ISP Level 4 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	26/05/2023	Draft for review. Circulated by KA
V0.2 (DH)	05/07/2023	Unit specifications added. Formatting changes New ISP logo added
V0.3 (DH)	17/07/2023	Added UANs from Ofqual portal. Update name of one Award to "Level 4 Award in Using Digital Technologies and Data for Sales"
V0.4 (KA)	04/12/2023	Removed reference to 'Achievement Logs' p16. Updated L4B4 Indicative Content and Assessor Guidance for LO2.
V0.5 (DH)	19/02/2024	Finalised all QAN & UAN – added to Ofqual RQF. Formatting and content changes.
V1.0 (DH	07/03/2024	Final version published to RQF
V1.1 (SG)	06/05/2025	Corrections to some UANs. Updated branding.

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 4 Qualifications

There are a range of ISP qualifications available at Level 4:

- 18 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
Level 4 Award in Developing Commercial and Financial Acumen	610/3751/5	2	10	20
Level 4 Award in Sales Strategy and Planning	610/3752/7	3	15	30
Level 4 Award in Market Segmentation and Differentiation	610/3753/9	6	30	60
Level 4 Award in Building and Maintaining Relationships	610/3754/0	3	15	30
Level 4 Award in Partnering and Collaborative Selling	610/3755/2	3	15	30
Level 4 Award in Using Digital Technologies and Data for Sales	610/3756/4	6	30	60
Level 4 Award in Finding and Qualifying New Prospects	610/3757/6	4	20	40
Level 4 Award in Preparing and Presenting Sales Solutions	610/3758/8	5	20	50
Level 4 Award in Developing Value Propositions	610/3759/X	3	15	30
Level 4 Award in Competitive Bidding	610/3760/6	3	15	30
Level 4 Award in Negotiating and Closing Sales	610/3761/8	5	20	50
Level 4 Award in Meeting Commitments and Proving Value	610/3762/X	3	15	30
Level 4 Award in Pipeline Management and Forecasting	610/3763/1	3	15	30
Level 4 Award in Customer Focus	610/3764/3	3	15	30
Level 4 Award in Account Management Principles	610/3765/5	6	30	60
Level 4 Award in Understanding Continuous Improvement	610/3766/7	3	15	30
Level 4 Award in Developing Personal Resilience	610/3767/9	5	20	50

Level 4 Award in Using Legal, Regulatory and Ethical Frameworks	610/3768/0	5	20	30
Level 4 Certificate in Professional Sales	610/3769/2	Minimum 13 Maximum 36	65 to 184 hours	130 to 369 hours
Level 4 Diploma in Professional Sales	610/3770/9	Minimum 37	185 hours +	370 hours +
Level 4 Diploma in Executive Professional Sales (Apprenticeship Diploma)	610/3771/0	38	175 hours +	380 hours +

Description & Target Audience

The ISP Level 4 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 4 Award qualifications can progress on to the Level 4 Certificate qualifications. They can then progress onto the ISP Level 4 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 5 qualifications. They can also progress using their CPD programme or onto other relevant qualifications e.g., Sales Executive Apprenticeship (Level 4).

Qualification Structures – Awards, Certificates and Diplomas in Professional Sales

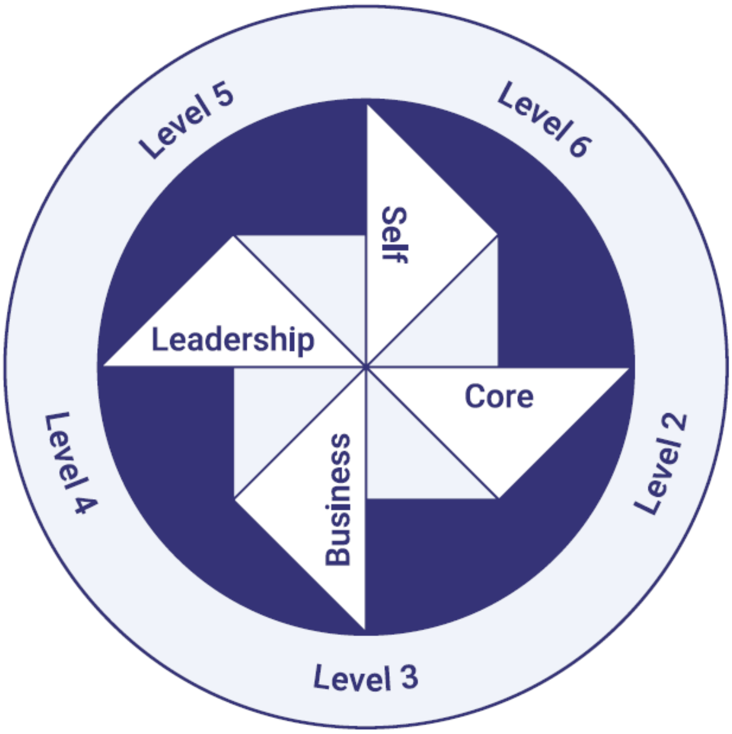
All Level 4 qualifications are constructed using a combination of units from each quadrant of ISP's Capability Framework (see image below).

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 4 Competencies are represented as **Units** within this Level 4 Qualification Specification.



Delivering the Level 4 qualifications

Qualification Structures - Awards

Level 4 Award qualifications are available for one- and two-unit qualifications in the combinations shown below:

Level 4 Award in Developing Commercial and Financial Acumen

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/650/7900	L4B1	Developing Commercial and Financial Acumen	4	10	20	2

Level 4 Award in Sales Strategy and Planning

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
D/650/7901	L4B2	Sales Strategy and Planning	4	15	30	3

Level 4 Award in Market Segmentation and Differentiation

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
F/650/7902	L4B3	Segmentation in Consumer and Business Markets	4	15	30	3
M/650/7907	L4B8	Differentiate in a competitive market	4	15	30	3

Level 4 Award in Building and Maintaining Relationships

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
H/650/7903	L4B4	Build and Maintain Sales Relationships	4	15	30	3

Level 4 Award in Partnering and Collaborative Selling

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/650/7904	L4B5	Partnering and Collaborative Selling	4	15	30	3

Level 4 Award in Using Digital Technologies and Data for Sales

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
K/650/7905	L4B6	Use Digital Technologies	4	15	30	3
L/650/7906	L4B7	Using Data to Gain Insights	4	15	30	3

Level 4 Award in Finding and Qualifying New Prospects

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/650/7913	L4C1	Finding and Qualifying New Prospects	4	20	40	4

Level 4 Award in Preparing and Presenting Sales Solutions

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/650/7913	L4C2	Prepare and Present Sales Solutions	4	20	50	5

Level 4 Award in Developing Value Propositions

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/650/7915	L4C3	Develop Value Propositions	4	15	30	3

Level 4 Award in Competitive Bidding

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
M/650/7916	L4C4	Competitive Bidding	4	15	30	3

Level 4 Award in Negotiating and Closing Sales

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
R/650/7917	L4C5	Negotiate and Close Sales	4	20	50	5

Level 4 Award in Meeting Commitments and Proving Value

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
T/650/7918	L4C6	Meet Commitments and Prove Value	4	15	30	3

Level 4 Award in Pipeline Management and Forecasting

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
Y/650/7919	L4C7	Pipeline Management and Forecasting	4	15	30	3

Level 4 Award in Customer Focus

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
Y/650/7919	L4C8	Customer Focus	4	15	30	3

Level 4 Award in Account Management Principles

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
H/650/7921	L4C9	Principles of Account Management	4	30	60	6

Level 4 Award in Understanding Continuous Improvement

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/650/7922	L4L1	Understand Continuous Improvement	4	15	30	3

Level 4 Award in Developing Personal Resilience

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/650/7922	L4S1	Developing Personal Resilience	4	20	50	5

Level 4 Award in Using Legal, Regulatory and Ethical Frameworks

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/650/7931	L4S2	Using Legal, Regulatory and Ethical Frameworks	4	20	30	5

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 Competency Framework.

Learners can select Level 3 and Level 5 unit options as part of the Certificate and Diploma qualifications as these support progression across different levels.

To achieve a Certificate, learners must pass:

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

Note that at this level, all LEADERSHIP units are all optional.

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 SELF unit

Note that at this level, all LEADERSHIP units are all optional.

To achieve an Apprenticeship Diploma, learners must pass:

- 38 credits
- All 11 Units are mandatory with no optional units available
- All units as prescribed below

Level 4 Diploma in Executive Professional Sales (Apprenticeship Diploma)

To achieve the Level 4 Diploma in Executive Professional Sales (Apprenticeship), 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**
A/650/7900	L4B1	Developing Commercial and Financial Acumen	4	20	10	2
H/650/7903	L4B4	Build and Maintain Sales Relationships	4	30	15	3
J/650/7904	L4B5	Partnering and Collaborative Selling	4	30	15	3
K/650/7905	L4B6	Use Digital Technologies	4	30	15	3
L/650/7906	L4B7	Using Data to Gain Insights	4	30	15	3
K/650/7914	L4C2	Prepare and Present Sales Solutions	4	50	20	5
R/650/7917	L4C5	Negotiate and Close Sales	4	50	20	5
H/650/7930	L4S1	Developing Personal Resilience	4	50	20	5
J/650/7931	L4S2	Using Legal, Using Legal, Regulatory and Ethical Frameworks	4	30	15	3
L/650/7933	L4S4	Self-Management	4	30	15	3
K/650/7932	L4S3	Continuing Professional Development (CPD)	4	30	15	3
		TOTAL		**380**	**175**	**38**

Note that the Level 4 Diploma in Executive Professional 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.

Institute of Sales Professionals

Overview of units

BUSINESS units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/650/7899	L3B1	Understand Sales Communication (Level 3 unit)	3	15	30	3
A/650/7900	L4B1	Developing Commercial and Financial Acumen	4	10	20	2
D/650/7901	L4B2	Sales Strategy and Planning	4	15	30	3
F/650/7902	L4B3	Segmentation in Consumer and Business Markets	4	15	30	3
H/650/7903	L4B4	Build and Maintain Sales Relationships	4	15	30	3
J/650/7904	L4B5	Partnering and Collaborative Selling	4	15	30	3
K/650/7905	L4B6	Use Digital Technologies	4	15	30	3
L/650/7906	L4B7	Using Data to Gain Insights	4	15	30	3
M/650/7907	L4B8	Differentiate in a competitive market	4	15	30	3

CORE units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/650/7913	L4C1	Finding and Qualifying New Prospects	4	20	40	4
K/650/7914	L4C2	Prepare and Present Sales Solutions	4	20	50	5
L/650/7915	L4C3	Develop Value Propositions	4	15	30	3
M/650/7916	L4C4	Competitive Bidding	4	15	30	3
R/650/7917	L4C5	Negotiate and Close Sales	4	20	50	5
T/650/7918	L4C6	Meet Commitments and Prove Value	4	15	30	3
Y/650/7919	L4C7	Pipeline Management and Forecasting	4	15	30	3
F/650/7920	L4C8	Customer Focus	4	15	30	3
H/650/7921	L4C9	Principles of Account Management	4	30	60	6

LEADERSHIP units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/650/7922	L4L1	Understand Continuous Improvement	4	15	30	3
K/650/7923	L4L2	Contributing to Sales Talent Selection and Growth	4	30	60	6
L/650/7924	L4L3	Understanding Compensation Plans	4	10	20	2
M/650/7925	L4L4	Participating in Coaching and Mentoring	4	20	40	4
R/650/7926	L4L5	Managing Change	4	30	60	6
T/650/7927	L4L6	Understanding Leadership Styles and Motivation	4	10	20	2
Y/650/7928	L5L5	Contributing to Organisational Innovation (Level 5 unit)	5	15	30	3

SELF units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/650/7929	L3S1	Personal Motivation and Sales Performance (Level 3 unit)	3	10	20	2
H/650/7930	L4S1	Developing Personal Resilience	4	20	50	5
J/650/7931	L4S2	Using Legal, Regulatory and Ethical Frameworks	4	15	30	3
K/650/7932	L4S3	Continuing Professional Development (CPD)	4	15	30	3
L/650/7933	L4S4	Self-Management	4	15	30	3
M/650/7934	L4S5	Contributing to an Inclusive Culture	4	10	20	2
R/650/7935	L4S6	Understanding and Building Agility	4	15	30	3

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 Provider's 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 contains indicative content and assessor guidance to explain the depth 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 (UAN)
- 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.

