ISP Level 5 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
V1.0	02/10/24	Draft for review - KA
V1.1 SG	2/5/25	Updated Units, QAN, UAN and text in line with L2, L3 & L4 Qual specs. Rebranded to new ISP logo.

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 the ISP website 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 Employer-led B2B Sales Trailblazer standards, thus ensuring that every salesperson certificated by the ISP and every apprentice certificated by the ESFA, has achieved a nationally recognised sales qualification and/or apprenticeship standard.

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 5 Qualifications

There are a range of ISP qualifications available at Level 5:

- 16 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 5 Award in Analysis Financial Performance	610/5663/7	5	25	50
Level 5 Award in Market Research and Sales Planning	610/5664/9	8	40	80
Level 5 Award in Managing Sales Technology Systems	610/5665/0	4	20	40
Level 5 Award in Relationship Management Mapping	610/5666/2	6	30	60
Level 5 Award in Tender Management	610/5667/4	5	25	50
Level 5 Award in Sales Territory Management	610/5668/6	6	30	60
Level 5 Award in Account Relationship Management	610/5669/8	6	30	60
Level 5 Award in Customer Buying Processes	610/5671/6	4	20	40
Level 5 Award in Managing Team Performance	610/5672/8	8	40	80
Level 5 Award in Managing Recruitment	610/5673/X	6	30	60
Level 5 Award in Motivating Sales Professionals	610/5674/1	5	25	50
Level 5 Award in Matrix Management	610/5676/5	5	25	50
Level 5 Award in Coaching and Mentoring	610/5677/7	6	30	60
Level 5 Award in Innovation	610/5679/0	7	35	70
Level 5 Award in Leadership	610/5680/7	9	45	90
Level 5 Award in Developing Critical Thinking	610/5681/9	4	20	40
Level 5 Certificate in Professional Sales	610/5683/2	Minimum 13 Maximum 36	130 to 369 hours	260 to 739 hours
Level 5 Diploma in Professional Sales	610/5684/4	Minimum 37	370 hours +	740 hours +

Description & Target Audience

The ISP Level 5 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 a variety of selling and sales manager roles. By achieving the qualifications learners will cover the required essentials of sales representation and leadership 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 5 Award qualifications can progress on to the Level 5 Certificate in Professional Sales. They can then progress onto the ISP Level 5 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 6 qualifications. They can also progress using their CPD programme.

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Qualification Structures – Certificates and Diplomas in Professional Sales

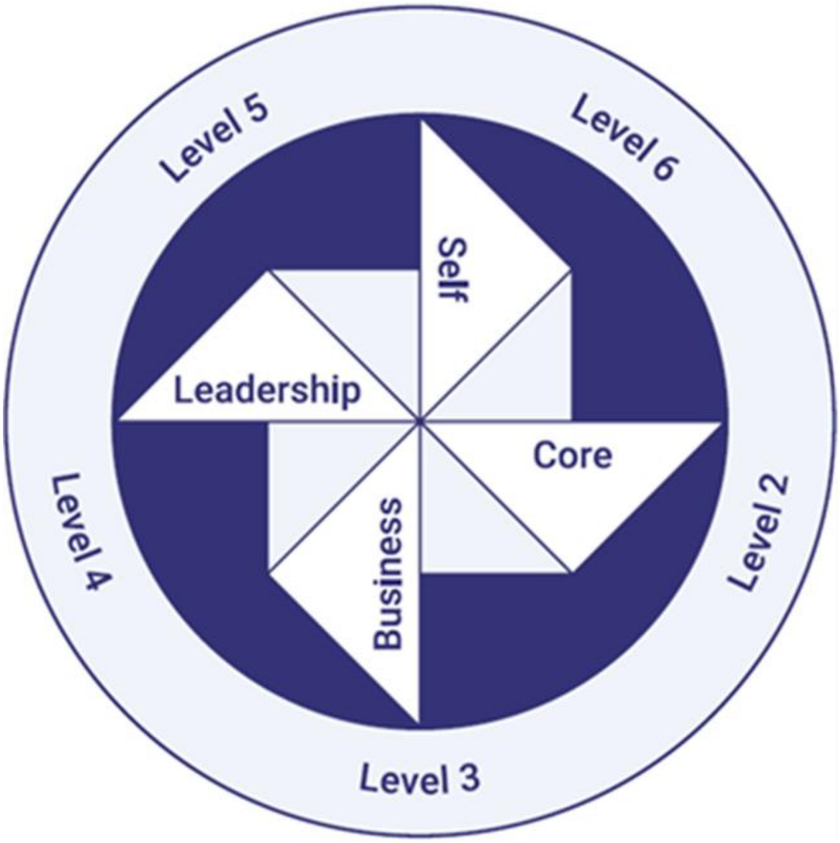
All Level 5 Certificate qualifications are constructed using a combination of units from each quadrant of ISP's Competency Framework.

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

Each quadrant is then broken down into **capabilities** (shown in white text in the image below). 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 5 Competencies are represented as Units within this Level 5 Qualification Specification.



Delivering the Level 5 qualifications

Qualification Structures - Awards

Level 5 Award qualifications are available for one- and two-unit qualifications in the combinations shown below:

Level 5 Award in Analysing Financial Performance

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/651/5975	L5B1	Analyse Financial Performance	5	25	50	5

Level 5 Award in Market Research and Sales Planning

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
D/651/5976	L5B2	Organisational Sales Planning	5	25	50	5
M/651/5980	L5B3	Market Research for Sales Strategy	5	15	30	3

Level 5 Award in Managing Sales Technology Systems

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
F/651/5977	L5B4	Manage Sales Technology Systems	5	20	40	4

Level 5 Award in Relationship Management Mapping

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
R/651/5981	L5B5	Relationship Management Mapping	5	30	60	6

Level 5 Award in Tender Management

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
T/651/5982	L5C1	Tender Management	5	25	50	5

Level 5 Award in Sales Territory Management

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
Y/651/5983	L5C2	Sales Territory Management	5	30	60	6

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Level 5 Award in Account Relationship Management

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/651/5984	L5C3	Account Relationship Management	5	30	60	6

Level 5 Award in Customer Buying Processes

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
D/651/5985	L5C4	Customer Buying Processes and Practices	5	20	40	4

Level 5 Award in Managing Team Performance

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
F/651/5986	L5L1	Manage Team Performance	5	40	80	8

Level 5 Award in Managing Recruitment

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
H/651/5987	L5L2	Manage Recruitment	5	30	60	6

