects the sales cycle
2. Understand how to respond to customers at each stage of the decision making process	2.1	Describe how to respond to the differing needs of consumers
	2.2	Explain how to respond to the differing needs of organisational buyers

Additional Information	
Unit purpose and aims	To enable learners to understand customer decision making processes in relation to the sales cycle. They will also develop their knowledge of how to respond to customers at each stage of the decision making process.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 3 IT Technical Salesperson Apprenticeship</u>** **S2** Customer Experience: demonstrates strong interpersonal skills and cultural awareness when dealing with colleagues, customers and clients during sales operations and whilst defining requirements with an emphasis on customer satisfaction and relationship management. **B2** The ability to interact effectively and professionally with a range of different types of customers
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The sales cycle and stages, e.g., prospecting, qualifying, contact, presentation, negotiation, closing etc. • The factors that influence individual consumer buying behaviours when selling directly to them (B2C), e.g., frequency of need, importance, logic, emotion, third party influences, buying environment, cognitive biases, past experiences, social influences etc. • The complex nature of business to business (B2B) selling and the people involved, e.g., financier, user, influencer, buyer, Initiator, decider, gatekeeper etc. • How B2C and B2B customers behave at each stage of the sales process • How B2C and B2B approaches differ, e.g., contract size, length, number of interactions, people involved etc.
2.	• The stages of the decision-making process, e.g., identify the problem, gather information, generate alternatives, evaluate alternatives, make a decision

	• The typical behaviours that individual consumers display when they are making a buying decision, e.g., asking questions verbally and in writing, comparison with competitors, discussing options with trusted people etc. • The behaviours, actions and language that different members of an organisational buying unit use and how to reflect this in own communication with them • How to adapt the sales methods to meet the needs of different people within an organisation and help them to reach consensus to buy • How to present solutions to show that all members of the decision-making unit wants and needs have been met

Assessor Guidance	
4.	Learners should describe at least three factors that can influence an individual consumer's decision making process with supporting examples. They should outline the sales cycle, then explain how the organisational (B2B) decision making process affects it, including examples of behaviours that are encountered at each stage.
5.	Learners should describe at least three ways that sales professionals can respond to differing individual buyer customer needs. Examples of at least three types of organisational buyers and their different needs should be provided, with an explanation of how a sales professional should respond to each to progress the sale.

Institute of Sales Professionals
SETTING PROFESSIONAL STANDARDS IN SALES

L4C2 Prepare and Present Sales Solutions

Unit Title	L4C2 Prepare and Present Sales Solutions	
Level	4	
Credit Value	5	
Guided Learning Hours	20	
Learning Outcomes	Assessment Criteria	
1. Understand how to prepare for sales presentations/demonstrations	1.1	Explain the key characteristics of a sales presentation/demonstration
	1.2	Evaluate the insights required to create a compelling sales presentation/demonstration for customers
	1.3	Explain how to write objectives to meet the needs and interests of customers
	1.4	Analyse potential issues and objections from customers
2. Be able to deliver sales presentations/demonstrations	2.1	Use questioning to identify customer needs
	2.2	Prepare resources for sales presentations/demonstrations
	2.3	Deliver sales presentations/demonstrations to meet specified objectives
	2.4	Use listening and questioning to guide the sales process
	2.5	Respond to customers questions and objections
	2.6	Agree the next steps (call-to-action) with customers
3. Be able to evaluate sales presentations and/or demonstrations	3.1	Evaluate presentations and/or demonstrations to identify areas for improvement

Additional Information	
Unit purpose and aims	To enable learner to understand how to prepare for sales presentations/demonstrations. Learners will deliver and evaluate sales presentations and/or demonstrations.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standards.
Location of the unit within the subject/sector classification system	15.4 – Marketing and Sales
Indicative Content	
1.	• Why it is important to understand own organisation, the industry, the competition, organisation's products/services, qualifying criteria • Why it is important to understand the potential customer and identify the main contact; money, authority, need • The key characteristics of a sales presentation, e.g., tells a compelling story, highlights organisation's value proposition, aligns with customers' needs and interests, ends with a strong call-to-action, leads prospects to organisation's differentiators etc. • How to conduct a market assessment using organisation criteria, external market information and sales forecasts

	• How to undertake customer research to gain insights for sales presentations or demonstrations, e.g., techniques to evaluate sales territories, client base, competitor activity, cost of travel, business activity, take up etc. • How to set clear achievements for presentations/demonstrations, e.g., SMART objectives (Specific, Measurable, Achievable, Realistic and Timed), unique selling points (USPs), tailored to the specific customer requirements etc. • How to select appropriate presentation styles and techniques to meet customers' needs • The types of questions that customers ask and how to respond to them • Types of customer objections and how to handle them
2.	• How to identify appropriate resources based on the presentation/demonstration method and location, e.g., PowerPoint, video, brochures, price lists, physical product for demonstration • How to structure presentation to follow a clear logical order that will deliver sales objectives, e.g., clarify the customer's situation, check/probe for agreement, outline the likely impact of challenges, benefits to be achieved, gain commitment • The benefits of using existing nomenclature during presentations/demonstrations • How to adapt presentation style to meet audience and situational requirements, e.g., use of technology versus face-to-face meetings etc. • The importance of personal presentation, body language, and building rapport during presentations/demonstrations • How to ensure customer engagement and commitment by using active listening and questioning skills • How to proactively encourage customers to ask questions to discuss and overcome their concerns • How to actively listen to what the customer is saying (facts and feelings), provide answers and confirm satisfaction • Ways to gain a mutual understanding with customers • How to actively question, listen and respond to customers • How to ensure that the presentation/demonstration conclusion is a natural agreed resolution and call-to-action • How to ensure and document the agreements made with customers
3.	• How to assess personal performance in preparing and delivering the presentation/demonstration • How to learn about relevant nomenclature from sales conversations • Understanding the reasons why some parts of the presentation went to plan and any aspects that didn't • How to identify clear actions related to what to change for future presentations/demonstrations

Assessor Guidance	
1.	Learners should explain at least four characteristics of sales presentations/demonstrations in order. They should evaluate at least three insights and reach a conclusion about how these help to create a compelling presentation/demonstration.