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Qualification Unit Specifications – Business

L3B3 Understand Sales Communication

Unit Title	L3B3 Understand Sales Communication	
UAN	L/650/7899	
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	**<u>Level 3 IT Technical Salesperson Apprenticeship</u>** **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.

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L4B1 Developing Commercial and Financial Acumen

Unit Title	L4B1 Developing Commercial and Financial Acumen	
UAN	A/650/7900	
Level	4	
Credit Value	2	
Guided Learning Hours	10	
Learning Outcomes	**Assessment Criteria**	
1. Understand the relationship between sales activities, and commercial and financial acumen	1.1	Evaluate how commercial and financial acumen underpin professional sales
	1.2	Describe the process for effectively communicating with prospects by gaining a thorough understanding of their financial and commercial objectives
	1.3	Describe methods for engaging in informed discussions to reach mutual agreement on credit limits, repayment terms, cash flow, margins, and pricing
2. Be able to assess the financial viability of an organisation	2.1	Analyse the commercial landscape and the financial elements of an organisation
	2.2	Assess the financial viability of a prospect to propose contractual terms that benefit both parties

Additional Information	
Unit purpose and aims	To enable learners to understand the relationship between sales activities, and commercial and financial acumen. Learners will assess the financial viability of an organisation to propose relevant contractual terms.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **K5.1** Is able to describe the principles of finance for sales, profit & loss, return on investment and budgeting and provide at least two examples of how they have used their understanding of financial principles in customer conversations. **K5.2** Is able to describe at least two different types of cost on the business and how they impact profitable performance. **K5.3** Using at least two examples, is able to describe the impact of any discount or variation in terms they are permitted to offer, and how this has impacted on their personal targets, as well as the wider implication to the business as a whole.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• Definitions of what is meant by commercial and financial acumen and how they differ • The principles of finance for sales, profit & loss, return on investment and budgeting • Different types of cost on the business and how they impact profitable performance

	• How commercial and financial acumen impacts the sales role and performance • Why it is important to link to a prospect’s financial and commercial objectives during sales conversations • How to identify suitable credit limits, repayment terms, cash-flow, margins and pricing • The impact of any discount or variation in terms they are permitted to offer • How discount or variation in terms impact personal targets and the wider organisation • The potential impacts if credit limits, repayment terms, cash-flow, margins and pricing are inappropriate
2.	• Ways that the financial landscape can be analysed • The main areas of organisational financial health that should be examined, e.g., liquidity, solvency, profitability, and operating efficiency • How to gather information about the financial viability of a prospect • How to agree financial terms that benefit both parties • The implications of agreeing contractual terms that is biased in favour of one party

Assessor Guidance	
1.	Learners should explore the differences between commercial and financial acumen, giving at least two examples of how these apply to an organisation and the sales function. They should explain how to build a conversation with a specific prospect based on their financial and commercial objectives. Learners should demonstrate a deep understanding of the customer variations related to agreeing credit limits, repayment terms, cash-flow, margins and pricing. A relevant organisation should be used to illustrate learners understanding, either a real prospect or one provided by the centre.
2.	Learners should analyse the main financial elements of an organisation and give examples related to one organisation. They should carry out a financial viability assessment in relation to one prospect to propose mutually beneficial contract terms. A relevant organisation should be used to illustrate learners understanding, either a real prospect or one provided by the centre.

L4B2 Sales Strategy and Planning

Unit Title	L4B2 Sales Strategy and Planning	
UAN	D/650/7901	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to research and create a territory or portfolio sales plan	1.1	Explain the structure of a territory or portfolio sales plan
	1.2	Evaluate the insights needed to create a territory or portfolio sales plan
	1.3	Explain how to research a market or sector using analytical tools
2. Be able to develop a sales plan based on research	2.1	Define the assumptions for a sales plan based on research analysis
	2.2	Set goals/targets to deliver a sales plan in line with organisational sales strategies, objectives and processes
	2.3	Devise activities to convert sales goals into actions

Additional Information	
Unit purpose and aims	To enable learners to understand how to research and create a territory or portfolio sales plan using tools. Learners will develop a sales plan based on their research and assumptions.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **K1.1** Is able to describe their organisation's vision, values and capabilities. **K1.3** Is able to demonstrate how their plans and actions are in line with their organisation's sales strategies, objectives and processes. **S1.4** Is able to provide a territory plan (or an alternative plan aligned with their organisation's planning processes), explaining how they have applied pipeline management principles in order to create their plan and prioritise customers and activities.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• What is meant by a territory or portfolio sales plan • How to structure a territory or portfolio sales plan to meet individual and organisational needs • The rationale for how a territory or sales plan is structured, e.g., specific organisational requirements, nature of the mark/sector, good practice guidelines etc. • The insights required and the different sources for information available, e.g., Mintel, LexisNexis, Avention, etc. • The information that is relevant to an organisation's sales activities

	• The legal and regulatory constraints on information collection; primary and secondary data; focus groups; surveys; data information providers (); trade journals/newspapers • How to check data sources for validity, bias and completeness • The analytical tools that can be used for sales planning, e.g., statistical techniques (ratio and interval analysis, models such as regression or cluster analysis) • How, why and when tools contribute to sales planning and how to select an appropriate tool
2.	• Typical assumptions that are considered when developing a plan: e.g., the market conditions, resources available, potential barriers to sale, the existing and new product/service range available etc. • How to use research when developing a sales plan based on accurate analysis • How to write realistic targets and goals that are measurable • The types of activities that are used to convert goals into actions • The people that support and contribute to sales planning

Assessor Guidance	
1.	Learners should explain how territory or portfolio sales plans are structured giving examples of how these may differ between different organisations with reasons why. When evaluating the insights needed, learners should consider the different sources of information available internally and externally, and any legal and regulatory constraints. Learners should explain at least two tools as part of demonstrating their knowledge of a suitable market/sector research approach.
2.	Learners should ideally use research related to their own organisation when developing a sales plan. If learners are not currently in a sales role, a realistic organisational context should be provided for them to use. The research should include a summary of the organisation's vision, values and capabilities. The sales plan should include at least three goals/targets. The goals/targets set should be SMART and link clearly to the research findings. At least three activities should be included in the sales plan that clearly link to achievements of the defined goal/targets.

L4B3 Segmentation in Consumer and Business Markets

Unit Title	L4B3 Segmentation in Consumer and Business Markets	
UAN	F/650/7902	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand market segmentation	1.1	Analyse how markets are defined for sales purposes
	1.2	Explain how to map a market to select the level to segment
	1.3	Explain bases for segmentation in consumer and business markets
	1.4	Evaluate the benefits of market segmentation
	1.5	Explain the importance of monitoring and revising market segmentation
2. Be able to target market segments for a territory	2.1	Assess an organisation's business strategy and implications for target market
	2.2	Select target market segments based on objective criteria and a weighting/scoring technique
	2.3	Devise a sales structure to engage different market segments

Additional Information	
Unit purpose and aims	To enable learners to understand market segmentation. Learners will target market segments for a territory.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **K3.1** Is able to outline how their market may be segmented, including considering whether vertical, horizontal and/or geographic segmentation is appropriate. **K3.2** Is able to describe how their organisation's products and/or services are or may be positioned to best target specific market segments. **K3.3** Is able to describe how different strategies are or may be used to engage customers in different market segments.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The reasons for market segmentation • Organisational market and customer segmentation strategies • What can drive a segmentation model • The options and compromises in a segmentation model • How to identify the market most likely to buy a product/service and define their characteristics • The concept of market mapping

	• Bases for consumer market segmentation, e.g., geographic, demographic, size, psychographic, behavioural, personal characteristics, etc. • The Ideal Customer Profile (ICP), how to define, why used, alternatives and multiple profiles etc. • Bases for business market segmentation, e.g., by industry, demographic, operating characteristics, situational factors, purchasing approaches, marketplace ranking, supply chain, future sales potential, current sales etc. • How to measure viability of a segment • The criteria used to measure if a segment is a viable target • The benefits of segmentation, e.g., finance, brand, customer knowledge, efficient use of resources etc. • Reasons for establishing or changing sales territories/portfolios • Changes to models, risks and benefits, e.g., the benefits accrued by the client in increased expertise, possible disruption of new personnel where there are existing relationships
2.	• An organisation's strategy, vision, goals and objectives • How the organisation influences the choice of target market • Market assessment, e.g., use organisation criteria including external market information and sales forecasts, undertaking an investigation - techniques to evaluate sales territories, client base, competitor activity, cost of travel, business activity, take up etc. • Using PESTLE and/or SWOT analysis to understand the business environment and how this information feeds into the forecast • The sources of data and market research that can help to identify viable segments • The range of quantitative approaches to qualifying segments • The tabular approach to prioritising • Segmentation hierarchy, detailing importance of choosing right level to segment at and the criteria for choice • The pros and cons of not fully covering a marketplace • Mapping sales structures to marketplace segmentation, e.g., account based, product based, key account, hybrid, inside sales, field sale, alliances, partnerships, resellers etc.

Assessor Guidance	
1.	Learners should analyse at least two ways in which markets are defined and explain how to map at least one market. Their explanation of market bases should cover at least two consumer markets and at least two business markets. Learners should evaluate at least three benefits of market segmentation. Their explanation of why monitoring and revising market segmentation should include at least two examples to illustrate their points.
2.	Learners should include strategy, vision, goals and objectives of one organisation in their assessment. This may be the organisation that they work for, or a case study provided by their training provider if they are not currently employed in a sales role. At least two segments should be identified in the assessment using objective criteria and a weighted/scoring technique to show the details of what was considered during the assessment. There should be a clear statement of the findings based on the assessment. Learner should base the sales structure that they devise on their assessment findings and cover the two segments.

L4B4 Build and Maintain Sales Relationships

Unit Title	L4B4 Build and Maintain Sales Relationships	
UAN	H/650/7903	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to establish, develop and maintain sales relationships	1.1	Explain the importance of developing and establishing trusted relationships
	1.2	Analyse how to build and maintain sales relationships
	1.3	Explain how to identify key stakeholders
	1.4	Evaluate the reasons for relationship damage and how to repair them
2. Understand internal organisational dynamics and external influences and their impacts	2.1	Evaluate how internal organisational dynamics can impact a sales opportunity
	2.2	Evaluate how external influences and events can impact a sales opportunity
	2.3	Explain how employer politics and policy can impact personal selling effectiveness
	2.4	Explain how to respond to changes in the political landscape
3. Be able to deliver a positive customer experience during the sales process	3.1	Deliver a positive customer experience by establishing relationships proactively
	3.2	Use internal processes to monitor customer experiences
	3.3	Demonstrate integrity when developing and maintaining sales relationships
	3.4	Identify and minimise customer concerns to prevent complaints

Additional Information	
Unit purpose and aims	To enable learners to understand how to develop and maintain business relationships. Learners will deliver a positive customer experience during the sales process.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 4 Sales Executive Apprenticeship</u>** **S2.2** Is able to demonstrate a customer engagement style that effectively opens sales conversations, builds rapport, enhances customer relationships and provides value add to the customer by demonstrating appreciation of their requirements. **S10.1** Is able to demonstrate the steps they take to proactively deliver a positive customer experience, and how these connect to the wider expectations of their organisation. **S10.2** Is able to provide evidence of when they have proactively prevented and minimised customer concerns and complaints in a

		professional fashion by resolving potential areas of concern before a complaint arises. **B1.3** Is able to demonstrate integrity in all business relationships and describe what integrity is against an ethical code for sales. **B2.1** Provide evidence of where they have proactively developed new customer and existing customer relationships, highlighting the activities that made their actions proactive as opposed to reactive, and explaining what 'good proactivity' looks like within their organisation. **B2.3** Is able to identify and appropriately use existing internal processes to monitor customer experiences.
Location of the unit within the subject/sector classification system		15.4 - Marketing and Sales
Indicative Content		
1.	• Types of sales relationships: person to person, business to business • Nature of different business relationships, e.g., transactional, functional, strategic consultant, trusted advisor etc. • How to build trust with others • How to deliver value in every interaction • Demonstrating interest in the customer and their issues • The range of listening skills that can be used to develop relationships • How to create value in interactions • The importance of being respectful of customers time and priorities • Ways to respond to challenging behaviours • How to build consensus across a group • Influencing and persuading skills • How to conduct relationship/stakeholder mapping • How to identify key stakeholders • Using internal resources to cover customer (e.g., CFO to CFO) • Understanding personal limits to building relationships and the reasons • Understanding relationships inside the customer's organisation and how they impact decision making • How relationships can be damaged and how to repair them • How to deal with inherited bad relationships • How to keep relationships active • The importance of being consistently professional	
2.	• The different types of internal organisational dynamics, e.g., organisational culture, leadership styles, organisational structure, communication channels, incentive and compensation plans, training available, technology and tools, decision making processes etc. • How internal dynamics can impact a sales opportunity and how to plan to minimise any negative impacts	

	• The range of external influences and events that can impact a sales opportunity, e.g., economic conditions, market trends, competitive landscape, regulatory changes, technological advancements, global events, customer budgets and priorities, seasonal trends, social and cultural attitudes, supplier relationships, public perceptions and reputation, emerging markets, natural disasters, cybersecurity threats, political instability etc. • The different types of employer politics that impact on sales relationships, e.g., ethical practices • The different types of employer policies that apply to sales relationships, e.g., codes of conduct, anti-bribery, anti-corruption, gifts and entertainment guidelines, conflict of interest, data protection, customer relationship policies, territory management rules/boundaries etc. • Ways that organisational policies and internal politics can impact personal effectiveness when selling and how to manage this • The ways that the political landscape can change, e.g., regulations, trade policies, taxation, government targets and spending etc. • How to respond to changes in the political landscape when building and maintaining sales relationships
3.	• How to establish relationships pro-actively • How to balance personal ideas of what pro-active means with the expectations of different customers • What 'proactivity' looks like within different organisations based on individual needs, expectations and culture • The internal processes that help to monitor customer experiences and how to access them • Ways to demonstrate integrity consistently in all business relationships, e.g., by expressing gratitude, valuing honesty/openness, being responsible and accountable for agreed actions, respecting others, helping others, building trust, showing patience and flexibility when things change etc.