Level 5 Award in Motivating Sales Professionals

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/651/5988	L5L3	Motivate Sales Professionals	5	25	50	5

Level 5 Award in Matrix Management

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
K/651/5989	L5L6	Matrix Management	5	25	50	5

Level 5 Award in Coaching and Mentoring

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
R/651/5990	L5L4	Coach and Mentor Sales Professionals	5	30	40	6

Level 5 Award in Innovation

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
Y/650/7928	L5L5	Contributing to Organisational Innovation	5	15	30	3
Y/651/5992	L5L7	Support Customer Innovation	5	20	40	4

Level 5 Award in Leadership

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/651/5993	L5S1	Leadership in Context	5	25	50	5
D/651/5994	L5S2	Manage Ethical, Legal and Professional Requirements	5	20	40	4

Level 5 Award in Developing Critical Thinking

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
F/651/5995	L5S3	Develop Critical Thinking Skills	5	20	40	4

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 6 options as part of the Certificate and Diploma qualifications as these support progression to higher levels of achievement.

To achieve a Certificate, learners must pass:

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

To achieve a Diploma, learners must pass:

- A minimum of 37 credits
- BUSINESS units totalling at least 9 credits
- CORE units totalling at least 12 credits
- LEADERSHIP units totalling at least 8 credits
- SELF units totalling at least 8 credits

Overview of units

BUSINESS units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/651/5975	L5B1	Analyse Financial Performance	5	25	50	5
D/651/5976	L5B2	Organisational Sales Planning	5	25	50	5
M/651/5980	L5B3	Market Research for Sales Strategy	5	15	30	3
F/651/5977	L5B4	Manage Sales Technology Systems	5	20	40	4
R/651/5981	L5B5	Relationship Management Mapping	5	30	60	6
F/650/7902	L4B3	Segmentation in Consumer and Business Markets	4	15	30	3
J/650/7904	L4B5	Partnering and Collaborative Selling	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
T/651/5982	L5C1	Tender Management	5	25	50	5
Y/651/5983	L5C2	Sales Territory Management	5	30	60	6
A/651/5984	L5C3	Account Relationship Management	5	30	60	6
D/651/5985	L5C4	Customer Buying Processes and Practices	5	20	40	4
J/650/7913	L4C1	Finding and Qualifying New Prospects	4	20	40	4
L/650/7915	L4C3	Develop Value Propositions	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

LEADERSHIP units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
F/651/5986	L5L1	Manage Team Performance	5	40	80	8
H/651/5987	L5L2	Manage Recruitment	5	30	60	6
J/651/5988	L5L3	Motivate Sales Professionals	5	25	50	5
R/651/5990	L5L4	Coach and Mentor Sales Professionals	5	20	40	6
T/651/5991	L5L5	Contributing to Organisational Innovation	5	15	30	3
K/651/5989	L5L6	Matrix Management	5	25	50	5
Y/651/5992	L5L7	Support Customer Innovation	5	20	40	4
R/650/7926	L4L5	Managing Change	4	30	60	6
T/651/6007	L6L4	Lead Continuous Improvement	6	40	80	8

SELF units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/651/5993	L5S1	Leadership in Context	5	25	50	5
D/651/5994	L5S2	Manage Ethical, Legal and Professional Requirements	5	20	40	4
F/651/5995	L5S3	Develop Critical Thinking Skills	5	20	40	4
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
R/650/7935	L4S6	Understanding and Building Agility	4	15	30	3
H/651/601	L6S2	Lead an Inclusive, Ethical Culture	6	15	30	6

Units selected must equate to a minimum of 50% at Level 5 or above.

TQT & GLH Definitions:

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.

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 5 or above and it is recommended they have a minimum of GCSE grade 4/C or above in English and maths. This is to ensure the learner can work at the functional skill level required of this qualification.

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

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

Recognising Prior Learning (RPL)

Ofqual definition of RPL is the:

(a) identification by awarding body of any learning undertaken, and/or attainment, by a Learner.
   a. prior to that Learner taking a qualification which, the awarding body makes available or proposes to make available, and
   b. which is relevant to the knowledge, skills and understanding which will be assessed as part of that qualification, and

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

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

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

Qualification Assessment

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

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

Knowledge criteria:

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

Skills and behaviour criteria:

- assessor observation - completed observational checklists
- witness testimony

- record of professional discussion
- candidate and peer reports

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

Each Unit has 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

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.

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.

Qualification Unit Specifications – Business

Unit Title	L5B1 Analyse Financial Performance	
UAN	A/651/5975	
Level	5	
Credit Value	5	
Guided Learning Hours	25	
Learning Outcomes	**Assessment Criteria**	
1. Be able to use financial tools for analysis of customer accounts	1.1	Estimate the potential lifetime value of customer accounts
	1.2	Calculate the sales volumes required to achieve target profitability
	1.3	Monitor the impact of variable costs on customer accounts profitability
2. Be able to follow organisational management accounting procedures	2.1	Evaluate fixed overheads and administrative costs related to customer accounts
	2.2	Calculate the profitability of customer accounts
	2.3	Use financial ratios to analyse customer accounts
3. Be able to evaluate financial risks	3.1	Analyse the business and financial risks associated with customer accounts
	3.2	Estimate the value of customer accounts using financial and qualitative evidence
	3.3	Review the financial performance of accounts to identify key trends and variances
4. Be able to estimate future financial performance for customer accounts	4.1	Produce contingency plans related to customer account financial performance
	4.2	Consult stakeholders to gather relevant financial performance data
	4.3	Evaluate the future direction of customer accounts based on financial performance

Additional Information	
Unit purpose and aims	To enable learners to be able to use financial tools for analysis of customer accounts. They will follow organisational management accounting procedures and evaluate the financial risks associated with customer accounts. Learners will estimate future financial performance for customers.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K7 Financial management techniques
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• Why understanding the financial aspects of customer accounts is vital for strategic decision-making • What is meant by ‘lifetime value’ and how to estimate this based on customers maintaining average loyalty levels, e.g., establish the value of an average order, multiply by customer frequency rate and then multiply by average customer lifetime • How lifetime value affects organisational objectives, margins/profitability etc. • How to estimate the potential lifetime value of customers and how this helps prioritise efforts towards high-value accounts • How to calculate the sales volumes required for target profitability and ensures alignment with overall organisational goals • How to optimise profitability and resource allocation by monitoring variable costs