	Learners should explain how to write objectives for presentations/demonstrations using the SMART model or similar. They must provide at least two examples of objectives to show their understanding of how these work in practice. At least three customer issues/objections should be analysed, and brief recommendations should be made about how each could be overcome.
2.	Learners should prepare at least two sales presentations OR two demonstrations. (One of each is also acceptable). These should be based on the customers response to questions to identify their needs. These can take place in their workplace, or in the training environment as part of a realistic simulated activity. The presentations/demonstrations (with questions) should last for at least 20 minutes each. Learners should prepare at least two resources to support each presentation/demonstration. Evidence of delivering the two sales presentations and/or demonstrations should be provided such as a video recording, or an observation record completed by a tutor, assessor, or a witness testimony from a manager. The observation/witness testimony should include comments related to how effectively: • Listened and questioned the customer to guide the sales process • The learner responded to questions and objections • How the next steps were agreed with the customer.
3.	Learners should provide a reflective account to evaluate all aspects of their performance in preparing and delivering their two presentations and/or demonstrations, e.g., the use of active questioning, listening, responding to queries and objections, ensure agreement etc. Their evaluation should highlight aspects that were effective and how this will be reinforced and built on in future. Aspects that can be improved should be explored and relevant actions should be included.

Qualification Unit Specifications – Leadership

L2L3 Understand Change in the Workplace

Unit Title	L2L3 Understand Change in the Workplace	
Level	2	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the rationale and impact of organisational change	1.1	Define organisational change and the types of change that are required
	1.2	Outline the internal and external reasons for change in organisations
	1.3	Describe the range of employee responses to organisational change
2. Understand how to support change in the workplace	2.1	Identify the benefits of organisational change
	2.2	Describe a change management process
	2.3	Outline how employees can support organisational change

Additional Information	
Unit purpose and aims	To enable learners to understand the rationale and impact of organisational change. They will also develop their knowledge of how to support change in the workplace.
Details of the relationship between the unit and apprenticeship standards	Not linked to an apprenticeship standard.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The range of definitions of 'organisational change', e.g., the process of making a significant change to an organization's structure, culture, or processes • The different types of organisational change, e.g., strategic, structural, process, cultural etc. • The potential internal reasons for organisational change, e.g., leadership changes, change in vision/values, new technology, deficiency in the existing structure, poor performance, decline in revenue, high employee turn-over rate, company growth etc. • The potential external reasons for organisational change, e.g., new opportunities, government regulations and laws, natural disasters/accidents/extreme weather, digital and technological advancements, fierce competition, political factors, social changes, economic collapse, market changes, customer requirements, globalisation etc. • The different types of organisational change that are implemented, e.g., transformational, transitional, reactive etc. • The typical ways that employees and managers respond to different types of proposed organisational changes

	• Types of positive change responses, e.g., acceptance, optimism, curiosity, engagement, support etc. • Types of negative responses to change (resistance), e.g., Maurer's 3 Levels, fer of the unknown, lack of trust, comfort with status quo, loss of control, economic concerns, personal beliefs etc.
2.	• The benefits that different organisations seek to gain though their change programmes, e.g., process improvements, new business opportunities, improved efficiency, improved management styles, enhanced market relevance, build staff morale, create a cohesive vision and values, develop high performing teams etc. • The benefits that change brings to individuals, e.g., skills/career development, task diversification, improved communication, opportunities for participation, career growth and promotion etc. • Organisational change management processes and models, e.g., Hiatt's ADKAR (Awareness, Desire, Knowledge, Ability, Reinforcement), Kotter's 8 Step model etc. • Barriers to organisational change and how individuals, teams and managers can support required change • How to deal with resistance to change, e.g., frequent communication, empowerment, address concerns directly, be patient, celebrate successes etc. • How organisational change can impact on the organisation's culture and values

Assessor Guidance	
1.	Learners should provide a clear definition of organisational change. At least one internal and one external reason for organisational change should be outlined with examples to illustrate the points made. Learners should provide at least two examples of potential employee responses to organisational change; one positive response and one negative response.
2.	Learners should provide at least two benefits of organisational change using relevant examples. Centres may like to provide relevant case studies to provide a focus to support the assessment. A simple change management process should be described to illustrate understanding of the steps involved in making change happen. This can include a recognised change model, and if images are used the learner should describe it in their own words to show their understanding. Learners should outline at least two ways that employees can support organisational change.

L3L1 Developing Relationships

Unit Title	L3L1 Developing Relationships	
Level	3	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the needs and expectations of colleagues and stakeholders	1.1	Describe the needs and expectations of colleagues in a sales team
	1.2	Explain the needs and expectations of other stakeholders
2. Be able to develop and maintain effective working relationships with a range of colleagues and stakeholders	2.1	Identify the needs and expectations of colleagues and stakeholders
	2.2	Perform under pressure as part of a team to progress sales
	2.3	Maintain productive and professional relationships
	2.4	Resolve relationship challenges in a professional manner

Additional Information	
Unit purpose and aims	To enable learners to understand the needs and expectations of colleagues and stakeholders. They will develop and maintain effective working relationships with a range of colleagues and stakeholders.
Details of the relationship between the unit and apprenticeship standards	**Level 3 IT Technical Salesperson Apprenticeship** **S6** Project management: works flexibly and demonstrates the ability to work under pressure independently and as part of a team to progress sales and manage their time, work flow, priorities and projects. **B7** Ability to work with a range of internal and external people **B9** Maintain productive, professional and secure working environment
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The range of colleagues that affect and support sales professionals • How to identify different stakeholders, internal and external colleagues • How to conduct a stakeholder analysis to determine the best communication approaches to meet needs • The importance of establishing trust and confidence with colleagues and stakeholders • The difference between needs and expectations • The typical needs and expectations that colleagues may have • The typical needs and expectations that stakeholders may have • The benefits of understanding what others require • The principles of effective communication

2.	• How to identify the needs and expectations of colleagues and stakeholders • Typical needs and expectations that colleagues and stakeholders may have • How to balance others needs with personal needs and expectations • How to explore and align mutual needs with a colleague • Ways of meeting the needs and expectations of others, e.g., active listening, clear and accurate communication, understanding of their environment/situation etc. • The principles and methods of effective communication and how to adapt approaches according to others' preferences • Ways of checking that the needs and/or expectations of others have been met • How to build trust and confidence when working with a range of different people as a professional sales person • How to manage time, work flow, priorities and projects when working with other people • How to work under pressure • Ways of managing relationships where it is not possible to meet the needs and/or expectations of others, e.g., exploring possible alternative solutions, informing manager/others, providing a clear explanation etc. • How to approach and resolve challenges that arise in relationship with others

Assessor Guidance	
1.	Learners should describe the typical needs and expectations of at least three different colleagues who perform different roles in a sales team with supporting examples. At least two stakeholders should be covered when explaining the needs and expectations of others
2.	Learners should identify the needs and expectations of at least one colleague and one stakeholder that they are currently working with. They should provide evidence that they perform under pressure as part of a team, e.g., project plans, meeting deadlines, witness testimony from colleagues, summaries of challenges faced and how they were overcome successfully etc. Evidence should be provided that demonstrates that at least two relationships are productive and professional, e.g., copies of email correspondence, successful sales because of joint working etc. Learners must give at least one example of experiencing challenges in a relationship with a colleague and detail the actions that they took to resolve the situation. Supporting evidence should confirm that the situation took place, e.g., a confirmation from their line manager, a supporting paragraph from the colleagues etc.