Assessor Guidance	
1.	Learners should provide at least two workplace examples of why it is important to develop and establish trusted relationships. They should analyse at least two different ways to build relationships and at least three ways that sales relationships are maintained. Learners should explain at least three ways to identify key stakeholders, giving examples to support their points. They should evaluate at least three reasons for relationship damage and provide examples of how these types of relationships damage can be repaired.
2.	Learners should evaluate at least three types of internal dynamics that can impact a sales opportunity, giving examples to support their points. They should also evaluate how at least two external influences/events can impact a sales opportunity. When explaining how employer politics and policy can impact personal selling effectiveness, learners should provide at least one workplace example for each. One change to the political landscape should be explained with at least two examples of how they could respond provided.
3.	Learners should provide evidence of proactively establishing relationships with at least two customers and using internal processes to monitor their experiences. This could be records

	of communication with them or a testimony from their manager or a colleague. The evidence must clearly show that this delivered a positive customer experience so feedback from at least two customers should be provided. At least two ways that integrity against an ethical code for sales has been demonstrated should be provided (these may be different customers to those evidenced above). At least one example of minimising customer concerns to proactively prevent a complaint arising should be provided.

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L4B5 Partnering and Collaborative Selling

Unit Title	L4B5 Partnering and Collaborative Selling	
UAN	J/650/7904	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand how partnering relationships contribute to sales	1.1	Explain different types of partnering relationships that are used in sales
	1.2	Analyse the advantages and disadvantages of partnering
	1.3	Evaluate the benefits of external partnering relationships
	1.4	Explain how internal partnering relationships support better customer outcomes
2. Understand how to collaborate with colleagues to sell	2.1	Explain the key roles and responsibilities in a collaborative selling team
	2.2	Analyse the advantages and disadvantages of team selling
3. Be able to collaborate with colleagues to respond to sales opportunities	3.1	Agree team sales plans for sales opportunities with colleagues
	3.2	Complete agreed actions to contribute to team performance
	3.3	Evaluate own performance during collaborative selling opportunities

Additional Information	
Unit purpose and aims	To enable learners to understand how partnering relationships contribute to sales. Learners will collaborate with colleagues to respond to a sales opportunity.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **S9.1** Is able to demonstrate how they effectively contribute within their team environment. **S9.2** Is able to provide evidence of where they have worked collaboratively with internal and external stakeholders, detailing the differences in the way they work with their direct team, with other teams within their organisation, with customers, and with any other relevant third parties **S9.3** Is able to manage communications with the cross-functional team in relation to the effective delivery of their sales, and describe which teams or departments have significant impact on their role and their customers, and who the key personnel are. **S9.4** Is able to provide evidence of where they have supported continual business improvement by sharing best practice with sales team colleagues and applicable business units. **Level 3 IT Technical Salesperson Apprenticeship** **S9**

	Technical: ability to understand and explain the technical portfolio and technical systems sold within the organisation and can use the current hardware and operating systems available. **B10** Ability to operate in a secure manner
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• Different types of partnering, e.g., business partners, alliances, co-selling, informal cooperation, teaming etc. • The benefits of partnering relationship, e.g., to improve selling activities, produce better progress or deliver more value etc. • Internal partnering with other parts of the selling company • Partnering with companies in adjacent (complimentary) areas, and the issues that may arise when partnering with much larger or much smaller partners • Why clarity on responsibilities and expectations for each partner is important when partnering, and how to manage these • Understanding the damage done from breaking 'partnering rules' and dealing with conflicts • The importance of aligning goals for each partner • Understanding informal, tactical partnering arrangements and formal partnering agreements • How to spot when partnering is of benefit to self/customer • Establishing the win-win-win • Why partnering fails • Signs that partnering is not working • Leveraging internal resources • Understanding what is best done by other resources • Being more efficient and effective by delegating • How to co-opt people into helping • How to show respect and appreciation to internal and external partners
2.	• Why and when to form a selling team, e.g., to improve efficiency, leverage different competencies, increase proposal speed, draw on expert knowledge/experience, complexity, dependency etc. • Different types of teams, e.g., virtual, formal, informal, global etc. • The advantages and disadvantages of a team selling including the challenges that can be faced by the leader of a selling team • The key roles and responsibilities that selling teams have and how to agree them with others • The differences in working with a direct team, other teams within the organisation, customers, and other relevant third parties
3.	• How a sales team is created to respond to an opportunity • The teams/departments that have significant impact on sales and who the key personnel are • How to create a sales plan that supports collaborative working • How to consult with team members to create and agree the sales plan • Briefing / agreed strategy, dos and don'ts • Assigning responsibilities and actions to team members

	• Leadership activities as a sales professional/colleague, e.g., coordination of activities, tracking progress, acting as a customer point of contact etc. • How to respond to ineffective collaborative working

Assessor Guidance	
1.	Learners should explain at least three types of partnering and give examples of when each is used. Their evaluation should explore at least two benefits of external partnering relationships. Learners should explain at least two types of internal partnering, each supported by at least one example of how each helps to produce better customer outcomes. Learners should analyse at least two advantages and two disadvantages of partnering.
2.	Learners should identify at least two key roles and give at least three examples of the responsibilities for each of the roles. They should consider the differences in the way they work with their direct team, other organisational teams, customers, and other relevant third parties. At least three advantages and three disadvantages should be analysed with examples provided to support points and clear conclusions reached.
3.	Learners should agree at least two sales plans with colleagues where they agree to complete at least three actions to contribute to selling. They should complete their actions and update their colleagues. Evidence should show how they have managed cross-functional communications. The evaluation of their performance should identify at least one strength and at least one development area for improvement in collaborative working. The evaluation should be shared with sales team colleagues and other departments/functions to support continual business improvements.

L4B6 Use Digital Technologies

Unit Title	L4B6 Use Digital Technologies		
UAN	K/650/7905		
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	
	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	<u>**Level 4 Sales Executive Apprenticeship**</u> **K6.1** Is able to describe the digital technologies currently available within their organisation to help aid the sales cycle, and how internal resources such as CRM systems and external resources such as social media are currently used for lead generation. **S11.1** Is able to use digital tools to conduct research and target customers, including the use of primary research tools such as internal CRM and sales data analysis systems, and secondary research tools such as social media and internet search engines. **S11.2** Is able to demonstrate the ability to deliver presentations and/or meetings using digital communication tools that are applicable to your organisation's product(s) and/or service(s), customers and sales processes, such as video conferencing tools, screenshare tools, or interactive digital presentations. **S11.3** Is able to complete accurate records and process sales in accordance with their organisation's policies, procedures and digital CRM systems.

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.

L4B7 Using Data to Gain Insights

Unit Title	L4B7 Using Data to Gain Insights	
UAN	L/650/7906	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to use data for decision making	1.1	Explain how to determine the validity and reliability of data sources for sales related decision making
	1.2	Explain how to use data from sales support systems to evaluate portfolios or territories
	1.3	Analyse how data insights help to develop customer relationships
	1.4	Explore the risks to decision making of using inferior quality data
	1.5	Assess how organisations use data to develop their products/services and strategy
2. Be able to use data to gain insights and support sales decisions	2.1	Identify valid and reliable data sources for sales decision making
	2.2	Collect and organise data to inform decision making
	2.3	Analyse data to gain insights and make sales related decisions

Additional Information	
Unit purpose and aims	To enable learners to understand how to use data for decision making. Learners will use data to gain insights and support sales decisions.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **K2.4** Is able to outline how they and their organisation demonstrates compliance with relevant data protection guidelines, identifying how they adhere and keep up to date with them. **S11.1** Is able to use digital tools to conduct research and target customers, including the use of primary research tools such as internal CRM and sales data analysis systems, and secondary research tools such associated media and internet search engines.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The methods used to ensure data validity, reliability, and completeness etc. • How they and their organisation comply with relevant data protection guidelines, and keep up to date with them • Theories and techniques for analysing data • Techniques for collating and using data • How to ensure that sufficient data has been collected to make a decision

	• How to evaluate portfolios or territories for opportunities or threats using data • How organisations use data to drive sales strategy and future products/services • How to balance qualitative and quantitative data • The impact of using inferior quality data to make decisions
2.	• The sales support systems that can provide data (CRM, Customer Experience, Logistics etc) • The types of data that is available from different systems and how to access it • The types of organisational decisions that benefit from data analysis • How to use data appropriately to support decision making and make recommendations • Knowing when data is needed for such situations and how much and what data • The methods used to identify trends in data • The insights that can be determined using valid and reliable data • How to extrapolate and project data to make a decision • The importance of analytical skills in the sales decision-making process

Assessor Guidance	
1.	Learners should explain at least three ways to check the validity and reliability of data. They should explain how at least two sales support systems can be used to identify opportunities and threats for portfolios/territories. The analysis should provide at least two examples of data insights help to develop customer relationships and explore at least two risks of using inferior quality data. Learners should provide at least one example of how organisations use data to develop strategy and at least one example of using data to develop products/services.
2.	Learners should identify at least two data sources and confirm validity and reliability. They should collect and organise data to inform at least two sales related decisions. Learners must explain how they have analysed the data and provide relevant evidence, e.g., spreadsheet. The insights gained from the data should be clearly stated with explicit links to the analysis conducted. Evidence of making at least two decisions based on data should be provided.