	• The average customer loyalty level for an organisation • Variable costs, e.g., cost of sales, additional human resources required to fulfil objectives, additional materials required to fulfil objectives, internal/external market and stakeholder causes of variable costs, etc.
2.	• The costs that are typically incurred to support the ongoing management, servicing, and retention of customer accounts, e.g., customer service staff, technology and infrastructure, account manager salary/expenses, invoicing/billing, marketing activities, legal and compliance, office, insurance, data management storage/licenses etc. • How to analyse costs, e.g., the overheads or fixed costs allocated to the sales function, costs allocated to customer accounts, difference between fixed and variable costs, impact on customer profitability, organisation's management accounting procedures, familiarisation of management accounts to understand the full profitability etc. • Why it is important to follow established accounting procedures to ensure consistency and accuracy in financial reporting • How to develop and measure the profitability of a customer account for the selling organisation • How to use the average profitability previous sales to establish required performance to reach target • How to allocate costs against order value of customers and establish processes for regular updates and monitoring • How to use financial ratios to provide a structured framework for analysing and interpreting financial information, e.g., performance evaluation, financial health, profitability analysis, efficiency assessment, solvency, creditworthiness, determine appropriate credit limits; manage customer credit activities etc. • How to enable stakeholders to make informed decisions about a company's financial health, performance, and prospects etc.
3.	• The risks (business and financial) associated with customer accounts • How to create a risk profile covering key criteria using risk management assessment tools, e.g., ability to pay, when payment should arrive, cash flow management, how easy to manage, size of business, potential for growth, potential threats to the economic environment for the customer, etc. • How to evaluate the time and resources needed to service accounts • Why analysing risks associated with customer accounts helps in proactive risk management • How estimating the value of customer accounts aids in decision-making regarding resource allocation and prioritisation • How to review financial performance to identify trends and variances to make timely adjustments and develop mitigation strategies • Ways to collate financial information (lifetime value, profitability) with opinion research and direct feedback from customer/wider marketplace • The analysis techniques that are used to plot data over time periods and against other data • How to use variance analysis • How to establish a balance between external circumstances, organisational objectives and account profitability
4.	• How future financial performance predications for customer accounts help in strategic planning and resource allocation • How to develop contingency plans based on financial performance to mitigate potential risks • The key threats that could affect customers and the seller's organisation • How to develop contingency plans to address problems that may arise in customer financial performance • Who the major stakeholders are, what data they require, what information is provided by each stakeholder

	• The scenario planning, regular review and techniques to use to tackle problems, communication, research, change of approach etc. • How to identify and plan communication patterns and techniques for individual customer stakeholder groups • How to use the customer stakeholder power/interest matrix to establish level of activity and specific stakeholder needs • How to consult customer stakeholders to ensure alignment of the seller's financial strategies with broader organisational objectives

Assessor Guidance	
1.	Learners should select at least three customer accounts and estimate their potential lifetime value, and the sales volumes required to achieve their organisation's target profitability. They should provide evidence of monitoring the impact of variable costs on these three customer accounts over at least a three-month period.
2.	Learners should evaluate at least three fixed and three variable costs that relate to the three customer accounts that they covered in LO1. They should provide evidence to show how they have used customer account profit statements to measure ongoing performance. Evidence must include the use of financial ratios to provide a structured framework for analysing and interpreting financial information.
3.	Learners should analyse at least two business, and two financial risks associated with the three customer accounts that they have covered in LO1 and LO2. They should estimate the value of customer accounts and provide the financial and qualitative evidence that has informed their estimates. Key trends and variances should be provided for all three accounts.
4.	Learners should evaluate the future direction of the three accounts that they have covered in the other three LOs. They should provide at least two contingency plans related to customer financial performance (this may relate to other accounts). Evidence of consulting with at least three different customer stakeholders to gather financial performance data should be provided with a summary of the consultation process that they used.

Unit Title	L5B2 Organisational Sales Planning	
UAN	D/651/5976	
Level	5	
Credit Value	5	
Guided Learning Hours	25	
Learning Outcomes	**Assessment Criteria**	
1. Understand the relationship between sales forecasting and planning	1.1	Analyse how forecasting informs planning for growth through sales
	1.2	Evaluate how sales forecasting refines organisational sales planning
2. Understand organisational approaches to target setting	2.1	Compare approaches for sales planning
	2.2	Analyse the information available for setting sales targets
	2.3	Evaluate how plans for product and service development may impact sales targets
	2.4	Compare historical variances between sales targets versus actual sales
	2.5	Assess the reasons for variances and actions taken to respond
3. Be able to forecast sales at an organisational level	3.1	Apply forecasting methods to predict future sales trends
	3.2	Consult colleagues to gather their opinions related to sales forecasts
	3.3	Revise organisational sales forecasts based on feedback from colleagues

4. Be able to monitor sales targets	4.1	Develop methods to monitor actual performance against sales targets
	4.2	Assess organisational sales performance using quantitative and qualitative measures
	4.3	Revise organisational forecasts and sales targets based on monitoring activities

Additional Information	
Unit purpose and aims	To enable learners to understand the relationship between sales planning and forecasting. They will understand an organisational approach to target setting and be able to forecast sales at an organisational level. Learners will also be able to monitor sales targets.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K18 Leadership and management tools and techniques. S8 Use digital tools to analyse information and monitor performance and budgets to drive the implementation and delivery of plans and projects. S9 Research, interpret and analyse information to inform the implementation of business plans or projects. S13 Analyse and prioritise organisation activities in response to the operating environment. S21 Develop and implement operational plans B3 Takes accountability and ownership of their own and the team's tasks and workload. B5 Works flexibly and adapts to circumstances.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• How sales forecasting provides the foundation for sales planning, and sales planning guides and refines the forecasting process • How sales forecasting informs planning to assist organisations to set realistic sales goals and targets for individual salespeople and teams, and ensure alignment with the overall business objectives • How sales forecasting supports the efficient allocation of resources, e.g., budgeting for marketing campaigns, hiring new salespeople, investing in product development, based on the anticipated sales volume • How to develop contingency plans to address potential shortfalls or capitalise on unforeseen opportunities identified in the forecast • Sales planning - developing a roadmap including strategies, tactics, and actions for the sales team to follow in acquiring new customers, retaining existing ones, and maximising revenue to achieve the desired sales goals • How sales planning refines forecasting, e.g., as the sales team executes the planned activities, such as launching marketing campaigns, participating in trade shows, or conducting sales calls, they gather valuable real-time data that can be fed back into the forecasting process to refine the initial predictions and increase their accuracy over time • Why it is important that organisation's department plans and forecast work together in a continuous cycle to make informed decisions, optimise their collective efforts, and ultimately achieve their desired sales targets
2.	• The different approaches for sales planning and how to select the most suitable • The scope and accuracy of organisational information available for setting sales targets • How to access and assess data, e.g., customer records, market research, marketing environment predictions, product/service developments, pricing changes, finance records etc.