L3L2 Understand Remote Working

Unit Title	L3L2 Understand Remote Working	
Level	3	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the nature of remote work	1.1	Define remote working
	1.2	List the benefits of remote working for the organisation and individual sales professionals
	1.3	Outline the potential challenges of remote working for sales professionals
	1.4	Describe approaches that can be used to overcome remote working challenges
2. Understand remote working practices for productivity and wellbeing	2.1	Describe the digital technology that supports remote working
	2.2	Explain the work practices that support successful remote working and wellbeing

Additional Information	
Unit purpose and aims	To enable learners to understand. They will also develop their knowledge remote working practices for productivity and wellbeing.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standards.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• What is meant by remote working and how definitions and terms used by different organisations vary • The benefits of remote working for organisations, e.g., increased productivity, increased employee satisfaction and morale, cost savings, reduced employee turnover, access to a wider talent pool, reduced carbon footprint etc. • The benefits of remote working for individual employees, e.g., improved work-life balance, reduced commuting time and costs, increased productivity, reduced stress levels, increased job satisfaction, improved mental and physical health, reduced carbon footprint, increased learning and development opportunities etc. • The types of challenges that sales professionals may face when working remotely, e.g., lack of meaningful social interaction with colleagues, being distracted from work, technology problems etc.
2.	• The digital technology that can support remote working, e.g., cloud computing, video conferencing, project management tools, collaboration tools, communication tools, security tools, virtual private networks (VPNs), remote desk software, whiteboard apps etc. • The range of work practices that support successful remote working and wellbeing, e.g., setting clear expectations and parameters, establishing a dedicated

	workspace, managing time, regular communication, using digital technology tools, allocating time for wellbeing etc.

Assessor Guidance	
1.	Learners should provide a definition of remote working in their own words by drawing on how the term has been defined by different organisations. They should list at least three benefits of remote working for the organisation, and at least three benefits for remote working from an employee's perspective. Learners should outline at least two potential challenges that sales professionals who work remotely may face and describe approaches that can be used to overcome these challenges.
2.	Learners should describe at least three types of digital technology that can support remote working, giving examples of how each is used. They should explain at least three work practices that support successful remote working and wellbeing.

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L3L3 Solving Problems

Unit Title	L3L3 Solving Problems	
Level	3	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to define a problem	1.1	Describe typical workplace problems related to the sales function
	1.2	Explain how to define the nature, scope and impact of a problem
2. Be able to use data and information to solve a problem	2.1	Define a current workplace problem
	2.2	Gather data and information about a problem
	2.3	Identify the root cause of a problem using an analysis tool
	2.4	Generate options to address a problem
3. Be able to use a decision-making tool to assess the options to solve a problem	3.1	Assess the options to address problems using a weighted decision matrix
	3.2	Seek approval from management to progress with the chosen solution
4. Be able to implement and evaluate a chosen solution to address a problem	4.1	Implement the chosen solution for the problem
	4.2	Evaluate the effectiveness of the implemented option

Additional Information	
Unit purpose and aims	To enable learners to understand how to define a problem. They will be able to use data and information to solve a problem. Learners will use a decision-making tool to assess the options to solve a problem. They will implement and evaluate their chosen solution.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 3 IT Technical Salesperson Apprenticeship</u>** **S4** Problem solving: applies structured techniques for troubleshooting, problem solving and analyses problems by selecting the appropriate tools and techniques in line with organisation guidance when dealing with sales as well as routine tasks **B1** Logical and creative thinking skills **B3** Ability to think analytically and to solve problems
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The typical workplace problems that occur in the sales function, e.g., poor customer service, inefficient sales process, poor lead generation process, poor communication between teams, unrealistic targets, delays in delivery of products/services, customer dissatisfaction etc.

	• What is meant by the nature of a problem; the underlying factors that contribute to a problem such as systemic factors (software problem, organisational process/procedure), human factors, e.g., the problems caused by the actions and decisions of people, and environmental factors • The scope and impact of a problem, the extent to which it affects organisations, e.g., the number of people affected, the severity of the problem, the duration of the problem (is it new, or it is reoccurring), cost in terms of financial losses and reputation etc.
2.	• How to gather data and information to help to investigate and analyse a workplace problem • Types of data and how to gather it: quantitative and qualitative • The techniques that can be used to determine the root cause of a problem, e.g., 5-whys, fishbone • The approaches that can be used to generate options to solve problems, e.g., team brainstorming, mind mapping, seeking feedback from people affected etc. • The managers responsible for approving the chosen solution and when/how to approach them for sign off
3.	• How to assess the different options to resolve problems using a weighted decision matrix • How to implement the chosen option, e.g., gaining sign-off from relevant people, action planning, communicating changes, taking action, supporting others, reviewing progress etc. • Ways that the effectiveness of the implemented option can be evaluated to check if the problem has been partially or fully resolved

Assessor Guidance	
1.	Learners should describe at least two typical workplace problems that occur during organisational sales functions activities. They should explain what is meant by the 'nature, cope and impact of a problem, giving an example to support their points.
2.	Learners should define a current workplace problem in their organisation's sales function, stating it's nature, scope and impact clearly. They should gather both quantitative and qualitative data and information related to the problem, from at least three sources. Learners must provide evidence of using an analysis tool to determine the root cause of the problem. At least three options for addressing the problem should be generated based on the analysis of data and information.
3.	Using the problem identified in LO2, learners should assess the solution options that they have generated using a weighted decision matrix. They should evidence that they have sought approval from management to progress with their chosen solution.
4.	Learners should provide evidence of taking action to implement the solution that they identified in LO3, including the involvement of at least one other person. Learners should track their actions when implementing the chosen solution to evaluate if it is resolving the problem and note any further actions if required.