L4B8 Differentiate in a Competitive Market

Unit Title	L4B8 Differentiate in a Competitive Market	
UAN	M/650/7907	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the importance of the differentiation	1.1	Explain the importance of differentiation in a competitive market
	1.2	Explain how to differentiate an organisation's products/services against key competitive alternatives
2. Understand the strengths, weaknesses, strategy, tactics and market presence of key competitors	2.1	Analyse ways to overcome direct and indirect competition
	2.2	Explain how to gain agreement with customers to select own organisation's products/services
	2.3	Evaluate how the "voice of the customer" links to product/service development
3. Be able to differentiate products/services against competitors	3.1	Use evaluation tools to create an overview of a competitor
	3.2	Differentiate an organisation's products/services against competitors

Additional Information	
Unit purpose and aims	To enable learners to understand the strengths, weaknesses, strategy, tactics and market presence of key competitors. Learners will differentiate an organisation's products/services against competitors.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **K2.1** Is able to describe the features and advantages of their organisation's product(s) and/or services(s) and how these meet the needs of their customers. **K2.2** Is able to demonstrate how they compare their organisation's product(s) and/or service(s) to competitors' solutions, identifying where they can positively differentiate their product(s) and/or service(s) in sales conversations.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The importance of differentiating own organisation's offer during sales conversations and other interactions • The differences between direct and indirect competition, and how these are overcome, e.g., solve customers' pain points, storytelling, competitive pricing, provide great customer service, change offer when required etc. • The processes and approaches that help to gain customer agreement, and how to apply these in practice • How to gain agreement with the client on selecting own organisation, e.g., the differential value / benefits of working with you & your products / solutions

2.	• How to identify competitor tactics to maintain competitiveness • Ways to create structured input into a broader business case for the development of a profitable and competitive portfolio of products/services • The importance of providing 'voice of the customer' feedback to relevant people within the organisation • How to assess the competitive strengths and vulnerabilities of products/services within the portfolio to input into product enhancement or new product development strategies
3.	• The evaluation tools available, e.g., SWOT analysis, PESTLE analysis, 4 Ps (Product, Price, Place, Promotion) etc. • How to differentiate an organisation's products/services with a sustainable advantage capable of defeating competitive alternatives

Assessor Guidance	
1.	Learners should explain why differentiation in a competitive market is important and dive at least two examples to support their points. They should provide at least two ways to differentiate an organisation's products/services against a key competitor.
2.	Learners should explain the difference between direct and indirect competition, then analyse at least four ways that competition can be overcome, giving workplace examples to support their ideas. The process/approaches for gaining agreement from a customer in a competitive market should be explained. Learners should outline what is meant by 'voice of the customer' and evaluate how this links to product/service development to remain competitive.
3.	Learners should use at least two tools to evaluate a customer and create a brief overview. They should then use the overview they have created to differentiate another organisation against this. Ideally, learners should use their own organisation and a key competitor if they are in a sales role. If they are not currently working in a sales role, they can use two competitive organisations suggested by the centre.

Qualification Unit Specifications – Core

L4C1 Finding and Qualifying New Prospects

Unit Title	L4C1 Finding and Qualifying New Prospects	
UAN	J/650/7913	
Level	4	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to identify a new prospect	1.1	Explain the criteria for identifying a new prospect
	1.2	Evaluate methods for finding prospects
	1.3	Explain how to generate leads using a range of internal and external information sources
	1.4	Explain the importance of sharing findings across the organisation
	1.5	Define the process of qualification
2. Be able to complete discovery on a prospect	2.1	Conduct the process of opportunity discovery
	2.2	Review a prospect's business issues
	2.3	Assess a prospect's needs
	2.4	Evaluate how the prospect fits with your proposition
3. Be able to qualify a prospect	3.1	Use methods to determine whether a prospect is a qualified lead
	3.2	Evaluate how you qualified an opportunity
	3.3	Explain circumstances when it may be necessary to disengage from a potential prospect

Additional Information	
Unit purpose and aims	To enable learners to understand how to identify a new prospect. Learners will complete discovery on a prospect and qualify them.
Details of the relationship between the unit and apprenticeship standards	<u>**Level 4 Sales Executive Apprenticeship**</u> **K1.2** Is able to summarise the key principles and objectives of their organisation's marketing and sales strategies, referencing internal documentation and internal resources where appropriate. **K1.4** Is able to describe how their role within the organisation contributes to their organisation's wider marketing and sales strategies. **S7.1** Is able to demonstrate how they identify and use different resources and methods to gather market intelligence from internal information and external sources. **S7.2** Is able to provide evidence of where they have analysed and interpreted market intelligence and used appropriate or correct internal process to share their findings across their organisation.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The difference between a prospect and a lead • The key principles and objectives of organisational marketing and sales strategies • How to develop an ideal customer profile • How to obtain information from a variety of internal sources, e.g., focus groups, surveys, data information providers (Mintel, LexisNexis or Avention), trade journals/newspapers CRM, knowledge pool, intranet • How to obtain information that is relevant to an organisation's sales activities from a variety of external sources e.g., trade magazines, financial resources, websites, vertical or job role of buyer, social media • How to use information for providing insights into sales planning and decision making • The legal and regulatory constraints on information collection; primary and secondary data • How to understand the benefits of all data sources including how to check validity, avoid bias and ensure completeness • The different types of prospects and how sales approaches differ, e.g., individual, organisation • The criteria for identifying prospects, e.g., need, budget, authority • The range of methods used to find prospects, e.g., evaluate customer base, create customer persona, networking etc. • How leads can be generated, e.g., ask existing customers for referrals, create social media content, email marketing, organise events etc.
2.	• The opportunity discovery process, e.g., qualify leads, clarify customer needs, sell solutions not products/services, focus on the outcome, ask relevant questions, adapt script to build rapport etc. • How to review a prospects business issues/pain points; directly and indirectly • How to assess a prospect's needs, e.g., research, ask probing questions, pay attention to detail, segment pain points, discovery meeting etc. • The current approaches and sales techniques related to the discovery phase, e.g., personalisation, problem-centricity, proactivity
3.	• The range of questions that can be used to qualify a prospect and when they are used • The methods used to qualify a prospect, e.g., BANT (Budget, Authority, Need, Timing), PESTLE (Political, Economic, Sociological, Technological, Legal and Environmental) etc. • The reasons for walking away from a prospect, e.g., lack of clarity about needs, no budget available, too many competitors, lack of response to communications, lack of progress, product/service not a good fit etc.

Assessor Guidance	
1.	Learners should explain at least three criteria for qualifying a prospect and give examples of how they are used. At least three methods for finding prospects should be evaluated and the learner should reach a conclusion about which is the most effective for their own sales context (or a context provided by the centre if they are not currently working as a sales professional). Learners should explain the link between lead generation methods and at least two internal information sources and two external sources.

	When explaining the importance of sharing findings across the organisation, they should provide at least two workplace examples to support their points and reference relevant internal documentation and internal resources.
2.	Learners should follow a clearly defined opportunity discovery process and provide supporting evidence to show what they did and their rationale. Evidence of assessing the needs related to one prospect should be provided, with at least one business issue identified. A clear match to the sales proposition should be made. If learners are not currently in a sales role, a realistic organisational context should be provided for them to use.
3.	Learners should plan to qualify a prospect using at least two methods and evidence of following a structured process should be provided. A qualified opportunity should be provided for assessment. Learners should explain the situations where they have (or would) walk away from a prospect giving reasons for the decision. If learners are not currently in a sales role, a realistic organisational context should be provided for them to use.

L4C2 Prepare and Present Sales Solutions

Unit Title	L4C2 Prepare and Present Sales Solutions	
UAN	K/650/7914	
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	**Level 4 Sales Executive Apprenticeship** **S2.2** Is able to demonstrate a customer engagement style that effectively opens sales conversations, builds rapport, enhances customer relationships and provides value add to the customer by demonstrating appreciation of their requirements. **S3.1** Is able to demonstrate how they use effective questioning techniques that are applicable to their product/service offering to identify customer needs. **S3.2** Is able to describe at least two examples of questioning and listening techniques which can be used to guide the sales conversation **S3.3** Is able to demonstrate where they have gained a mutual understanding with customers through active questioning,

		listening and response, including the use of techniques to ensure agreement. **S4.1** Is able to develop a sales proposal and use appropriate presentation styles and techniques with their customers. **S4.2** Provides evidence of where they have used existing nomenclature as well as learning from sales conversations to improve their sales proposals and presentations. **S4.3** Is able to present relevant products and/or services and explain their features and advantages, adapting their presentation style (such as their use of technology versus face-to-face meetings) in order to meet audience requirements. **S4.4** Is able to demonstrate how they explain to customers the value and benefit of their proposed solution using an appropriate range of different presentation techniques. **S4.5** Is able to demonstrate where they have used and adapted a range of techniques to draw-out and overcome common sales objections, including the handling of potential objections and hidden objections.
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.

L4C3 Develop Value Propositions

Unit Title	L4C3 Develop Value Propositions	
UAN	L/650/7915	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the factors involved in creating a value proposition	1.1	Explain how a value proposition is built and the people involved
	1.2	Analyse the insights necessary to prepare a value proposition for a customer
	1.3	Evaluate the conditions and constraints of value propositions
2. Be able to prepare and agree value propositions	2.1	Prepare value propositions for customers
	2.2	Present the value propositions and secure customer agreement
	2.3	Maintain records of successful value propositions for future use

Additional Information	
Unit purpose and aims	To enable learners to understand the factors involved in creating a value proposition. Learners will prepare and agree value propositions.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** Not explicitly linked to the apprenticeship standard, although this unit may support learning related to **S4 Propose and present solutions.**
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The components of a value proposition and how to access previously successful propositions that may be useful • Customer requirements and how to ensure that they are fully understood • Issues of clarification, e.g., customer issues, organisational issues, potential issues, evaluation and effect • How to highlight strengths and minimise weaknesses • The people involved in the proposition, e.g., proposal team, manager, admin etc. • The ways that that propositions are objectively reviewed • How to fully address customer briefs/requirements • How to use persuasive arguments • How to use supportive proof and evidence • The quantitative and qualitative data used in sales propositions • The conditions and constraints, e.g., inclusion of organisation conditions/constraints, protection of organisation's interests, strategic aspects, stakeholder issues etc.
2.	• The Business Case: how the implementation of the solution or working with the supplier positively impacts the client situation

	• Ways that the value proposition can be presented to a customer • How to secure customer agreement to the proposition • Why it is important to maintain records of successful propositions for future use, e.g., to benefit other team members, to save time when developing new propositions etc.

Assessor Guidance	
1.	Learners should detail each stage involved in developing a value proposition and give examples of at least two people who are involved. They should analyse at least three types of insights and reach a conclusion about why each is important. At least two conditions and two constraints should be covered.
2.	Learners should prepare at least two value propositions for customers and present them to secure their agreement. Evidence should be provided that they have maintained records in line with their organisation's requirements so that they can be accessed in future.

L4C4 Competitive Bidding

Unit Title	L4C4 Competitive Bidding	
UAN	M/650/7916	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to respond to requests for competitive bids	1.1	Explain the purpose and processes of bid management
	1.2	Evaluate activities required to fully comply with bidding requirements
	1.3	Explain the impact of organisational conditions and constraints on bid management
2. Be able to submit a competitive bid	2.1	Assess the reasons for a client asking for a proposal and the potential for success
	2.2	Submit a bid following the client's bid management and submission process
	2.3	Analyse the strategies to improve win chances pre and post bid submission

Additional Information	
Unit purpose and aims	To enable learners to understand how to respond to requests for competitive bids. Learners will submit a competitive bid.
Details of the relationship between the unit and apprenticeship standards	Links to Apprenticeship Standard ST0056 'Bid and Proposal Co-ordinator'
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• Why customers ask for competitive bids • The processes, timescales and people involved in the bidding process • How to check that customer requirements and bid processes are fully understood • The potential issues that arise when bidding • Ways to fully address the customer brief/requirements concisely in a bid • How to incorporate persuasive arguments in bid documents • Ways to use supportive proof and evidence in bids • How quantitative and qualitative data can support bidding processes • The ways that bids are reviewed and finalised internally • The impact of organisational conditions and constraints on the bidding process, e.g., response times, budget/resources available for bid development etc.
2.	• How to assess an opportunity to bid and make an informed decision to complete/not compete • The requirements for submitting bids, e.g., document format, supporting evidence, software systems to be used etc. • The importance of analysing way to improve success before submitting the bid • How to evaluate the bid submission once an award has been made by the client, both when the bid is successful and unsuccessful

	• How to learn from the process and how this information can be used to make improvements in future bids

Assessor Guidance	
1.	Learners should explain at least two reasons why customers ask suppliers to competitively bid for products/services and explain the process from start to finish. Their evaluation should include at least three activities with examples of how these support compliance with the bidding process. At least one organisational condition and one constraint should be explained in relation to a specific bid opportunity.
2.	Learners should use a live bid opportunity to complete this learning outcome, providing evidence of submitting a bid. They should evidence that they have worked with at least one other colleague to improve their chance of the bid winning before submitting it. Once the contract has been awarded, they should analyse the reasons why they were successful/unsuccessful and draw conclusion to improve future bid submissions.