	• How organisational strategic objectives and sales targets translate to team and individual sales professional objectives on the sales forecast • How to evaluate plans for product/service development to understand how these may impact planned sales targets • Using historical data and feedback from a range of sources to match performance against forecast in previous sales periods • The reasons for variances • The actions that can be taken to respond to variances
3.	• The different forecasting methods that can be used to predict future sales trends, e.g. time series forecasting, regression analysis, causal forecasting, judgemental forecasting, top-down/bottom-up etc. • How to select the best forecasting method for an organisation depending on the specific circumstances, e.g., the availability of historical data, the complexity of the product or service, the level of accuracy required etc. • How to set up a formal process to gather opinions and input from relevant internal sources, e.g., via meetings, questionnaires and reporting etc. • Why it is important to revise organisational sales forecasts based on feedback from colleagues • How to predict future sales by considering historical data, market trends, competitor analysis, and other factors • How to estimate of the expected revenue and sales volume for a specific period
4.	• The methods that are used to monitor actual sales performance against sales targets, e.g., tracking key sales metrics, CRM reporting, sales dashboards and reports, regular sales team meetings etc. • Quantitative measures, e.g., revenue achieved, profits, sales per account, order numbers, new customers acquired, number of calls made, customer surveys and reporting, cost of acquisition, etc. • Qualitative measures, e.g., customer feedback, sales performance feedback, product and service knowledge, field visits, time management etc. • How to use the findings from analysis of monitoring data to improve forecasting and planning activities • How to revise forecasts and sales targets, including the people involved in the process

Assessor Guidance	
1.	Learners should analyse how sales forecasting provides the foundation for sales planning, and sales planning guides and refines the forecasting process, giving workplace examples to support their points.
2.	Learners should compare at least two different approaches to sales planning, reaching conclusions about which are most suitable for their organisation. They should analyse at least four types of information that can be used to set sales targets, drawing conclusions about how effective each is. They should identify at least one product or service development and evaluate how this may impact the agreed sales targets. To demonstrate their understanding of organisational approaches to target setting, they should compare at least two years of variances between sales targets and actual sales figures, providing rationale for the variances. They should assess the actions that were taken as a result of variances and draw conclusions about how effective these actions were, with suggestions for improvement in future years.
3.	Learners should apply at least one forecasting method to predict sales trends for a product/service. Consultation with colleagues should cover people at different levels and functions and should include documented evidence what their opinions. The feedback should be used to revise sales forecasts, with justification for any aspects that were not incorporated.
4.	Learners should develop at least two methods to monitor actual performance against sales targets. They should assess organisational performance using at least two quantitative and two qualitative

	measures. Evidence of revised forecasts that are based on their monitoring activities should be provided, with a brief explanation of their rationale for making changes.

Unit Title	L5B3 Market Research for Sales Strategy	
UAN	M/651/5980	
Level	5	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	**Assessment Criteria**	
1. Understand the role of market research for the sales function	1.1	Evaluate how market research helps sales leaders to understand their organisation's ideal customers
	1.2	Analyse how market research informs winning sales strategies
	1.3	Evaluate the impact of market research on customer relationships
2. Be able to use market research to develop sales strategy	2.1	Use market research to define and refine target markets for an organisation
	2.2	Create compelling value propositions based on market research
	2.3	Optimise organisational pricing strategy based on competitor pricing and customer price sensitivity
	2.4	Set team sales goals and objectives to respond to market trends

Additional Information	
Unit purpose and aims	To enable learners to understand market research and how it supports the sales function. Learners will use market research to develop sales strategy.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 5 Operations Manager Apprenticeship</u>** K5 IT and software tools used to support the current and future needs of the organisation, including advances in technology. K6 Methods for researching, analysing, interpreting and evaluating data to inform judgements and enable decision making. K11 The current and future needs of the sector and the impact on their organisation. K19 The sector in which the organisation operates and its impact on their role. S8 Use digital tools to analyse information and monitor performance and budgets to drive the implementation and delivery of plans and projects. S9 Research, interpret and analyse information to inform the implementation of business plans or projects. S15 Identify and respond to external factors that may influence the future landscape and evaluate their impact on the organisation.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• How market research helps sales leaders and managers identify and understand their ideal customers, e.g., demographics, needs, preferences, buying behaviour, pain points etc. • Types of primary research methods, e.g., surveys, interviews, focus groups, product/service use records etc. • Types of secondary research, e.g., industry research, government data, news articles, academic journals etc. • How to combine primary and secondary research, and qualitative and quantitative methods, to gain a comprehensive understanding of the market and target customers • The importance of market research to help sales teams to tailor their approaches, messaging, and communication style to resonate with target customers

	• How market research informs the development of winning sales strategies by uncovering market trends, competitor analysis, and pricing strategies • The relevant information about customer perceptions, objections, and buying triggers that market research can reveal and how to apply this knowledge in sales strategy • The research methods that can be adopted to create compelling sales messages that draw on the findings of market research to address customer needs to lead to conversions, e.g., address concerns, highlight specific product/service benefits, align to business objectives etc. • The limitations of market research • How market research can help identify emerging markets, new customer segments, and unmet customer needs • The ways that market research can reveal customer satisfaction levels and areas for improvement to improve the relationships with them
2.	• How to source market research data that is valid, reliable and sufficient • How to ensure organisational and individual compliance with relevant data protection guidelines • The importance of keeping up to date with data protection guidelines • The techniques that can be used to analyse a range of data types • The people involved market research planning, gathering information, and analysis in organisations • How to define and refine target markets, e.g., by analysing customer demographics, buying behaviours, needs to identify ideal customer profiles etc. • Using market research information to segment target markets into distinct groups with similar characteristics, allowing for tailored sales strategy for each segment • Why it is important to regularly revisit and refine target market definitions based on ongoing market research to ensure continued alignment with market trends • How to create compelling value propositions that understand customer pain points and desired outcomes, explain how the products/services directly address customer needs and solves their specific problem • How to test and refine messaging based on customer feedback • Why it is important to set realistic sales goals and objectives for the team and individuals that are based on realistic information and analysis • The methods that can be used to analyse market size, growth potential, and competitor activity to set realistic sales goals and objectives • How to consider historical sales data alongside market research insights to create achievable targets that motivate the sales team • How to keep informed about emerging market trends, technological advancements, and changing customer preferences through continuous market research • The importance of adapting the sales strategy to capitalise on new opportunities presented by trends and mitigate potential risks • How to align pricing strategy to value propositions • How to optimise pricing strategies to maximise success • The methods used to analyse competitor pricing and customer price sensitivity to inform the pricing strategy • The techniques used to conduct price elasticity research to understand how price changes may affect demand for the organisation's product/service • Why it is important to make informed pricing decisions that balance profitability with market competitiveness