L4L4 Participating in Coaching and Mentoring

Unit Title	L4L4 Participating in Coaching and Mentoring	
Level	4	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand the purpose of sales coaching and mentoring in organisations	1.1	Analyse the differences between coaching and mentoring
	1.2	Evaluate the benefits of sales coaching and mentoring for individuals and organisations
	1.3	Explain how coaching and mentoring link to organisational sales objectives
2. Understand the processes and people involved in successful sales coaching and mentoring	2.1	Explain situations when a sales professional should seek mentoring and coaching
	2.2	Evaluate the knowledge, skills and characteristics required by coachees and mentees
	2.3	Evaluate the knowledge, skills and characteristics required by coaches and mentors
3. Be able to engage in personal coaching or mentoring to improve performance	3.1	Agree a contract for coaching or mentoring sessions with a colleague/tutor
	3.2	Implement the actions agreed during coaching and mentoring sessions
4. Be able to engage in personal coaching and mentoring	3.3	Evaluate improvements in personal performance due to coaching or mentoring sessions

Additional Information	
Unit purpose and aims	To enable learners to understand the purpose of sales coaching and mentoring in organisations. They will understand the processes and people involved in successful sales coaching and mentoring. Learners will engage in coaching or mentoring sessions with a colleague/tutor to improve their performance.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standards.
Location of the unit within the subject/sector classification system	15.4 – Marketing and Sales
Indicative Content	
1.	• Definitions of coaching and mentoring • The similarities and differences between coaching and mentoring, e.g., duration of relationship, short/long term goals, training required, experience, formality, directive/non-directive, contractual arrangements, working relationship etc • The benefits for individuals, e.g., individual development, improves performance, builds relationships, provides career development opportunities etc.

	• The benefits for organisations, e.g., develops performance, increase revenue, improves organisational culture, demonstrates commitment to individuals, improves engagement, embeds solution culture, increases staff retention etc. • Organisational expectations of the impact of coaching and mentoring • How developing individuals using coaching and mentoring supports the achievement of sales objectives
2.	• The situations when a sales professional may find coaching and mentoring helpful, e.g., when new to a role, after a promotion, when offering a new product/service • The activities that support effective coaching and mentoring, e.g., set goals, plan activities, monitor progress, review outcomes • The knowledge that coachees and mentees require, e.g., coaching/mentoring processes and approaches – what is involved in the relationship, how to select/request a suitable coach/mentor, etc. • The skills that coachees and mentees require, e.g., communication, record keeping, action planning, commitment etc. • The characteristics that coachees and mentees require, e.g., openness, growth mindset, change readiness, listening • The knowledge that coaches and mentors require, e.g., models, the tools they can access, the techniques that support effective sessions, records, legal requirements for confidentiality etc. • The skills that coaches and mentors require, e.g., communication, questioning, active listening, ability to challenge, constructive feedback, record keeping etc. • The characteristics that coaches and mentors require, e.g., empathetic, curious, inspirational, positive, persistent, open, innovative etc.
3.	• The importance of 'contracting' in the coaching/mentoring process and ways to do this formally and informally • Why coaching and mentoring plans are important • What should be included in a coaching and mentoring plan, e.g., initial conversations and contract, how development goals will be agreed, the resources and tools provided, how progress will be measured, the support provided, the dates and duration of sessions, who will be consulted, signatures etc. • Other people that may be involved in planning and supporting coaching and mentoring and how to work with them

Assessor Guidance	
1.	Learners should analyse at least three differences between coaching and mentoring and provide workplace examples to support their points. When evaluating the benefits, learners should address individuals and organisations separately to demonstrate the differences. Learners should ideally use their own organisation's sales objectives to explain how coaching and mentoring could contribute to their achievement. If they are not currently in a sales role, a realistic set of organisational sale objectives should be provided for them to use.
2.	Learners should explain at least one situation where coaching should be sought, and at least one situation when mentoring is helpful for a sales professional.

	Learners should focus on either a coachee or a mentee for 2.2, then address the knowledge, skills and characteristics separately, and include at least two examples for each (six in total). Learners should focus on either a coach or a mentor for 2.3, then address the knowledge, skills and characteristics separately, and include at least two examples for each (six in total).
3.	Learners need to participate in at least two coaching OR mentoring sessions to develop their sales knowledge and skills. These can take place in their workplace, or in the training environment as part of a realistic simulated activity. Sessions should last for at least 30 minutes each. A contract should be agreed at the start of the sessions and should be documented formally or informally. Learners should take notes during their coaching or mentoring sessions and agree actions that they implement between the sessions. Learners should use their completed actions and session notes to evaluate the knowledge and skills that they gained because of the coaching/mentoring. They should explore how the knowledge and skills gained will impact them as sales professional in the future. If learners are currently working as sales professionals, they may like to give examples of what they have done differently in their role following the coaching or mentoring sessions.

L4L6 Understanding Leadership Styles and Motivation

Unit Title	L4L6 Understanding Leadership Styles and Motivation	
Level	4	
Credit Value	2	
Guided Learning Hours	10	
Learning Outcomes	**Assessment Criteria**	
1. Understand how leadership styles impact organisational performance	1.1	Explain the difference between leadership and management
	1.2	Analyse a range of leadership styles
	1.3	Evaluate the impact that leadership styles have on performance
2. Understand how to motivate others to perform at their best	2.1	Explain how to apply a motivation theory in the sales environment
	2.2	Evaluate how motivational factors apply to different situations, teams and individuals
	2.3	Analyse the role that leaders play in motivating others

Additional Information	
Unit purpose and aims	To enable learners to understand how leadership styles impact organisational performance and how to motivate others to perform at their best.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standard.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The difference between leadership and management and how they contribute to effective organisational performance • Characteristics of leaders • The range of leadership styles, e.g., situational, visionary, transformational, autocratic, transactional, coaching, democratic, laissez-faire, charismatic, supportive, servant etc. • How to adopt different leadership styles to suit the situation, e.g., Tannenbaum and Schmidt's model • The potential impact of different leadership styles on individuals and performance
2.	• The critical importance of teams and individuals being motivated and committed to their objectives • Different theories related to employee motivation, e.g., Maslow's Hierarchy of Needs, MacGregor's Theory X Y, Herzberg's Two Factor Theory, Vroom's Expectancy Theory, McClelland's 3-Needs Theory • The motivational factors that influence others, e.g., safety, security, material rewards, sense of belonging, common team purpose, respect, empathy, recognition, involvement in decision making, opportunities for self-development, career progression etc. • How to select and use appropriate motivational factors • Giving feedback on performance to motivate individuals

	• How motivators differ between colleagues how to meet their needs

Assessor Guidance	
1.	Learners should provide definitions of leadership and management from at least two sources and explain their understanding of the differences using relevant workplace examples. At least four different leadership styles should be analysed, with reference to relevant theories. Workplace examples should support the points made about the impact of leadership styles on performance.
2.	Learners should explain at least two different motivation theories with sufficient detail and examples to demonstrate that they know how to apply each in practice. For 2.2, at least three motivational factors should be addressed, with examples related to at least two workplace situations. Both teams and individuals should be covered. In their analysis, learners should explore how leaders can motivate others to perform successfully, giving at least three examples of how this works in practice. 'Leaders' may be interpreted as line managers or colleagues leading a project/bid.