L4C5 Negotiate and Close Sales

Unit Title	L4C5 Negotiate and Close Sales	
UAN	R/650/7917	
Level	4	
Credit Value	5	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to negotiate and handle objections	1.1	Explain delegated authority and the key steps in a sales negotiation
	1.2	Evaluate how to react to objections posed by customers
	1.3	Compare different types of closing methods
	1.4	Explain how to create a 'win-win' situation during negotiations to achieve an ethical outcome
2. Be able to close deals by achieving a win-win outcome	2.1	Develop objectives for negotiations based on customer, market and competitor insights
	2.2	Conduct a sales negotiation with customers
	2.3	Respond to customers verbal and non-verbal buying signals
	2.4	Record outcomes of negotiations in line with legal and organisational requirements

Additional Information	
Unit purpose and aims	To enable learners to understand how to negotiate and handle objections. Learners will be able to close deals by achieving a win-win outcome.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 4 Sales Executive Apprenticeship</u>** **S5.1** Is able to describe their organisation's negotiation needs, expectations and trading variables, providing examples in relation to at least one variable of what would constitute favourable, acceptable and unacceptable terms. **S5.2** Is able to provide evidence to demonstrate where they have researched and analysed a customer's likely negotiation stance; utilising at least three different negotiation planning and preparation techniques. **S5.3** Is able to describe how they would react to, or counter, at least two different negotiation styles, tactics or other potential sources of conflict. **S6.1** Is able to provide evidence, using at least two examples of how they identify verbal and non-verbal buying signals during customer conversations. **S6.2** Is able to explain the difference between ethical and unethical closing techniques. **S6.3**

		Is able to provide evidence, using at least two examples of how they respond to customer buying signals and use ethical techniques to close sales and confirm customers' purchase agreement or 'buy-in' at an appropriate point in the sales conversation.
Location of the unit within the subject/sector classification system		15.4 - Marketing and Sales
Indicative Content		
1.	• Roles and responsibilities, who is negotiating for the customer and their authority • An organisation's negotiation needs, expectations and trading variables • Procurement tactics • The delegated responsibilities of the sales professional • Opportunities, e.g., the strategic question, how relevant own organisation is to the customer, where the business has added value in similar circumstances, reviewing where the customer can be helped to achieve strategic aims, offering expertise, CO-IMPACT sales techniques etc. • The steps that are used during sales negotiation • How to create negotiation objectives based on research and the customer's likely negotiation stance • How to react to/counter different customer negotiation styles, tactics and potential sources of conflict • The reasons why customer objections are raised and how to respond • Different types of closing techniques, e.g., scarcity, summary, assumptive, sharp angle, question etc. • The ethical and legal issues related to negotiation and objection handling	
2.	• What constitutes favourable, acceptable and unacceptable terms for an organisation • How to create negotiation objectives based on research and the customer's likely negotiation stance • How own products/services address customer and potential issues • Why it is important to place a financial value on solving issues • Consultative selling to build rapport, trust and growth • Customers likely to respond to consultative selling and the best places to find them, e.g., exhibitions, events, journals, social channels for personal and business understanding of customers • product/service in relation to customer needs and expectations • The benefits of working together, e.g., mutual benefits, joint ventures, long term relationship, helping each other etc. • Negotiation planning and preparation techniques • Gives and takes, non-negotiables, tactics strategy, plans, ZOMA, BATNA • The conditions for a legally recognised order • Understands concept of continual micro-closing- setting meeting objectives, confirming with customer at meeting end that they were met, agreeing next action (closing - gaining agreeing on next steps) • Use of micro-closing (Always Be Closing) to continually advance the engagement • How to use an appropriate close, and what is too ambitious	

Assessor Guidance

1.	Learners should explain what is meant by delegated authority giving at least one example. The key steps of sales negotiation should be explained in depth, using a relevant model or approach (this may be their own organisation's process). They should evaluate at least three types of customer objections, providing suggestions for how each may be overcome. Learners should compare at least four types of closing methods, considering when each should be used and giving at least one example for how each can be used successfully. They should define what is meant by a /win-win' situation and the ethical considerations associated with negotiation.
2.	Learners should develop objectives for at least two different customer negotiations that is based on researching them to gain insights. They should conduct at least two short sales negotiations with customers. These conversations should be observed/recorded to provide evidence of building rapport, responding to buying signals, and recording outcomes in line with legal and organisational requirements. Learners should ideally use their own organisation's sales objectives and customers. If they are not currently working in a sales role, a realistic sales negotiation simulation should be provided for them to use to demonstrate their skills.

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L4C6 Meet Commitments and Prove Value

Unit Title	L4C6 Meet Commitments and Prove Value	
UAN	T/650/7918	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the importance of meeting customer commitments	1.1	Explain how delivering on commitments creates customer loyalty
	1.2	Analyse the potential impact when customer commitments are not met
	1.3	Evaluate the activities to address and mitigate when commitments are not being met
2. Be able to demonstrate to the client that the promised value has been delivered	2.1	Define commitment and establish KPIs for a customer
	2.2	Meet with the customer to review contract performance
	2.3	Review KPIs and take corrective action where required

Additional Information	
Unit purpose and aims	To enable learners to understand the importance of meeting customer commitments. Learners will demonstrate to the client that the promised value has been delivered.
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 – Sales and Marketing
Indicative Content	
1.	• The types of commitment that are made to customers • The relationship between delivering on commitment and customer loyalty • The people and processes involved in delivery and acceptance • How to acknowledgement commitments • The internal colleagues who need to be aware of the commitments made • What to measure with a KPI and how to structure them
2.	• How to set expectations with a customer and the tools that are used to support the process • How to gain customer agreement that the promised value has been met • The impact of missing expectations/commitments/KPIs • Making commitments and delivering them to gain trust • Managing missed commitments or commitments that will be missed • Ensuring customers achieve expected outcomes from their investments • How to gain customer recognition of the value received • Ways to document the customer value delivered and evidence this with the customer • The types of corrective action that may be required to deliver promised value • How to build references and case studies to use in the future

Assessor Guidance	
1.	Learners should give a detailed explanation of the link between delivering commitments and customer loyalty, using at least two examples to support their points. They should analyse at least two impacts that may occur when commitments are not met, considering the impact from the customer, personal and organisational perspectives. Their evaluation should include at least two mitigating activities and at least two actions that address situations when commitments are not being met.
2.	Learners should provide evidence of agreeing at least three KPIs and any other commitments with a customer. They should provide evidence of how they have reviewed contract performance during a customer meeting and taken at least one corrective action to deliver the promised value. If no corrective action is required, an example should be provided of when this could be required and what action they would take.

L4C7 Pipeline Management and Forecasting

Unit Title	L4C7 Pipeline Management and Forecasting	
UAN	Y/650/7919	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to manage a sales pipeline	1.1	Explain how a sales pipeline supports sales activity
	1.2	Explain the typical stages of a sales pipeline
	1.3	Evaluate the role of a CRM system in managing a sales pipeline
	1.4	Explain how and when to move an opportunity through a sales pipeline
	1.4	Analyse the reasons why a pipeline may be unbalanced
2. Be able to use a sales pipeline in forecasting	2.1	Summarise the data held within a sales pipeline
	2.2	Use pipeline data to support forecasting
	2.3	Use new data to re-forecast

Additional Information	
Unit purpose and aims	To enable learners to understand how to manage a sales pipeline. Learners will use a sales pipeline in forecasting.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **S1.4** Is able to provide a territory plan (or an alternative plan aligned with their organisation's planning processes), explaining how they have applied pipeline management principles in order to create their plan and prioritise customers and activities.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• What a sales pipeline is and how it relates to the sales process • How to align the customer purchasing process to a sales pipeline • The common stages of a sales pipeline stages • Different CRM systems and their key features • How a CRM system supports the management of a sales pipeline • The criteria for moving an opportunity onto the next stage • A balanced pipeline versus unbalanced sales pipeline and what actions to take
2.	• The information available in a sales pipeline • How to forecast revenue using the sales pipeline • How to apply probabilities • How to re-evaluate pipeline activity based on new data or insights • The importance of keeping records up-to-date

Assessor Guidance	
1.	Learners should explain the purpose of a sales pipeline and the typical stages involved. They should provide at least three examples of how a sales pipeline supports sales activity.

	Learners should focus on one CRM system to evaluate how it helps to support the sales process, identifying aspects that work well and anything that could be improved. At least one example should be provided to explain how an opportunity moves through the sales pipeline with explanations that illustrate their understanding of timings. Learners should describe what is meant by a ‘balanced’ and an ‘unbalanced’ pipeline then analyse at least two reasons why a pipeline may be unbalanced.
2.	Learners should focus on a live pipeline from their workplace to respond to the second learning outcome. They should summarise the data that is held in the pipeline (names should be anonymised) than use it to forecast sales. Evidence should also be provided of re-forecasting based on receiving new data.

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L4C8 Customer Focus

Unit Title	L4C8 Customer Focus	
UAN	F/650/7920	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the importance of customer focus	1.1	Explain the importance of customer centricity
	1.2	Explain how customer focus helps the selling process
	1.3	Analyse methods to measure customer satisfaction
	1.4	Explore how to respond to customer needs that conflict with organisational priorities
2. Be able to prepare and conduct a business review to provide value add to a customer	2.1	Prepare a business review with a customer
	2.2	Conduct and document a customer focused business review
	2.3	Demonstrate understanding customer requirements using an appropriate engagement style
	2.4	Use cross-selling opportunities during the business review
	2.5	Evaluate how the review has impacted the customer relationship, organisation's solutions and go-to-market strategy

Additional Information	
Unit purpose and aims	To enable learners to understand the importance of customer focus. Learners will prepare and conduct a business review to provide value add to a customer.
Details of the relationship between the unit and apprenticeship standards	**S2.1** Is able to effectively interpret information communicated with customers in written, verbal and nonverbal forms. Communications responded to in an appropriate way to drive business benefits **S2.2** Is able to demonstrate a customer engagement style that effectively opens sales conversations, builds rapport, enhances customer relationships and provides value add to the customer by demonstrating appreciation of their requirements. **S2.2** Is able to demonstrate their ability to plan and lead sales conversations, and proactively make recommendations to support customer requirements.
Location of the unit within the subject/sector classification system	Is able to identify and appropriately use existing internal processes to monitor customer experiences.
Indicative Content	
1.	• Definitions of customer centricity • What can go wrong when customer centricity is not in place • How to obtain and capture informal customer and team feedback

	• How Voice of the Customer can be obtained, captured and synthesised to provide input into company strategy • Having the initiative to take actions to resolve a customer issue • Customer complaints, e.g., problems with product/service, organisation/customer conflicts, handling appropriately, providing suitable solutions, resource issues, evaluating how own products/services would address such issues, gather information/data (through different means) etc. • How to understand the customer's business and their customers • How centricity leads to insights that helps the customer to improve their business • Critique of Net Promoter Score (NPS), Customer Satisfaction Score (CSAT) and Customer Effort Score (CES) measurements
2.	• Types of customer review, e.g., formal quarterly review • Being a champion for the customer inside the organisation to get actions done to address their issues • The sources of information that can be used to plan a business review with a customer • The business objectives behind existing customer communication tools, e.g., brochures, presentations and proposals • How to effectively interpret information communicated with customers in written, verbal and nonverbal forms • The different engagement styles that may be used, e.g., building rapport, opening sales conversations, providing added value etc. • How customers social preferences differ and how to adapt approaches • Ways that responses to customers can drive business benefits • Selling professionally, e.g., not pursuing 'poor' deals that have value only for the customer • Being a customer champion/advocate

Assessor Guidance	
1.	Learners should give at least three examples that explain why customer centricity is important. They should explain at least two links between customer focus and the selling process. Learners should analyse at least two methods that are used to measure customer satisfaction to reach a conclusion about which they think is most suitable for their context. At least two examples of situations where customer needs conflict with organisational priorities should be given with suggestions of how to approach these to maintain a positive customer relationship.
2.	Learners should use at least two sources of information to prepare for a business review with a customer. They should evidence that they have conducted at least one business review and kept records up to date in line with their organisation's processes and systems. This could be provided as a video/audio recording, or an observation/witness testimony from an assessor, trainer, peer or manager. They should use brochures, presentations and/or proposals during their review. At least one occasion of cross-selling should be evidenced. In their evaluation after the business review, learners should consider how the customer centric approach impacted their relationship with the customer. They should then consider the broader picture of how focusing on customers impacts their organisation's solutions and go-to-market strategy, giving at least one example for each.