Assessor Guidance	
1.	Learners should evaluate both primary and secondary market sources to draw conclusions about how market research can support leaders understanding the seller organisation's ideal customers. They should analyse at least three aspects of market research that inform winning sales strategies,

	giving relevant workplace examples to support their points. Learners should also identify at least three ways that market research impacts customer relationships using workplace examples.
2.	Learners should draw on the key findings of market research to define and refine target markets for at least two of their organisation's products/services. Compelling value propositions should be produced for at least two target customers. The learners should use research about value-based pricing, competitor pricing and customer price sensitivity to optimise the seller's organisational pricing strategy, with rationale provided for changes that they have made. They should set goals and objectives for their sales team that cover a period of at least three months, and clearly align with the findings of market research about current trends.

Unit Title	L5B4 Manage Sales Technology Systems	
UAN	F/651/5977	
Level	5	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand the functional requirements of sales technology systems	1.1	Analyse organisational sales information requirements
	1.2	Evaluate the functionality of sales technology systems to meet organisational sales information requirements
	1.3	Compare different sales systems to determine their ability to meet sales function needs
2. Understand how to train and support system users	2.1	Identify the training and support needs of sales team members
	2.2	Agree learning and development approaches to meet identified sales team needs
	2.3	Provide access to resources to support system users
3. Be able to monitor sales technology system effectiveness	3.1	Define Key Performance Indicators (KPIs) related to system and user performance
	3.2	Monitor the effectiveness of sales technology systems usage
	3.3	Gather feedback from system users to identify potential areas for improvement
4. Be able to ensure the effective usage of sales technology systems	4.1	Analyse the effectiveness of sales technology systems to support sales function success
	4.2	Identify improvements to sales technology systems
	4.3	Implement improvements to enhance the effectiveness of sales technology systems usage

Additional Information	
Unit purpose and aims	To enable learners to understand the requirements of sales technology systems. They will understand how to train and support system users and be able to monitor sales technology effectiveness. Learners will ensure effective use of sales technology systems to support the sales function.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K2 Relevant regulation and legislation requirements, and their impact on their team, the individual, their role and the organisation. K5 IT and software tools used to support the current and future needs of the organisation, including advances in technology. K18 Leadership and management tools and techniques. S5 Manage and influence project activity to deliver within budget and resource requirements. S8 Use digital tools to analyse information and monitor performance and budgets to drive the implementation and delivery of plans and projects. S10 Evaluate the impact of outcomes from organisational plans or projects to drive the decision-making process.

		S12 Manage continuous improvement and change for their team and organisation. B4 Seeks learning opportunities and continuous professional development for self and the wider team.
Location of the unit within the Ofqual subject/sector classification system		15.4 - Marketing and Sales
Indicative Content		
1.	• The types of sales information that organisations use, e.g., organisation sales technology strategy and objectives, legislation, regulations, codes of practice, information about customers, customer sales/buying/delivery habits, cross and up selling opportunities, target customers, sales and promotional activities, preferred communication methods etc. • The current sales systems functionality of an organisation, e.g., existing system(s) used, usefulness of information, compatibility with sales information needs, ability to meet current and future needs, enhancements identified etc. • Different sales technology systems and the information available, e.g., CRM, data leads/prospecting processes, customer details, contact data, sales activity tracking, associated systems etc.	
2.	• The importance of providing up to date guidance to system users • The types of guidance available for users • The range of skills development activities to meet users differing levels of experience and needs • How to offer ongoing support and resources to address any questions or issues that arise during system usage • How to ensure that all relevant sales team members are properly trained to use the sales technology systems effectively • The importance of monitoring how systems are used to achieve consistency in reporting outputs	
3.	• How to define measures such as key performance indicators (KPIs), objectives and key results (OKRs) related to system performance, e.g., uptime, response time, user activity metrics etc. • Ways to regularly monitor the use of sales technology systems using tools to provide real-time insights into system performance, user activity, and potential issues to ensure the system is meeting performance expectations • How to ensure operational effectiveness of sales technology systems • The maintenance and updating of system information in line with relevant/required procedures, organisation protocols, standards for information management etc. • The relevant sales technology systems processes and procedures, e.g., inputting, maintaining, updating and removing data, levels of data, access to data, administration rights, how information is protected, stored and managed etc. • Data reliability, e.g., trustworthy, sufficient, valid etc. • The legal, ethical and organisational issues related to the use of sales activity information • How to monitor system operations, e.g., review user processing skills, review operating ability, check objectives being met, review system requirements, review generated reports, value of sales technology system against sales strategy, system performance, value/usefulness of information/data stored, coherent sales intelligence, future needs etc. • The importance of ongoing technological advances to assist/ improve the management of data e.g. social media communities, integration with other systems, etc. • How to review system logs and generate reports on a regular basis to identify any patterns or trends that may indicate issues or areas for improvement • Ways to analyse historical data to predicting potential future issues • The importance of performing regular audits of sales technology systems to ensure compliance with security protocols, data integrity, and system configurations, to help identify vulnerabilities and areas for optimisation	

	• How to gather feedback from sales team members about their experience with using the sales technology system to carry out their roles • Using feedback to identify areas for improvement and make necessary adjustments to enhance system usability and effectiveness
4.	• How to review sales systems usage performance and define future requirements • How to develop plans for required changes to sales technology systems • The techniques that are used to review system/user requirements to meet organisational and sales function needs • How to access and critically review generated reports • The importance of ensuring communications between different technology systems • How to engage colleagues and stakeholders in improvement processes