Qualification Unit Specifications – Self

L2S3 Understand Legal, Regulatory and Ethical Frameworks

Unit Title	L2S3 Understand Legal, Regulatory and Ethical Frameworks	
Level	2	
Credit Value	2	
Guided Learning Hours	10	
Learning Outcomes	**Assessment Criteria**	
1. Understand the laws and regulatory frameworks that affect selling	1.1	Describe the laws that need to be considered by an organisation when selling
	1.2	Describe the regulatory frameworks related to selling
	1.3	Outline the potential consequences of non-compliance with the law for individuals and organisations
2. Understand ethical selling practices	2.1	Describe the organisational benefits of ethical selling
	2.2	Explain the behaviours that ethical sales professionals demonstrate
	2.3	Outline the potential consequences of a sales professional acting unethically for individuals and organisations

Additional Information	
Unit purpose and aims	To enable learners to understand the laws and regulatory frameworks that affect selling. They will also develop their knowledge of ethical selling practices.
Details of the relationship between the unit and apprenticeship standards	**Level 3 IT Technical Salesperson Apprenticeship** **K8** Understands the principles and ethics of sales, recognising the importance of delivering value to the customer **S7** Interprets and follows: • Health and safety legislation to securely and professional work productively in the work environment • Data Protection Act 2018 • Sales of Goods Act 1979
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The main UK laws that relate to selling, e.g., Data Protection Act (2018), Consumer Rights Act (2015), health and safety, sector/product specific requirements etc. • The organisational responsibilities for ensuring that legal requirements are met with the products and services offered • How to ensure that sales professionals are aware of their responsibilities related to the law and comply with the requirements in all their sales activities • The regulatory frameworks related to selling • The consequences for organisations who do not comply with the law, e.g., industry watchdogs' investigations, fines, loss of reputation, loss of business etc.

	• The consequences for individual sales professionals who do not comply with the law, e.g., dismissal, loss of reputation, imprisonment etc.
2.	• The organisational benefits of ethical selling, e.g., builds customer trust, loyalty, attracts investment, increased sales via customer loyalty, creates high employee pride and morale etc. • The ethical behaviours that sales professionals should demonstrate, e.g., honesty, build trust, fairness, clear communication etc. • Relevant codes of ethical conduct that define expected standards of professionalism, e.g., ISP's Code of Conduct • The consequences for organisations of unethical practices, e.g., loss of sales, reputational damage, high employee turnover, unable to recruit new employees etc. • The consequences for individual sales professionals who behave unethically

Assessor Guidance	
1.	Learners should list at least one UK law, and one regulatory framework, that affect selling and describe how these affect organisational responsibilities for each. When outlining the consequences of non-compliance with the law, learners should cover at least one consequence for the organisation and at least one consequence for a sales professional.
2.	Learners should describe at least three organisational benefits of ethical selling. They should explain at least three behaviours that ethical sales professionals should demonstrate. When outlining the consequences of unethical practices, learners should cover at least one consequence for the organisation and at least one consequence for a sales professional.

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L3S1 Personal Motivation and Sales Performance

Unit Title	L3S1 Personal Motivation and Sales Performance	
Level	3	
Credit Value	2	
Guided Learning Hours	10	
Learning Outcomes	**Assessment Criteria**	
1. Understand how personal motivation affects sales performance	1.1	Evaluate the factors that affect personal motivation
	1.2	Explain the link between personal motivation and sales performance
2. Be able to improve personal motivation and sales performance	2.1	Create a personal development plan to improve sales performance using a motivation theory
	2.2	Implement the personal development plan
	2.3	Review and update the personal development plan

Additional Information	
Unit purpose and aims	To enable learners to understand how personal motivation affects sales performance. Learners will improve their personal motivation and sales performance.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standards.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The different theories related to employee motivation, e.g., Maslow's Hierarchy of Needs, MacGregor's Theory X Y, Herzberg's Two Factor Theory, Vroom's Expectancy Theory, McClelland's 3-Needs Theory • The motivational factors that affect personal motivation, e.g., safety, security, material rewards, sense of belonging, common team purpose, respect, empathy, recognition, involvement in decision making, opportunities for self-development, career progression etc. • Why personal motivation is important to achieve sales goals and the impact that lack of motivation can have on an individual, their colleagues/team and the organisation
2.	• Why personal development plans are important • How to select a relevant theory of motivation and draw on its key features to create a development plan • The components of a development plan, e.g., development goals, resources required, how progress will be measured, target dates etc. • How to implement and review a personal development plan using evidence and feedback from others, e.g., peers, line manager, customers etc.

Assessor Guidance

1.	Learners should evaluate at least four factors that affect personal motivation giving relevant examples to support their points. They can choose to consider their own personal motivation factors or provide a more general evaluation. To explain the link between personal motivation and sales performance, learners should provide at least two workplace examples to illustrate their understanding
2.	Learners should outline the motivation theory that they have used to create their plan and briefly explain why they used it in the way they did. (e.g., if using McClelland, they could explain why they are predominantly motivated by 'power', then write suitable development objectives related to this motivator). The plan should include at least three personal development objectives. The plan must be implemented and updated when at least one objective is reviewed and achieved. It is expected that a minimum of one month is required to achieve an objective.