L4C9 Principles of Account Management

Unit Title	L4C9 Principles of Account Management	
UAN	H/650/7921	
Level	4	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand the principles of account management	1.1	Explain good practice for managing an account
	1.2	Evaluate how stakeholder mapping contributes to account management
	1.3	Explain the different roles that account contacts play in defining, assessing and selecting solutions from suppliers
	1.4	Analyse the activities involved in managing a portfolio of accounts
	1.5	Explain Account Based Marketing
	1.6	Explain the concept of 'share of wallet', how to determine your company's share and how to grow
2. Be able to work with customers to deepen and extend relationships and expand sales volumes or relevance	2.1	Analyse customers business drivers, activities, challenges and opportunities
	2.2	Identify opportunities for cross selling and up selling into accounts
	2.3	Determine competitive threats in accounts and respond to these
	2.4	Conduct 'report card' assessments in accounts and take corrective action where risks are identified

Additional Information	
Unit purpose and aims	To enable learners to understand the principles of account management. Learners will work with customers to deepen and extend relationships and expand sales volumes or relevance.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 4 Sales Executive Apprenticeship</u>** **K4.1** Is able to demonstrate an understanding of how they analyse the challenges and purchasing motivations of typical customers. Is able to describe why customers buy from their organisation, using at least two examples of how their organisation's product(s) and/or services(s) satisfy common customer challenges and purchasing motivations. **K4.2** Is able to explain at least one external and one internal factor that impact their customers' purchasing decisions. **K4.3** Is able to describe what constitutes a high-quality customer experience, using evidence from customers to justify their opinion. **S1.1**

	Provides evidence of where they have reviewed existing sales forecasts and set targets in order to grow account value (in line with their organisation's strategy). **S1.2** Is able to describe how they review customer accounts to identify and select those they will target for growth, including reasons for their selection. **S1.3** Is able to describe principles that exist within their organisation to grow targeted customer accounts.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The good practices related to account and portfolio management, e.g., 'share of wallet' concept, competitors' activity, trends, SWOT analysis etc. • How to create a stakeholder map and why it is important when managing accounts • Stakeholder mapping, account mapping (people, position, relationship/view of supplier), key decision makers, procurement approach etc. • The engagement, presence, activity levels, impact, relevance as a supplier • How to gain customer insight and access information • The approaches that build and maintain customer trust • Planning resources, e.g., existing resources required, potential additional resources needed, customer locations, number of contacts to cover etc. • The differing account contacts roles and how they each contribute to the sales process, e.g., multi-level and cross department relationships
2.	• The business drivers, activities, challenges and opportunities that customer have • Analysing customer loyalty, e.g., understand the market environment, look at market research, understand business environment of customers, feeding back to internal stakeholders of potential new products/services, providing insights that will add value to the customer etc. • The approaches used to expand business, how to identify them for a customer and when to use them, e.g., up-selling, cross selling, selling add-ons etc. • The different ways to determine and respond to competitive threats • Account team organisation, e.g., roles and responsibilities, relationship coverage, managing/coordinating engagement etc. • Customer issues, e.g., complaints, problems, organisation/customer conflicts, handling appropriately, providing suitable solutions, resource issues, evaluating how own products/services would address such issues, gather information/data • How to conduct report card assessments to identify risks and take action

Assessor Guidance	
1.	Learners should explain at least three good practices for managing an account with examples to support each of them. They should evaluate the role that stakeholder mapping plays in account management using an illustration of a completed stakeholder map to explain their ideas.

	Learners should explain who is involved in defining, assessing and selecting solutions from suppliers, covering at least three different account contact roles. The explanation of Account Based Marketing should include what it is and an example of a campaign that has been personalised for a customer. Learners should demonstrate that they understand ‘share of wallet’, how it is calculated, and how it links to business growth.
2.	Learners should complete an analysis for at least two customers. Each should cover business drivers, activities, challenges and opportunities. They should then use their analysis to identify opportunities for both cross and up selling for both customers. Learners should determine at least one competitive threat for both customers and respond appropriately in line with their organisation’s approaches. ‘Report card’ assessments should be completed for both customers to identify at least one risk for each customer and the associated corrective action should be taken.

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Qualification Unit Specifications – Leadership

L4L1 Understand Continuous Improvement

Unit Title	L4L1 Understand Continuous Improvement	
UAN	J/650/7922	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the processes related to continuous improvement in sales performance	1.1	Explain the importance of continuous innovation and improvement in sales performance
	1.2	Explain the stages of continuous improvement in sales performance using a model
	1.3	Evaluate how small improvements can improve organisational sales results
2. Understand how to implement continuous improvements in sales performance	2.1	Analyse ways to improve organisational efficiency, performance and customer satisfaction
	2.2	Explain how to implement continuous improvement plans with stakeholders
	2.3	Explain how to use data to review the impact of continuous improvements

Additional Information	
Unit purpose and aims	To enable learners to understand the processes related to continuous improvement in sales performance. Learners will explore how to implement continuous improvements in a sales environment.
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.	• Definitions of organisational innovation and improvement • The reasons why sales departments need to innovate and improve, e.g., changing buying patterns, new technology, competitor and market changes, routes to market, etc • Types of innovation, e.g., incremental (continuous), architectural, disruptive, radical etc. • The stages of organisational innovation and improvement, e.g., clarify, ideate, develop, implement, optimise etc. • Different models of continuous improvement, e.g., Deming's PDCA cycle, Total Quality Management (TQM), Six-Sigma, Kaizen, Lean, ISO 9000 etc.
2.	• The components required in a continuous improvement plan, e.g., analysis, objectives, actions, people responsible, target/review dates, level of risk etc. • The tools used to inform the content of a continuous improvement plan • The people involved in developing and implementing a continuous improvement plan

	• How to track progress towards achievement of the plan • Relevant legal and organisational requirements related to implementing continuous improvements • How to use data to assess the impact of the continuous improvements • Different types of organisational data available and how to interpret it • Organisational reporting conventions and formatting • How to influence and maintain momentum with stakeholders to embed and further develop organisational continuous improvement

Assessor Guidance	
1.	Learners should provide at least three examples of why it is important for organisations to innovate and improve. They should use one model to explain the stages of continuous improvement, giving examples to demonstrate that they understand how this is applied. Their evaluation of how small improvements can improve sales results should cover at least two examples of how the concept works in practice for an organisation.
2.	In their analysis, learners should include at least one way that organisational efficiency can be improved, at least one way that sales performance can be improved, and at least one way that customer satisfaction can be improved. This can be related to the organisation that they work for, or an organisational case study given by their training provider. Learners should outline what should be included in a continuous improvement plan and give examples of how at least three stakeholders would be involved in the process of improvements. In their explanation of using data to review the impact of improvements made, learners should refer to at least two different sources and how this would be used to report on the impact of the changes made.

L4L2 Contributing to Sales Talent Selection and Growth

Unit Title	L4L2 Contributing to Sales Talent Selection and Growth	
UAN	K/650/7923	
Level	4	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand the requirements for different sales roles	1.1	Explain the range of direct and indirect sales roles available in organisations
	1.2	Compare the knowledge, skills, behaviours and experience required for different sales professional roles
2. Understand the talent selection process	2.1	Explain how organisational needs, policies and procedures guide the talent selection process
	2.2	Explain how to develop a job description and specification for a sales role
3. Be able to contribute to the talent selection process	3.1	Prepare to conduct selection interviews for a sales role
	3.2	Contribute to a selection interview for a sales role
	3.3	Evaluate candidates against criteria to select an employee
4. Be able to support the growth of a sales professional	4.1	Contribute to the onboarding process for a sales professional
	4.2	Assess the professional growth needs of a sales professional
	4.3	Prepare a professional growth plan for a sales professional
	4.4	Provide support to a sales professional to facilitate their growth in the role

Additional Information	
Unit purpose and aims	To enable learners to understand the requirements for different sales roles and the talent selection process. Learners will contribute to the talent selection process and support their growth as a sales professional.
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 different types of sales roles that are available at different levels • How sales roles differ between organisations/sectors and the reasons for this • The differences between knowledge, skills and behaviours and how they relate to sales performance
2.	• The organisational policies and procedures that relate to selection and talent management • The basic legal aspects of selection • How a sales role fits into the achievement of organisation strategies • How to prepare job descriptions and person specifications • The range of methods for advertising vacancies, internally and externally, and how to select the most appropriate

3.	• The key steps to prepare for conducting selection interviews, e.g., format to be used, questions to be asked, people involved etc. • Different interview formats and how to select one, e.g., selection panel, group interview, video, F2F etc. • The skills required to conduct interviews effectively, e.g., professional, impartial, comply with relevant policies and equality laws etc. • The range of organisational requirements sales roles • How job descriptions and specifications support the selection process • The HR records that are required from the selection process to track the process • How to make a decision about the best candidate based on their experience and performance • The types of bias that occur during selection processes and how to avoid them, e.g., confirmation bias, halo/horns effect, affinity bias, beauty bias, group conformity etc.
4.	• The ways that organisations onboard their new employees • How to identify the growth needs of a sales professional using a range of inputs • How to prepare a professional growth plan for a sales professional to address the knowledge, skills and behaviours that require development • How to facilitate the growth of sales professionals using different types of support e.g., through coaching and mentoring, buddy approaches, personal SWOT analysis, supporting reflective practice, encouraging peer networking, signposting to internal/external learning and development opportunities, assessment against organisational competencies etc.

Assessor Guidance	
1.	Learners must explain at least three different sales roles with examples of how these might differ between different sectors. Their comparison of knowledge, skills and behaviours should focus on two contrasting roles. This may be a comparison of how a manager role differs from a front-line role, or how a field-based role differs from an office-based role etc.
2.	Learners will ideally research the organisational policies and procedures used for selection in the organisation that they currently work for. If learners are not currently working, or find this difficult to access, a suitable organisation (with publicly accessible policies) can be recommended to them, or they can use good practice sources of information, e.g., ACAS, CIPD etc. Learners should explain the process involved in writing a job description/specification and the people who may be involved, with a summary of the features that should be included.
3.	Learners must prepare and conduct 30-minute selection interviews with at least two candidates. They will ideally use a real interview opportunity that they can be involved in. However, if learners are not currently in a sales role, a realistic organisational context and role play with at least two ‘candidates’ should be provided for their assessment. (Peer learners are suitable to play the role of ‘candidates’ in the simulated environment provided they are fully briefed about the requirements). Tutors should observe any simulated interviews and keep notes. If learners use a real interview opportunity, they must ask for a witness testimony about their performance from another panel member, or from their tutor/manager observing them. Learners should evaluate candidates against organisational needs and job description, and provide interview records with related decisions as evidence for 3.3 (with candidate anonymity protected when required)

4.	Learners must provide a detailed explanation of the onboarding process for one organisation. This can be the organisation that they work for, or an alternative organisation suggested by their tutor. They should identify the growth needs of a sales professional using a range of inputs and prepare a professional growth plan to address the knowledge, skills and behaviours that require development. Learners should provide at least two types of support to one sales professional to support their growth, ideally in the current sales role. If learners are not currently employed in a sales role, they can provide support to their peer learners in a simulated scenario developed by their training provider. Records of the support provided should be submitted as evidence to meet 4.2

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L4L3 Understanding Compensation Plans

Unit Title	L4L3 Understanding Compensation Plans	
UAN	L/650/7924	
Level	4	
Credit Value	2	
Guided Learning Hours	10	
Learning Outcomes	**Assessment Criteria**	
1. Understand compensation plans and remuneration models	1.1	Explain the importance of matching compensation to organisational and personal goals
	1.2	Evaluate models and methods of compensation and rewards for sales professionals
	1.3	Analyse quantitative and qualitative methods for gathering information related to sales performance and professional development
2. Understand how to select and plan sales incentives	2.1	Analyse the financial and non-financial incentives available in an organisation to motivate sales professionals
	2.2	Explain how to assess the performance of a sales professional using quantitative and qualitative data
	2.3	Explain how to create incentive compensation plans for sales professionals

Additional Information	
Unit purpose and aims	To enable learners to understand compensation plans and renumeration models for sales teams. Learners will explore how to select and plan sales incentives.
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 relationship between sales professional compensation and the achievement of organisational goals • The difference between compensation (salaries, wages) and rewards (incentives, bonuses, commission) • Models of compensation and rewards • Quantitative methods, e.g., customer satisfaction scores, new business pipeline, customer retention figures, growth, service standards etc. • Qualitative methods used to gather information about individual performance, e.g., customer satisfaction scores, new business pipeline, customer feedback etc. • The importance of linking professional performance to personal development in the role
2.	• The types of financial incentives available in different organisations, e.g., salary increase, bonus, commission • Non-financial incentives that can be used for sales professionals, e.g., promotion, training, projects, additional responsibility, larger customer accounts, internal recognition, opportunity to train/mentor/coach others etc.