Assessor Guidance	
1.	Learners should analyse at least five aspects of their organisation's sales information requirements, giving examples of how the information is used to support their points. Their analysis should be used as a framework to evaluate and compare how effectively at least two different sales technology systems can meet organisational needs. This should include the system(s) that are currently used.
2.	Learners should conduct an analysis of at least three team members training and support needs in relation to the current technology systems used by the organisation. Once needs have been identified, learners must agree how these needs will be met via training and support. Note that the learner does not have to provide training/support at this level, just ensure that it is provided by relevant people and resources such as the L&D team, line managers, team mentors/coaches, online guidelines and examples etc.
3.	Learners should define at least three KPIs related to system performance and then provide evidence of monitoring against these. Systems reports should be included in evidence with accompanying notes to illustrate how these were used, and the actions taken as a result. Evidence of gathering feedback from at least three different systems users should be provided.
4.	Learners should document identified improvements that are based on their analysis of sales technology effectiveness and provide supporting evidence from workplace activities to show how changes were implemented to enhance systems usage.

Unit Title	L5B5 Relationship Management Mapping	
UAN	R/651/5981	
Level	5	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to develop strategies for effective multi-disciplinary supplier and customer relationship mapping	1.1	Evaluate the role of multi-disciplinary relationship management mapping in achieving business objectives
	1.2	Define the concept of relationship mapping and its relevance to sales management
	1.3	Analyse the benefits and challenges of relationship management mapping in a business context
	1.4	Identify and categorise key stakeholders in the sales process
	1.5	Design a relationship map for a specific sales context, incorporating appropriate tools and techniques
2. Be able to implement relationship management mapping engagement for a key account	2.1	Develop a relationship management mapping plan tailored for a key account
	2.2	Demonstrate how to build and maintain relationships with stakeholders
	3.1	Establish key performance indicators (KPIs) for sales relationship management

3.	Be able to monitor relationship management for continuous improvement	3.2	Evaluate the effectiveness of relationship management engagement and suggest improvements
		3.3	Assess the outcomes of relationship management activities and implement actions for continuous improvement

Additional Information	
Unit purpose and aims	To enable learners to understand the principles of relationship management mapping in sales and how to develop strategies for effective relationship mapping. Learners will implement relationship management mapping strategies and monitor outcomes for continuous improvement.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K10 Methods used to identify, manage and prioritise stakeholder relationships. K15 Communication techniques and approaches. S12 Manage continuous improvement and change for their team and organisation. S16 Influence and negotiate with stakeholders to shape and agree goals and outcomes. S17 Manage relationships across multiple and diverse stakeholders. B1 Acts professionally, ethically and with integrity. B2 Supports an inclusive culture, treating colleagues and stakeholders fairly and with respect.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The strategic importance of relationship management mapping for sales success • How to enhance customer loyalty and retention through effective relationship management • Ways to build trust and rapport with customers to drive sales growth • Case studies of companies that have successfully leveraged relationship management mapping to ensure long-term commercial relationships • The key components of relationship management • Customer relationship management (CRM) systems and their functionalities • The techniques used to understand customer needs and preferences • The methods that can be used to personalise customer interactions • The importance of communication and feedback loops in maintaining relationships • The role of customer data and analytics in informing relationship strategies • The advantages of relationship management, e.g., increased customer satisfaction, higher sales conversion rates, improved client retention, enhanced reputation etc. • The challenges of relationship management, e.g., resource allocation, maintaining consistent communication, managing diverse client needs, integrating relationship management with other business processes, balancing conflicting priorities etc. • The solutions and best practices for overcoming common challenges in relationship management
2.	• The definition and objectives of relationship mapping • How to use relationship mapping as a strategic tool for identifying and leveraging key relationships • The difference between relationship mapping and other sales strategies • The techniques for identifying key stakeholders in the sales process. • How to categorise stakeholders by influence, interest, and importance • How to develop understanding of different stakeholder needs and expectations • The tools for stakeholder analysis (e.g., power/interest grids, influence maps)

	• How to create a relationship map and the stages involved, e.g., data collection, stakeholder identification, mapping relationships etc. • How to use of software tools and templates for relationship mapping • How to visually represent relationships and interactions with different stakeholders • How to incorporate feedback and updates to keep the relationship map current and relevant
3.	• The components of a comprehensive relationship management plan • How to set clear, measurable objectives and goals • How to identify resources and tools needed for relationship plan implementation • The factors that need to be considered when setting timelines and milestones for relationship management activities • What effective relationship management plans look like as they are developed and implemented • The strategies that are used for initiating contact with new clients and stakeholders • The behaviours and techniques that nurture and build ongoing relationships • How to leverage networking opportunities and industry events to build relationships • The role of communication channels, e.g., email, phone, social media, in relationship management • How to address and resolve conflicts or issues in client relationships • The methods that can be used to evaluate the effectiveness of relationship management efforts • How to gather and analyse client feedback and satisfaction data • How to identify areas for improvement and make necessary adjustments
4.	• The importance of KPIs in measuring relationship management success • The commonly used KPIs for relationship management, e.g., customer satisfaction scores, retention rates, sales growth, client engagement metrics etc. • The ways that achievable KPI targets are set • The tools and techniques for tracking relationship management activities • How to use of CRM systems for monitoring client interactions and outcomes • How to regularly review and analyse relationship management data • The importance of consistency and regularity in monitoring efforts • The methods for critically evaluating relationship management outcomes • The techniques for gathering and analysing performance data • How to identify strengths and development areas in current relationship management practices • How to implement changes and improvements based on evaluation findings

Assessor Guidance	
1.	Learners should evaluate the strategic importance of relationship management in sales, with at least three examples to illustrate the practical application and benefits of relationship management. They should identify and discuss the key components of relationship management, explaining how these components impact sales performance, with workplace examples. Learners should evaluate at least two benefits and two challenges of relationship management.
2.	Learners should clearly define relationship mapping and explain its purpose in the context of sales management. They should identify key stakeholders involved in the sales process for one account and categorise these stakeholders using appropriate tools, giving workplace examples to justify their approach. Learners should create a detailed relationship map for a sales scenario to visually represent key relationships and interactions, supported by relevant data and examples.
3.	Learners should design a comprehensive relationship management plan for a key account that includes clear objectives, timelines, and resource allocation. They should provide evidence of at least three techniques that they have used to initiate, build, and maintain relationships with stakeholders.