L3S2 Stress Management

Unit Title	L3S2 Stress Management	
Level	3	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand stressors and the impacts of stress in the working environment	1.1	Explain the difference between pressure and stress
	1.2	Summarise workplace and personal life stressors
	1.3	Describe how workplace stress impacts organisations and individuals
	1.4	Outline simple stress management techniques
2. Be able to use a practical technique to manage personal stress	2.1	Select a simple stress management technique
	2.2	Use a simple stress management technique
	2.3	Review the effectiveness of a simple stress management technique to manage personal stress
	2.4	State sources of support for managing personal stress

Additional Information	
Unit purpose and aims	To enable learners to understand stressors and the impacts of stress in the working environment. Learners will use a practical technique to manage personal stress.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standards.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The stress continuum model and key stages, e.g., ready, reacting, injured, ill • The range of workplace stressors, e.g., salary, excessive workloads, poor management, limited opportunities for growth or advancement, lack of challenge in work tasks, lack of support, lack of control over job-related decisions, conflicting demands, unclear performance expectations etc. • The range of personal life stressors, e.g., illness or injury, pregnancy, bereavement, becoming a parent, infertility, experiencing abuse, organising an event, everyday tasks, commuting, getting married/civil partnered, going through a break-up or divorce, family relationships, being a carer etc. • The ways that stress impacts on organisations, e.g., reduced productivity and efficiency, increased absenteeism, increased staff turnover, increased health care costs, damage to relationship, increased safety risks, decreased innovation and creativity, negative organisational reputation etc. • The ways that stress impacts on individuals, e.g., physical health problems, mental health illness, reduced performance, increased sick days, reduced job satisfaction, changes in personal lifestyle, etc.

	• Derailment – how personal career, performance or wellbeing may suffer under the demands and pressure of a new working context or more senior role • The range of simple stress management techniques that are available, e.g., breathing exercises, regular exercise, relaxation techniques, healthy eating, 'me' time, aromatherapy etc.
2.	• How to select a stress management technique for personal use • How to plan to use a stress management technique and implement it • How to establish personal stress level to create a baseline before implementing stress management techniques using online stress questionnaire(s) • How to review the effectiveness of a simple stress management technique, e.g., retaking online test, keeping a diary, daily wellbeing check-in scores etc. • The sources of support for managing personal stress, e.g., Mind, mobile apps etc.

Assessor Guidance	
1.	Learners should give at least two workplace examples to explain the difference between pressure and stress. They should summarise at least three workplace stressors and at least three personal life stressors. At least one example of how workplace stress impacts organisations should be described, and at least two examples of the impact of stress on individuals. At least three different stress management techniques should be outlined.
2.	Learners should select and use one stress management technique that they have described in AC1.4. They should provide evidence of how they implemented the technique in their daily activities over at least a one-month period, and review how effective it was for managing stress. The review should include a comparison of stress levels before using the stress management technique and afterwards. At least three sources of support for managing personal stress should be provided.

L3S3 Plan Professional Development

Unit Title	L3S3 Plan Professional Development	
Level	3	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the opportunities available for opportunities for professional development in the sales role	1.1	Explain why continuing professional development (CPD) is important for sales professionals
	1.2	Explain the opportunities available for professional development in sales roles
	1.3	Describe how to negotiate and agree personal development
2. Be able to create a personal professional development plan	2.1	Assess personal strengths and development needs in relation to a sales role
	2.2	Produce a personal development plan
	2.3	Implement the personal development plan to meet personal development objectives
	2.4	Review progress towards the achievement of personal development objectives

Additional Information	
Unit purpose and aims	To enable learners to understand the opportunities available for opportunities for professional development in the sales role. Learners will create a personal professional development plan based on an assessment of their strengths and development areas.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 3 IT Technical Salesperson Apprenticeship</u>** **S11** Is able to provide evidence to demonstrate where they have used appropriate tools and techniques to effectively plan and manage their time.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The reasons why continuing professional development (CPD) is important for sales professionals and the benefits that it has for individuals, teams and organisations • The range of development opportunities that are available to sales professionals at all levels of competence • The types of opportunities that sales professionals can access, e.g., in-house and external training, coaching, shadowing, self-study, mentoring, projects, professional bodies, volunteering, qualifications etc. • The ways that personal development opportunities can be negotiated
2.	• How to identify the sources of information that are available to understand sales role requirements, e.g., job descriptions, job specifications, competence frameworks, standards of performance etc.

	• The tools and techniques that can be used to assess personal strengths and development needs, e.g., personal SWOT analysis, gap analysis, online assessment tools such as ISP's Sales Competency Assessment (SCA), 360 feedback etc. • How to write SMART objectives based on identified needs (specific, measurable, achievable, realistic and time-bound) • The components of a professional development plan, e.g., objectives, target dates, activities, resources, people involved, progress tracking etc. • The different methods that can be used for personal development, e.g., open courses, internal e-learning, self-directed learning, webinars, podcasts, online videos, TED talks, massive open online courses (MOOCs), on the job training etc. • How to match learning needs and objectives with the opportunities available • Why it is important to review progress towards the achievement of goals regularly • How and when to review progress, and update development plans • The people who can help with progress reviews

Assessor Guidance	
1.	Learners should provide at least three examples to explain why CPD is important for sales professionals. They should explain at least three different opportunities that are available to support professional development. These may be linked to any level of sales role, and learners may choose to identify one entry level development activity, one development activity for experienced sales professionals and one development opportunity for sales managers. Learners should describe at least two ways that personal development can be negotiated.
2.	Learners should use a relevant source of information to define at least six criteria to assess themselves against. They might like to use a scoring system or scale when assessing their strengths and development areas. The personal development plan produced should be based on the findings of their assessment and include at least two SMART objectives, target dates, relevant opportunities selected, learning/development methods, support and resources required, measures of success etc. Learners should implement their plan and carry out development activities over at least a eight-week period, reviewing and updating records on at least a weekly basis.

L4S3 Continuing Professional Development (CPD)

Unit Title	L4S3 Continuing Professional Development (CPD)	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand continuing professional development (CPD)	1.1	Evaluate the range of learning and development opportunities for sales professionals
	1.2	Explain the importance of continuing professional development
	1.3	Explain how to identify individual learning and development needs
2. Be able to plan own continuing professional development (CPD)	2.1	Assess personal performance using data and feedback from others
	2.2	Specify personal development objectives based on the assessment of performance
	2.3	Create a CPD plan based on the specified learning objectives
	2.4	Implement the CPD plan and track progress
	2.5	Review the impact of the CPD implemented and confirm next steps

Additional Information	
Unit purpose and aims	To enable learners to understand continuing professional development and why it is important. Learners will assess their own development needs and create a plan for their continuing professional development (CPD).
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standards.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• Why continuing professional development is important • The current formal and informal development activities available and how to access them • The opportunities available to improve skills and behaviours as part of sales activities, e.g., coaching, mentoring, observing peers, meetings, projects, reading organisational product/service resources etc. • The learning and development opportunities available in-house for self-directed learning, e.g., induction resources, e-learning, discussion forums, job aids, books, magazines, podcasts, TED talks, YouTube videos, LinkedIn, free courses etc. • The development opportunities available from external providers, e.g., live online workshops, formal training programmes, qualifications, networking groups, conferences etc