	• How to assess the performance of sales professionals using the data available from different sources • How to distinguish between measures for the individual and those for the overall sales team overall • The incentive models that can be used in an organisation and how to select the most appropriate approach for an individual

Assessor Guidance	
1.	Learners should explain why matching compensation to goals is important. They should provide at least one workplace example of linking compensation to organisational goals, and one example of linking compensation to person goals. The evaluation should cover at least two models/methods which address both compensation and rewards. Learners should analyse at least two quantitative and at least two qualitative methods for gathering information about sales performance. They should then make links to how this informs professional development.
2.	Learners should analyse at least two financial and two non-financial incentives that are used to motivate sales professionals in an organisation. This can be their own organisation, or one provided by the centre/training provider if the learner is not currently carrying out a sales role. Learners should explain how to use both quantitative and qualitative data to assess the performance of a sales professional and create an incentive compensation plan for them. This should ideally be based on a sales professional within their organisation.

L4L4 Participating in Coaching and Mentoring

Unit Title	L4L4 Participating in Coaching and Mentoring	
UAN	M/650/7925	
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
	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	**<u>Level 4 Sales Executive Apprenticeship</u>** **B5.1** Is able to provide evidence using at least two examples to demonstrate where they have received and have responded positively to coaching, guidance or instruction.
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.

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L4L5 Managing Change

Unit Title	L4L5 Managing Change		
UAN	R/650/7926		
Level	4		
Credit Value	6		
Guided Learning Hours	60		
Learning Outcomes	**Assessment Criteria**		
1. Understand change management approaches	1.1	Evaluate change management models and theories	
	1.2	Explain the process for implementing change	
	1.3	Analyse the barriers to change and how to overcome them	
	1.4	Explain the importance of creating a vision for change	
2. Be able to initiate change	2.1	Create a change management plan that is aligned to stakeholder requirements	
	2.2	Secure commitment to the change management plan from stakeholders	
	2.3	Implement the change management plan	
3. Be able to manage an organisational change	3.1	Engage with stakeholders during change management	
	3.2	Monitor activities against the change management plan	
	3.3	Report on expected change outcomes to stakeholders	

Additional Information	
Unit purpose and aims	To enable learners to understand change management approaches. Learners will initiate and manage an organisational change.
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.	• Change management theories and their key features, e.g., Three Step Change Management Model (Lewin, 1947), 8 Steps for Leading Change (Kotter, 2014), McKinsey 7-S Framework (1979), Prosci ADKAR (Hiatt, 2003), Bridges Transition Model (1991), Kübler-Ross Change Curve (1969), Nudge theory (Thaler and Sunstein, 2008) etc. • How to select a change management approach to meet an organisational need • Processes for implementing organisational change, e.g., consulting stakeholders, defining requirements /objectives, developing action plans, identifying roles/responsibilities, setting target dates, securing commitment and resources, agreeing milestones, piloting ideas, designing training, delivering development activities etc. • The potential individual and organisational barriers to change, e.g., lack of trust in the process and management, insufficient/ineffective communication, fear of the unknown, lack of understanding of the benefits, lack of time, disengagement with the organisation, resistance to power structure, threat, lack of understanding, splinter groups, working patterns, changing priorities, need for re-structuring/role changes, organisational culture clash, organisational change fatigue etc.

	• Approaches that can be used to overcome barriers, e.g., senior sponsorship support, consultation/focus groups to clarify concerns, encourage idea sharing, collaboration to create solutions, consistent messaging for all stakeholder groups, frequent communication, encouraging questions to check understanding, use of change champions, coaching, mentoring etc. • How to create a compelling vision for change, e.g., unique goal, defined benefits, engage hearts and minds, connect to employee purpose and values etc.
2.	• The components of a change management plan, e.g., stages, actions, resources, timescales, key messages, stakeholder groups, milestones, communication activities for different audiences, training requirements, resistance management approaches, feedback mechanisms, reporting, etc. • How to secure commitment to the change management plan from stakeholders • The approaches that support effective plan implementation, e.g., communicating tangible success measures, connecting the vision to day-to-day organisational activities, storytelling communication style, using accessible language, defining and allocating tasks at team/individual levels, encouraging psychological safety to learn from mistakes, checking progress frequently, encouraging two-way communication etc.
3.	• The techniques that support effective stakeholder engagement, e.g., regular two-way communication, emotional intelligence, motivational conversations, coaching, inclusivity, constructive feedback, rewards and recognition etc. • How to monitor change management activities against the agreed plan, e.g., progress reporting, performance against key performance indicators, quality or other measures, obtaining feedback, budget reports, customer surveys, analysing systems records etc. • Why it is important to report regularly to stakeholders • The different ways that progress can be reported to stakeholders and how to select a method that suits the organisation and stakeholders

Assessor Guidance	
1.	Learners should evaluate at least three models and theories, giving examples of how these may and may not work in practise. A process for implementing change should be explained stage by stage, with details of the activities and people involved. Learners should analyse at least three barriers to change, ideally those most relevant to their own workplace, and provide examples for how these can be overcome. Learners should explain why it is important to create a compelling vision for change with at least one example of how this would be done.
2.	Learners should identify stakeholder requirements and then create a change management plan that includes milestones, at least three actions, resources, target date, measures of success etc. They should provide evidence of consulting with at least one stakeholder to secure agreement to the plan and provide evidence of starting to implement at least one action in the workplace.
3.	Learners should provide evidence of engaging with at least two stakeholders during the change. The change management plan should be reviewed and updated on at least three occasions.

	Learners should provide reports to update at least two stakeholders on change management progress on at least three occasions. The final report should be related to completion of the change project.

L4L6 Understanding Leadership Styles and Motivation

<table>
<tr><td>Unit Title</td><td colspan="2">L4L6 Understanding Leadership Styles and Motivation</td></tr>
<tr><td>UAN</td><td colspan="2">T/650/7927</td></tr>
<tr><td>Level</td><td colspan="2">4</td></tr>
<tr><td>Credit Value</td><td colspan="2">2</td></tr>
<tr><td>Guided Learning Hours</td><td colspan="2">10</td></tr>
<tr><td>Learning Outcomes</td><td colspan="2">Assessment Criteria</td></tr>
<tr><td rowspan="3">1. Understand how leadership styles impact organisational performance</td><td>1.1</td><td>Explain the difference between leadership and management</td></tr>
<tr><td>1.2</td><td>Analyse a range of leadership styles</td></tr>
<tr><td>1.3</td><td>Evaluate the impact that leadership styles have on performance</td></tr>
<tr><td rowspan="3">2. Understand how to motivate others to perform at their best</td><td>2.1</td><td>Explain how to apply a motivation theory in the sales environment</td></tr>
<tr><td>2.2</td><td>Evaluate how motivational factors apply to different situations, teams and individuals</td></tr>
<tr><td>2.3</td><td>Analyse the role that leaders play in motivating others</td></tr>
</table>

<table>
<tr><td colspan="2">Additional Information</td></tr>
<tr><td>Unit purpose and aims</td><td>To enable learners to understand how leadership styles impact organisational performance and how to motivate others to perform at their best.</td></tr>
<tr><td>Details of the relationship between the unit and apprenticeship standards</td><td>Not linked to the apprenticeship standard.</td></tr>
<tr><td>Location of the unit within the Ofqual subject/sector classification system</td><td>15.4 - Marketing and Sales</td></tr>
<tr><td colspan="2">Indicative Content</td></tr>
<tr><td>1.</td><td>• 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</td></tr>
<tr><td>2.</td><td>• 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</td></tr>
</table>

	• 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.

L5L5 Contributing to Organisational Innovation

Unit Title	L5L5 Contributing to Organisational Innovation	
UAN	Y/650/7928	
Level	5	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand innovation in organisations	1.1	Explain why organisations need to be future focused and innovative
	1.2	Analyse formal and informal types of innovation
2. Understand how to support organisational innovation	2.1	Evaluate the factors that support an innovative organisational culture
	2.2	Explain how sales professionals can identify and share emerging innovation opportunities
3. Be able to contribute to exploiting emerging opportunities	3.1	Review emerging issues and innovation opportunities for an organisation
	3.2	Specify recommendations for an organisation to innovate to exploit emerging opportunities

Additional Information	
Unit purpose and aims	To enable learners to understand the role of innovation in organisations and the factors that support it. Learners will contribute to exploiting emerging opportunities.
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 definitions of ‘future focus’ and ‘innovation’ and why these are relevant in the current climate • The range of reasons why organisations need to innovate, e.g., to reduce costs, improve productivity, respond to market/sector trends, secure competitive advantage, diversify their product/service offer, support the organisation’s growth strategy, develop new revenue sources, increase market share, build brand value, meet ethical, legal and regulatory changes etc. • The different formal and informal types of innovation that are used in organisations, e.g., continuous improvement, radical, incremental, disruptive, organic, breakthrough, business process re-engineering, business model and processes, open source and user led/co-creation etc.
2.	• The role of the sales professional in supporting organisational innovation • The factors that support innovation in organisations, e.g., strategic priorities, leadership styles, organisational structure, organisational culture, individual/team working styles, leadership attitudes to change and risk etc. • How to identify emerging opportunities for organisational innovation as part of day-to-day sales activities with potential/existing customers and own broader network

	• The methods that can be used to share ideas for innovation with colleagues and leaders, e.g., formal and informal meetings, brainstorming, reporting on customer feedback etc.
3.	• How to review emerging issues and opportunities within organisations • How to specify recommendations for new innovations to secure future organisational success • How to link recommendations with organisational strategy and values.

Assessor Guidance	
1.	Learners should provide at least three reasons why organisations need to focus on the future with supporting workplace examples. They should analyse at least one formal and at least one informal type of innovation that are used in organisations
2.	Learners should evaluate at least three factors that support an innovative organisational culture, giving examples to demonstrate their understanding of how these work in practice. Their explanation should address both how opportunities are identified, and how they are shared with others in the organisation.
3.	Learners should review at least one emerging issue and the associated opportunities for an organisation. This may be the organisation that they work for or a case study organisation that is provided by the centre. There should be at least three recommendations for innovation specified for AC3.2. with clear evidence that these have the potential to address the opportunities.

Institute of **Sales Professionals**

Qualification Unit Specifications – Self

L3S1 Personal Motivation and Sales Performance

Unit Title	L3S1 Personal Motivation and Sales Performance	
UAN	A/650/7929	
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 standard
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.

L4S1 Developing Personal Resilience

Unit Title	L4S1 Developing Personal Resilience	
UAN	H/650/7930	
Level	4	
Credit Value	5	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand the relationship between growth mindset and resilience	1.1	Explain the concepts of growth mindset and resilience
	1.2	Analyse an evidence-based model of resilience
	1.3	Explore the impact of growth mindset and resilience on self and the organisation
	1.4	Explain the importance of resilience to mental wellbeing and sustained performance
2. Be able to measure personal resilience	2.1	Assess personal resilience using an assessment tool
	2.2	Gather feedback from a professional mentor about personal resilience
	2.3	Analyse the results of the personal assessment and feedback
3. Be able to plan to develop and maintain personal resilience	3.1	Produce an action plan to develop and maintain own resilience
	3.2	Implement the personal action plan to develop own resilience
	3.3	Summarise the impact that actions taken have had on developing and maintaining personal resilience

Additional Information	
Unit purpose and aims	To enable learners to understand the relationship between growth mindset and resilience. Learners will measure their own personal resilience and produce an action plan for ongoing development.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **B3.1** Is able to provide evidence using at least two examples to demonstrate their ability to control their actions, reactions and emotions. **B3.2** Is able to provide evidence using at least two examples to demonstrate their ability to remain calm under pressure. **B3.3** Is able to assess their personal impact on others, identifying their relevant personality traits and explaining how others may react to them. **B4.1** Is able to describe approaches to maintain optimism and professionalism in the face of rejection and quickly recover from setbacks and provide evidence using at least two examples to demonstrate where they have successfully applied these techniques. **B4.3**

	Provide evidence of where they have set and achieved personal and professional goals, describing the techniques they used to remain highly motivated to do so.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• Definitions of growth mindset and resilience • How growth mindset and resilience impact individuals and their organisation, e.g., performance, working culture, team collaboration, team support, wellbeing, career aspirations etc. • The importance of maintaining personal optimism and professionalism to quickly recover from rejections and setbacks • The benefits of a growth mindset and resilience, e.g., positively embrace challenges, persistence in the face of setbacks, view effort as an essential component of performance, learn from criticism, inspired to learn from others success, manage stress etc. • Evidence based approaches to building resilience, e.g., mindfulness, cognitive behavioural therapy (CBT) techniques, problem-solving and creativity, social support and empathy, supporting organisational structures, processes and culture, realistic optimism, gratitude, mood management, emotional intelligence, Maddi's 'hardy skills' (coping, social support, relaxation, nutrition and physical activity), mental toughness etc.
2.	• Assessment tools that can be used to assess personal resilience, e.g., i-resilience (Robertson Cooper), Envisia Resilience Inventory (Talent Tools), The Resilience Quiz (Siebert), Nicholson McBride Resilience Questionnaire (NMRQ), Mowbray's Resilience Assessment Questionnaire (RAQ), etc. • Who to get feedback from related to personal resilience, e.g., professional mentor • The importance of building a trusted relationship with a professional mentor • How to interpret and analyse results of resilience assessments to develop meaningful conclusions and actions
3.	• The components of a personal action plan, e.g., based on assessment results, goals, SMART (specific, measurable, achievable, relevant, time-bound) objectives, activities, resources, people etc. • The benefits of implementing a personal action plan to improve resilience and mindset • How to monitor and review a personal action plan, adjusting when required • How to recognise personal progress and learning • Ways to measure changes to resilience and mindset

Assessor Guidance	
1.	Learners should explain in their own words what is meant by growth mindset and resilience, giving at least two examples for each to demonstrate their understanding. One model of resilience should be selected, and learners should analyse this to draw their own ideas about what they think is effective/ineffective when applying this themselves. Learners should provide one example of the impact of growth mindset and one example of the impact of resilience (covering both personal and organisational impacts in both examples).