	Learners should assess the success of implemented relationship management strategies using appropriate evaluation methods. They should identify areas for improvement and provide recommendations, supported by examples from best practices.
4.	Learners should define at least three relevant KPIs to measure the success of relationship management efforts. They should demonstrate the use of tools and techniques to track relationship management activities, giving examples of how these monitoring methods help maintain consistent relationship management efforts. Learners should evaluate the outcomes of their relationship management strategies, using performance data and feedback. They must identify at least two strengths and two development areas, with recommendations for continuous improvement for each.

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	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 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.

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	Not linked to the apprenticeship standard.
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.

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	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 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

Unit Title	L5C1 Tender Management	
UAN	T/651/5982	
Level	5	
Credit Value	5	
Guided Learning Hours	25	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to identify tender opportunities	1.1	Evaluate the methods used to identify tender opportunities
	1.2	Analyse how to influence different types of requests
	1.3	Analyse the process for deciding whether a response should be submitted
	1.4	Explain how to communicate a no-tender to a customer
2. Understand tender management principles	2.1	Analyse the components and stages of tender management
	2.2	Compare tender cycles for different opportunities
	2.3	Evaluate organisational processes for preparing tenders
3. Be able to prepare to tender	3.1	Define a tender strategy
	3.2	Create a plan to respond to a tender with colleagues
4. Be able to write and submit a tender to offer products/services	4.1	Produce a tender to meet the needs of the opportunity and own organisation
	4.2	Submit a tender by the deadline using the specified format
	4.3	Implement post-tender activities to review the process and outcomes

Additional Information	
Unit purpose and aims	To enable learners to understand how to identify tender opportunities and the key principles of tendering. Learners will be able to prepare, write and submit a tender to offer products/services.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K10 Methods used to identify, manage and prioritise stakeholder relationships. S13 Analyse and prioritise organisation activities in response to the operating environment. S15 Identify and respond to external factors that may influence the future landscape and evaluate their impact on the organisation.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The key methods that salespeople use to identify tender opportunities, e.g., private and public sector procurement portals, third party aggregators, networking, industry events, news articles, trade publications, competitive intelligence, market research, existing customers, internal sources etc. • How to influence tender opportunities, e.g., RFI (Request for Information), RFP (Request for Proposal), RFQ (Request for Quotation) • The processes involved in deciding whether to respond to a tender opportunity, e.g., initial qualification (align with organisational capabilities, profitability potential, potential to win), detailed evaluation (project complexity, tender documents review, competitor analysis), resource allocation (cost of preparing the tender response, impact on existing workload), final decision (internal team input, leadership presentation and approval) etc. • How to use tact and transparency when communicating a no-tender to customers to preserve the relationship for future opportunities, e.g., choose an appropriate communication channel, express appreciation, clear and direct message, offer a reason (resource constraints, project fit, budgetary mismatch etc.), maintain a positive tone etc.

2.	• The range of active and passive methods used to identify tender opportunities • The typical tender cycles for different opportunities from receipt of tender requirements, decision to tender/not tender, preparation, plan, submission and final evaluation • The reasons why tender cycles vary and how to respond accordingly • How to identify the information required, stakeholders, planning requirements, needs and risk analysis etc. • How to differentiate a tender response from competitors • The processes for allocating resources, delivering to deadline, reviewing and learning from the tendering process • The organisation's organisational processes and people that support tender responses, and the current success rate • The level of management commitment and involvement in tender processes • How to assess the tendering skill levels of staff • The benefits of setting up a tender team and how manage contributions • How to analyse the key benefits a customer hope to achieve and why they are using a tender process • How to qualify opportunities using organisational qualifying criteria • How to make bid/no bid decisions based on key criteria, e.g., profit, value, risk assessment, other benefits etc. • How to analyse competitors based on their key competencies, ability to meet customer needs, and major differences
3.	• The strategic choices for defining a tender strategy, e.g., tackling customer's set criteria, developing uniqueness, when and how to use partners and alliances etc. • The key elements of a tender plan to deliver all aspects of customer criteria • The benefits of appointing a tender manager/controller • How to satisfy core elements of a tender, and add differentiating factors • Why it is important to determine how to manage resources • How to conduct a financial assessment during tender planning and the sources of organisational support, e.g., finance team • How to calculate the value to organisation over the lifetime of the contract
4.	• The submission and review processes that different organisations use for tenders and how to meet their requirements • The structure of responses and how to comply with any specified tendering procedure • The elements that make a tender submission stand out during the evaluation process • The additional stages of a tendering process that may be required, e.g., presentation, demonstration, Q&A etc. • How to evaluate the strengths and development areas from successful and unsuccessful tenders • The approaches that are used for capturing lessons learned in an organisation to improve future submissions

Assessor Guidance	
1.	Learners should evaluate at least four methods that are used by their organisation to identify tender opportunities. They should analyse how RFI (Request for Information), RFP (Request for Proposal), and RFQ (Request for Quotation) differ, and what they can do to influence each type of request. Learners should analyse their own organisations qualifying criteria and processes for making bid/no bid decisions and detail the approach that should be taken to communicate a no bid to a customer that preserves the relationship for future opportunities.
2.	Learners should outline the stages of tender management and analyse at least five components of the full process. They should compare the tender cycles for three different opportunities and draw

	conclusions about the strengths and challenges that the organisation may face for each using their current processes and resources (including people).
3.	Learners should define their tender strategy for an opportunity which includes a rationale for targeting the opportunity, team roles, and their organisation's competitive advantage. Their plan should be developed using agile project working methods and should include information and quality management processes to respond effectively within the required deadlines.
4.	Learners should produce a tender submission that illustrates how the needs of the customer and their organisation have been met. Evidence of submitting the deadline using the required processes and deadline should be provided. It is likely the learners will work with colleagues on the tender, and they should clearly state which aspects of the evidence re their own work. Learners should also evidence the activities that they have carried out after submitting the bid to review the process, including asking for feedback from the potential customer.