	• The financial considerations related to selecting development opportunities, e.g., allocated training budget, price constraints per employee, budget year and spending etc. • The importance of selecting learning and development activities that suit individual preferences and working patterns
2.	• How to assess own strengths and development needs in relation to personal performance • How and who to seek feedback from related to sales performance, e.g., line manager, peers, colleagues, direct reports, customers etc. • The tools that are used to identify training needs, e.g., Training Needs Analysis (TNA); Developmental Needs Analysis (DNA), Skill Scans based on role competencies and job specifications, psychometric tests, quizzes etc. • How to match development opportunities against the desired competencies of the role • How behaviour, attitudes and mind-set can have a positive or negative impact on own sales performance • The tools that can be used to assess own development needs, e., skills audits; ISP Competency Framework, agreed targets, existing action plans etc. • How organisational and personal values can be used in the assessment of professional development needs • How to include career and wider personal aspirations when assessing develop needs • Why it is important to assess knowledge, skills, and behaviours • How to identify learning experiences that are mutually beneficial to self and organisation • How to specify own strengths/development areas in relation to a professional sales role • How to write SMART objectives linked to short, medium, and long-term goals • Linking own personal objectives to organisational objectives • The components of a development plan, e.g., objectives, priorities, target dates, review dates, resources required, costs, people involved, evaluation method etc. • How to ensure that professional development objectives are relevant to personal needs, the job role and organisation

Assessor Guidance	
1.	Learners should address at least two formal and at least two informal development activities in their evaluation. At least two workplace examples should be provided to explain why CPD is important for sales professionals. Learners should explain at least three ways that their own learning needs can be identified.
2.	Learners should self-assess and use at least two sources of data, and feedback from at least one other person to assess their own performance. They should then use the results of their assessment to specify and prioritise at least four learning objectives using the SMART model. Their CPD plan must be based on the objectives and include both formal and informal development activities.

	Their development plan should also include target dates, formal and informal development methods, support and resources required, measures of success etc. Learners should implement their plan and carry out development activities/tracking over at least a six-week period, updating records weekly. Their review should cover at least two impacts that are based on data and recommendations for next steps should be summarised.

L4S4 Self Management

Unit Title	L4S4 Self Management	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the impact of self-management on performance	1.1	Explain why self-management is important for sales professionals
	1.2	Analyse a range of self-management techniques that can be used to improve performance
2. Understand time management techniques and their benefits	2.1	Evaluate the benefits of time management for self and organisational performance
	2.2	Analyse a range of time management techniques
	2.3	Assess time management techniques to select an approach that aligns with personal work style
3. Be able to implement a time management technique	3.1	Use a time management technique to organise and prioritise own workload
	3.2	Evaluate the effectiveness of a time management technique to complete work tasks

Additional Information	
Unit purpose and aims	To enable learners to understand the impact of self-management and time management on performance. Learners will explore time management techniques, then implement their preferred technique to organise, prioritise, and complete their own activities.
Details of the relationship between the unit and apprenticeship standards	**Level 3 IT Technical Salesperson Apprenticeship** **B4** Ability to work independently and to take responsibility **B5** Can use own initiative **B6** A thorough and organised approach
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The reasons why self-management is important for sales professionals, e.g., to plan activities, define goals, recognise progress and achievements, motivate-self, balance sales efforts, create sales records, to inform future activities, evaluate own performance, build career progression opportunities etc. • The range of self-management techniques that can be used, e.g., self-motivation, goal alignment, prioritisation techniques, stress management, adaptability, decision making tools, continuing personal development etc. • The links between self-management techniques and personal/organisational performance

2.	• The benefits of time management, e.g., maximise personal productivity, accomplish tasks quicker, complete more tasks, prioritise tasks that have the most impact, enable tasks to be completed in a logical order, reduce stress, enable focused time, minimise procrastination, better work-life balance etc. • The range of time management tools and techniques available, e.g., to-do lists, productivity apps, voice recognition software, Pareto model (80/20), Pomodoro, Eisenhower Matrix, time blocking, GTD method (Allen), Rapid Planning Method (RPM) etc. • How to identify personal barriers to working productively to achieve tasks, e.g., procrastinating, feeling overwhelmed, lack of interest, leave to last minute, conflicting work and personal life priorities, easily distracted etc. • How to select a time management technique to match personal working style and barriers
3.	• How to put a time management technique into practice to manage own tasks • How to create criteria to measure the effectiveness of own time management before and after trying out a new time management technique • How to draw relevant conclusions from the experience of trying out a new time management technique

Assessor Guidance	
1.	Learners should explain what is meant by self-management and give at least three examples of why this is important for sales professionals. An analysis of at least three self-management techniques should be completed with examples for each of how these can be used in day-to-day sales activities
2.	The evaluation of time management benefits should address at least two benefits for an individual sales professional and two benefits for organisations. At least three time management tools/techniques should be analysed. The assessment for 2.3 should focus on the three time management tools/techniques that have been analysed in 2.2. Learners should measure how these match their own style of working and personal preferences to determine the most suitable personal approach to use.
3.	Learners should practise using the preferred management tool/technique identified in 2.3 in their work/activities. Ideally this will be a sales role, however other job roles may be used if they are agreed with the centre/training provider. To demonstrate how they have used the time management tool/technique, learners should create a learning log/portfolio that: • documents at least three occasions when they used the tool/technique • Summarises how well the technique worked (in terms of organising and prioritising activities), giving examples of what happened in practice • Outlines what they would do differently in the future when using the tool/technique.