	The explanation of the link between personal resilience with sustained performance and mental wellbeing should include references to relevant research/evidence sources.
2.	Learners should use a tool to assess their resilience and ask for feedback on their resilience from a professional mentor (who may be their line manager). When analysing the results of their resilience assessment, they should also consider the feedback received from their mentor. They should explore the results for themself and the organisation including their ability to: control their reactions and emotions; remain calm under pressure; and how the personal impact that they have on others.
3.	Learners should produce an action plan based on their findings for 2.3 and include at least three objectives with related activities, target dates, resources etc. The action plan should be implemented and updated over a six-week period. Learners should provide a summary of how they implemented the plan and provide at least two examples of the impact that this had on developing and maintaining their personal resilience.

L4S2 Using Legal, Regulatory and Ethical Frameworks

Unit Title	L4S2 Using Legal, Regulatory and Ethical Frameworks	
UAN	J/650/7931	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the legal, regulatory, and ethical frameworks related to the sales function	1.1	Explain how organisations meet legal and regulatory requirements related to the sales function
	1.2	Explain how to comply with organisational sales values and ethics
	1.3	Evaluate the impact of non-compliance for the individual and organisation
2. Be able to comply with organisational legal, regulatory, and ethical policies and procedures	2.1	Analyse an organisation's legal, regulatory, and ethical policies and procedures
	2.2	Demonstrate compliance with an organisation's legal, regulatory, and ethical policies and procedures
	2.3	Recommend improvements to an organisation's legal, regulatory, and ethical policies and procedures

Additional Information	
Unit purpose and aims	To enable learners to understand the legal, regulatory, ethical and social frameworks related to the sales function. Learners will comply with organisational legal, regulatory, and ethical policies and procedures.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **K2.3** Is able to describe the legal, regulatory and ethical frameworks relating to their sector and role, identifying key legal and regulatory elements that are applicable and how they adhere to them. **B1.1** Is able to provide evidence of where they have acted as an ambassador for their employer's brand, detailing what this entailed and the behaviours that were demonstrated. **B1.2** Is able to describe the main principles of their organisation's values and code(s) of conduct and describe the actions and behaviours that need to be demonstrated to comply with these.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	

1.	• Why it is important to adhere to legal, regulatory, and ethical requirements • Legal and regulatory requirements and where to source current information, e.g., Data Protection, Sale of Goods Act, Office of Fair trading (OFT), industry specific departments such as the Financial Conduct Authority (FCA), Sarbanes-Oxley, Health and Safety Executive, Codes of Conduct etc.

	• Sales ethics: the behaviours that ensure that every lead, prospect and customer is treated with respect, fairness, honesty and integrity • Ethical issues when conducting sales, e.g., mis-selling, misleading a customer, discrimination, misuse of company credit cards/expenses, reporting inaccurate work hours, inflating projected sales data/contact calls made/sales history, accepting gifts, engaging in high pressure selling, protecting confidential and privileged information etc. • The impact of non-compliance with legal, regulatory, and ethical requirements, for individuals, teams, and organisations • Elements of contract law, e.g., offer, acceptance, consideration, intention and capacity • Organisational values and codes of conduct that should be complied with when conducting sales activities • The conditions needed to record an order on financial records • The organisational processes that ensure compliance with the law, and the penalties for misrepresentation
2.	• The range of organisation policies available and how these are communicated to employees, e.g., via software channels, intranet, websites, handbooks, daily practices that ensure compliance, regular updates etc. • The processes that support compliance and the people responsible • How to consult on organisational policies and procedures, e.g., conducting open discussions, incorporating into sales meetings, encourage ongoing feedback, peer meetings, surveys etc. • How to act as an ambassador for an employer's brand in relations to legal, regulatory and ethical practices • How to make recommendations for improvements based on own analysis of policy/procedures in practice and feedback from others

Assessor Guidance	
1.	Learners should explain at least two legal and at least two regulatory requirements that organisations must meet giving relevant examples of actual organisations to support their points. The principles of contract law should be explained in their own words to demonstrate their understanding and how these apply in practice. Learners should explain the main principles of an organisation's values and code(s) of conduct. At least two workplace examples should be provided to illustrate the behaviours required to comply with the values and code(s) of conduct. Learners should analyse at least one legal, one regulatory and one ethical example of non-compliance. They should explore the potential impact that these situations can have on both individuals and organisations.
2.	Learners should analyse at least one legal, one regulatory and one ethical policy (and any related procedures) for an organisation. Evidence should be provided to demonstrate compliance with at least one legal, one regulatory and one ethical policy in their day-to-day sales activities. One example of acting as an ambassador for their employer's brand should be given with a summary of the behaviours that were demonstrated. At least two improvements should be recommended, with clear links made to the analysis conducted for 2.1 and learner's experiences of following policies and procedures in 2.2

L4S3 Continuing Professional Development (CPD)

Unit Title	L4S3 Continuing Professional Development (CPD)	
UAN	K/650/7932	
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	**Level 4 Sales Executive Apprenticeship** **B4.3** Provide evidence of where they have set and achieved personal and professional goals, describing the techniques they used to remain highly motivated to do so **B5.2** Is able to provide evidence to demonstrate where they have worked with internal management to identify their sales strengths and weaknesses and have planned their continual professional development accordingly. **B5.3** Is able to provide evidence to demonstrate they have actively sought out development opportunities outside of formal learning situations.
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.

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L4S4 Self-Management

Unit Title	L4S4 Self-Management	
UAN	L/650/7933	
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 4 Sales Executive Apprenticeship** **S8.1** Is able to provide evidence to demonstrate where they have used appropriate tools and techniques to effectively plan and manage their time. **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.

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L4S5 Contributing to an Inclusive Culture

Unit Title	L4S5 Contributing to an Inclusive Culture	
UAN	M/650/7934	
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.

L4S6 Understanding and Building Agility

Unit Title	L4S6 Understanding and Building Agility	
UAN	R/650/7935	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand organisational and personal agility	1.1	Explain the importance of organisational agility
	1.2	Evaluate the factors that drive organisational agility
	1.3	Explain the importance of personal agility
	1.4	Analyse how to develop personal agility
2. Understand the importance of flexibility and adapting to change	2.1	Explain the importance of being flexible and adapting to change
	2.2	Analyse the risks associated with inflexibility to changing environments and challenges
3. Be able to build personal agility to adapt to change	3.1	Assess current abilities to adapt to change
	3.2	Develop a personal action plan to improve personal agility
	3.3	Implement a personal action plan to improve agility
	3.4	Review progress towards improving personal agility

Additional Information	
Unit purpose and aims	To enable learners to understand organisational and personal agility, and the importance of flexibility and adapting to change. Learners will build their own personal agility to adapt to change.
Details of the relationship between the unit and apprenticeship standards	**Level 4 Sales Executive Apprenticeship** **B4.2** Is able to describe what is required to adapt well and keep going during periods of change and adversity, and where applicable provide evidence using at least one example to demonstrate their abilities in this area.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The reasons why organisations need to be agile, e.g., unpredictable future, technological changes rapidly changing, to adapt to changing circumstances, to test new environments/markets, to meet changing customer needs etc. • The factors that drive organisational agility, e.g., collaboration, speed of decision making, testing and learning, empowerment, technology adoption, simplicity, knowledge-sharing, innovation focus etc. • The ways that personal agility can be developed, e.g., building self-awareness, adapting to situations, being proactive, controlling emotional responses, acknowledging fact from fiction, exploring differing perspectives, seeking help etc.

2.	• What is meant by being flexible and adapting to change • The reasons why sales professionals need to be flexible and able to adapt to internal and external changes • The types of changing environments that sales professionals experience • The challenges that sales professional face where they need to adapt quickly • The different organisational and personal risks associated with being fixed and inflexible as an individual
3.	• Different approaches that can be used to assess current abilities to adapt to change, e.g., adaptability assessment tools, organisational competence frameworks, developing own criteria, gathering feedback etc. • Learners should ideally use organisational change requirements when developing their action plan. • If learners are not currently in a sales role, a personal change context can be used, or a relevant organisational scenario provided • What should be included in a personal action plan, e.g., objectives, resources required, how progress will be measured, the support available, target dates etc. • How to implement an action plan and review progress regularly

Assessor Guidance	
1.	Learners should define what is meant by organisational agility and evaluate at least three factors that drive it. They must explain why personal agility is important and analyse at least three ways that personal agility can be developed with workplace examples to support their points.
2.	Learners should give an example of why it is important to be flexible and at least one example of why adapting to internal and external change is required in the sales professional role. The analysis should address at least three risks related to being inflexible. These should cover both personal and organisational risks.
3.	Learners should use a relevant approach to assess their own current ability to adapt to change and identify at least three actions to make improvements to their personal agility. They should implement their action plan and review their progress on at least two occasions, evidencing the changes that occurred and updating the actions when required.

Institute of Sales Professionals

Appendix 2: Linking the L4 Diploma to the L4 Sales Executive Apprenticeship

Apprenticeship Training Providers who deliver the Sales Executive (L4) apprenticeship have an opportunity to register learners onto this 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 L4 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 L4 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 of 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 only units that an Apprentice must provide evidence for in their Portfolio to be eligible to claim for the Level 4 Diploma in Executive Professional Sales (Apprenticeship Diploma).

Appendix 3 summarises how the Level 4 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 Sales Executive (L4) apprenticeship to the Level 4 Units

The table below summarises all the apprenticeship knowledge (K), skills (S) and behaviours (B) that are covered within the Level 4 units (at Pass level).

Note that the Level 4 Diploma in Executive Professional Sales (Apprenticeship) 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 Sales Executive Apprenticeship and L4 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**
A/650/7900	L4B1	Developing Commercial and Financial Acumen	K5: Commercial & financial acumen
H/650/7903	L4B4	Build and Maintain Sales Relationships	S2: Customer engagement S10: Customer experience B1: Ethics & integrity B2: Proactivity
J/650/7904	L4B5	Partnering and Collaborative Selling	S9: Collaboration & teamwork
K/650/7905	L4B6	Use Digital Technologies	K6: Digital knowledge S11: Digital skills
L/650/7906	L4B7	Using Data to Gain Insights	K2: Product, service & sector knowledge S11: Digital skills
K/650/7914	L4C2	Prepare and Present Sales Solutions	S2: Customer engagement S3: Customer needs analysis S4: Propose & present solutions
R/650/7917	L4C5	Negotiate and Close Sales	S5: Negotiate S6: Closing Sales
H/650/7930	L4S1	Developing Personal Resilience	B3: Self-discipline B4: Resilience and self-motivation
J/650/7931	L4S2	Using Legal, Using Legal, Regulatory and Ethical Frameworks	K2: Product, service & sector knowledge B1: Ethics & integrity
L/650/7933	L4S4	Self-Management	S8: Time management
K/650/7932	L4S3	Continuing Professional Development (CPD)	B5: Continuous professional development

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