L4S5 Contributing to an Inclusive Culture

Unit Title	L4S5 Contributing to an Inclusive Culture	
Level	4	
Credit Value	2	
Guided Learning Hours	10	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to demonstrate inclusive workplace behaviours	1.1	Analyse the role and responsibilities of a sales professional towards others
	1.2	Explain language that supports inclusive relationships in the workplace
	1.3	Evaluate inclusive workplace behaviours that sales professionals use
2. Be able to contribute to an inclusive organisational culture	2.1	Promote an inclusive workplace culture in sales activities
	2.2	Respond to team conflict and challenges demonstrating positive regard for others

Additional Information	
Unit purpose and aims	To enable learners to understand how to demonstrate inclusive workplace behaviours. Learners will contribute to an inclusive organisational culture during their sales activities.
Details of the relationship between the unit and apprenticeship standards	Not linked to the apprenticeship standard.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The role and responsibilities that sales professional have towards others, e.g., role modelling inclusivity, living organisational values, mentoring diverse talent, supporting flexible working, preventing discrimination and harassment, challenging inappropriate behaviour, promoting equality, diversity and inclusion, implementing relevant policies and procedures, developing best practice etc. • The role of equality, diversity and inclusion in workplace interactions in relation to organisational policy and legislation • The language that supports inclusive relationships with others, e.g., use of relevant pronouns, addressing people by their preferred names, thanking people for contributions, etc. • What is meant by unconditional positive regard, e.g., expressing empathy, support, and acceptance to someone, regardless of what they say or do. • The behaviours that sales professionals should demonstrate to show regard for others, e.g., impartial and non-judgemental treatment of others, fair and consistent decision-making, respect and appreciation, valuing differences, questioning own biases, constructive challenge, being an ally for marginalised groups, conflict resolution techniques, discretion/confidentiality, recognising and praising others' strengths etc.

2.	• The approaches that can be used to promote an inclusive workplace, e.g., informal and formal communication, addressing individual beliefs and opinions, overcoming custom and practice issues, dealing with conscious and unconscious bias, challenging poor practice, promoting culture change training and awareness, using real life events, pro-actively supporting colleagues and employees etc. • How teams in the workplace may differ from each other • How personal values can affect teams • Possible types of problem behaviour and causes of disagreement and conflict • How to deal with individual team member differences

Assessor Guidance	
1.	Learners should provide a broad analysis of the role and responsibilities of a sales professional in relation to respecting others. At least two specific workplace examples should support the points made. At least two examples of inclusive language should be provided with an explanation of the impact that this can have on individuals and their team. Learners should evaluate at least three inclusive behaviours and provide appropriate examples to support their points.
2.	Learners should provide evidence of at least three ways that they promote an inclusive workplace culture in their day-to-day sales activities. Examples should provide at least two examples of responding positively to conflicts /challenges at work that are related to inclusion.

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Appendix 2: Linking the L3 Diploma to the L3 IT Technical Salesperson Apprenticeship

Apprenticeship Training Providers who deliver the IT Technical Salesperson (L3) apprenticeship have an opportunity to register learners onto an optional diploma, irrespective of whether they use the ISP as their End Point Assessment Organisation (subject to them achieving Approved Centre Status with the ISP).

Where they chose to do this, Training Providers will be then required to submit a learner's Portfolio of Evidence and claim for a L3 diploma also upon completion of the apprenticeship practical training period. End point assessment is undertaken for the apprenticeship only and is not related in any way to achievement of the L3 diploma.

Where Training Providers, learners and employers opt into this optional diploma, it is the Training Providers responsibility to ensure that the evidence collated in the learner's Portfolio meets the requirements of the assessment criteria within this Qualification Specification.

Training Providers will need to provide evidence of robust assessment and internal quality assurance of the diploma Portfolio prior claiming competency and certification on behalf of the learner.

Subject to ISP's Direct Claim Status Policy, all diploma Portfolios with evidence assessment decisions and internal quality assurance is to be submitted to the ISP which will be subject to external quality assurance.

The 11 units listed on above are the units that an Apprentice must provide evidence for in their portfolio to be eligible to claim for the Level 3 Diploma in Sales (Apprenticeship Diploma).

Appendix 3 summarises how the Level 3 units map to all the knowledge, skills and behaviours (KSBs) of the apprenticeship.

End Point Assessment

Any claim for a diploma certificate will not affect, in any way, the apprenticeship End Point Assessment process and its outcome. Whilst it is possible and expected that Training Providers "dual map" single pieces of evidence to both the diploma and apprenticeship simultaneously, the diploma Portfolio is a standalone requirement to fulfil the requirements of this Qualification Specification and will be subject to separate external quality assurances processes by the ISP.

To achieve an apprenticeship grade, the Apprentice will always need to meet the requirements of apprenticeship Gateway, complete an End Point Assessment and meet the criteria outlined in the Apprenticeship End Point Assessment Plan – more details of which can be found here.

Appendix 3: Mapping of the IT Technical Salesperson (L3) apprenticeship to the Level 3 Units

The table below summarises all the apprenticeship knowledge (K), skills (S) and behaviours (B) that are covered within the Level 3 units (at Pass level).

Note that the Level 3 Diploma in Sales (Apprenticeship Diploma) qualification and its component Units listed here and above are not designed to cover all the KSBs that are assessed at End-Point Assessment.

The Apprenticeship Diploma has been designed to focus on core sales skills and provide support for portfolio building.

ISP mapping between the IT Technical Salesperson Apprenticeship and L3 Diploma has been provided for guidance purposes only. It is the Provider's responsibility to ensure the way you design, deliver and assess the diploma covers all requirements of each individual unit, learning outcomes and assessment criteria.

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	KSB
L/650/7899	L3B1	Understand Sales Communication	K7: Understands how to communicate using the appropriate language and terminology for audience and cultural awareness S1: Communication B8: Ability to communicate effectively in a variety of situations
R/651/0345	L3B5	Access and Analyse Sales Information	S3: Data Security
T/651/0346	L3C1	Prospect for New Business	K9: Understands the sales life cycle, techniques & processes S5: Assesses and qualifies sales leads
Y/651/0347	L3C2	Overcome Sales Objections	K10: Understands how to negotiate, handle objections and close sales K11: Understands the business product(s) they are responsible for selling including the relevant vendor product(s) as selected by the employer S8: Sales process
A/651/0348	L3C3	Negotiate and Close Sales	K11: Understands the business product(s) they are responsible for selling including the relevant vendor product(s) as selected by the employer S8: Sales process
D/651/0349	L3C4	Plan Sales Activities	K9: Understands the sales life cycle, techniques & processes
J/651/0350	L3C5	Sales Pipeline Management	S10: Database and Campaign Management
K/651/0351	L3C6	Understand Customer Behaviours	S2: Customer Experience B2: The ability to interact effectively and professionally with a range of different types of customer
L/651/0352	L3L1	Developing Relationships	S6: Project management B7: Ability to work with a range of internal and external people

			B9: Maintain productive, professional and secure working environment
R/651/0354	L3L3	Solving Problems	S4: Problem solving B3: Ability to think analytically and to solve problems
Y/651/0356	L3S3	Plan Professional Development	S11: Context / CPD

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