Unit Title	L5C2 Sales Territory Management	
UAN	Y/651/5983	
Level	5	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand sales territory design	1.1	Evaluate the rationale for the design of organisation sales territories
	1.2	Analyse territory design methods
	1.3	Compare competitor territory structures
2. Understand the factors that impact on sales territory management	2.1	Identify the key drivers for an organisation's territory management approach
	2.2	Analyse organisational sales territory management approaches
	2.3	Evaluate alternative territory options for an organisation
3. Be able to review and improve organisational sales territories	3.1	Assess an organisation's current sales territories
	3.2	Analyse the resources needed to cover each territory to meet targets
	3.3	Evaluate the risks and benefits of defining new sales territories
	3.4	Assess the performance of sales territories and adjust to improve team performance
4. Be able to organise resources to manage sales territories	4.1	Plan territory resource requirements based on valid data
	4.2	Assign sales territory resources
	4.3	Set sales activity and financial targets for sales team members
	4.4	Monitor team performance and provide regular feedback

Additional Information	
Unit purpose and aims	To enable learners to understand sales territory design and that factors that impact their management. Learners will review organisational sales territories and organise resources to manage and adapt them.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K4 Approaches to people management, for example recruitment, performance management, reward, and talent management and resource planning. K6 Methods for researching, analysing, interpreting and evaluating data to inform judgements and enable decision making. K7 Financial management techniques and implications of decisions for budgets. K15 Communication techniques and approaches. K18 Leadership and management tools and techniques.

		K19 The sector in which the organisation operates and its impact on their role. K20 The continuous development requirements and learning needs of their team. K25 The strategic direction of the organisation and the impact on operational plans. S3 Manage and set goals and accountabilities for individuals and teams. S4 Analyse performance data for individuals and teams to identify areas for improvement. S8 Use digital tools to analyse information and monitor performance and budgets to drive the implementation and delivery of plans and projects. S13 Analyse and prioritise organisation activities in response to the operating environment. S15 Identify and respond to external factors that may influence the future landscape and evaluate their impact on the organisation. B2 Supports an inclusive culture, treating colleagues and stakeholders fairly and with respect. B3 Takes accountability and ownership of their own and the team's tasks and workload.
Location of the unit within the Ofqual subject/sector classification system		15.4 - Marketing and Sales
Indicative Content		
1.	• The ways that organisations design their sales territories and the associated rationale for the approaches selected • The range of territory design approaches, e.g., geography, industry, size of customer accounts, account value, product etc. • How to design and refine territories using data and analytics, e.g., customer data, sales history, market research etc. • The organisational strategies used to break down the target market into smaller more manageable groups with similar needs • The variables used to segment the market to design territories • How to review territory in relation to customer activity, new customers, target achievement, competitor activity etc. • Ways to calculate territory turnover from historical data or similar account size measurements • How to measure the of number of customers and call frequency against average weekly call rate and working weeks per year • How to incorporate growth potential and environmental factors to predict potential when designing a territory • The territory planning criteria that are used by competitors and how these compare with own organisation's approach • How to balance workload and opportunity, e.g., similar number of high-potential accounts, equal effort to cover, opportunities for all salespeople to achieve their quotas etc. • How to balance travel time and time spent with customers • The costs associated with workload management for a territory and predicted value	
2.	• The key drivers for an organisation's territory management approach, e.g., customer analysis, strategic alignment, resource optimisation, market dynamics, performance measurement/review etc. • The rationale for selecting and retaining territory management approaches • How to establish criteria for customer assessment, e.g., size, product/service purchase, purchase history, strength of relationship, environmental factors etc. • The importance of reviewing successful territories the identify the key success factors • How organisational, team and individual objectives influence the territory management approach	

	• The benefits and limitations of benchmarking • The performance measures used during territory management, e.g., balanced scorecard, KPI's, individual performance management, assessments etc. • How to establish performance criteria to track how the sales team delivers to organisational targets • Why regular reviews are important to assess territory potential and any associated workload changes • How to assess the costs to service customers against likely business potential • Seeking feedback from the sales team about territories and adapting plans based on their experiences and market changes
3.	• The framework for assessing sales territories to gather data and analyse it through multiple lens • How to define the organisation's target market based on internal factors, e.g., customer alignment with goals, values etc. • How to define the organisation's target market based on external factors, e.g., demographics, competition, trends etc. • The techniques that can be used to assess an organisation's current sales territories based on own organisation's criteria, external market information and sales forecasts • How to use PESTLE and SWOT to provide insights • The role of technology and impact on management efficiency • The direct and indirect costs involved in different territory designs • How to assess the benefits of making changes to management approaches, e.g., the achievement of targets, better use of resources, the right team members doing the right work etc. • How to assess the risks of making changes to management approaches, e.g., disruption to customers, unsettlement of team individuals, need to upgrade skills etc. • How to gather data insights to assess the performance of sales territories, e.g., sales volume and revenue, conversion rates, customer satisfaction, market research, economic data, demographic data etc. • The quantitative and qualitative performance metrics that support decision making, e.g., profit margin, conversion rates, sales cycle length, sales professional feedback etc.
4.	• The territory planning techniques used to match resources to marketplace and customer need • How to calculate resources based on territory spread, number of customers and visit frequency • How to align territory plans with the wider objectives of the organisation • How to assign sales territories based on sales team individual's knowledge, abilities, skills, strengths and experience • The benefits of knowing team members experience and motivators when assigning territories • The factors related to assigning territory resources, e.g., sales team workloads, budgets, number and type of customer accounts etc. • Why it is important to consider travel and logistics, e.g., factor in travel time and feasibility when assigning territories • The importance of allocating work fairly to motivate the team, e.g., comparable workloads, potential revenue etc. • Ways to communicate territory changes effectively to the sales team, respond to questions, and address any concerns • How to communicate new territory boundaries and reasoning to each team member using one to one and team meetings • How to establish S.M.A.R.T. goals (Specific, Measurable, Achievable, Relevant, and Time-bound) for each territory, with relevant success measures • How to set targets for territories based on their potential • The role of salary and commission in team and individual targets • How to set targets for individual team members based on activity, history and sale potential • How to set targets to achieve overall team and organisation sales targets

Assessor Guidance	
1.	Learners should select one organisation (this may be their own or another) and evaluate why they have designed the sales territories in the way that they have, providing their own opinions about their choices. They must analyse at least three different territory design methods, drawing conclusions about how suitable each is for their own organisation. Their comparison of competitor territory structures should be based on the territory structure for their own organisation, comparing this with at least two competitor organisations. Workplace examples should be provided, and the learner should draw conclusions about which approaches are most effective.
2.	Learners should identify at least three key drivers for their organisation's territory management approach, providing rationale for why these are important. They should analyse the current approach used by their organisation considering size, location, customer numbers, prospective accounts, and number of contacts (other aspects may also be included). In their evaluation of alternative options for territory management, learners should propose at least two other approaches that could be adopted, and investigate their viability by considering the financial, economic and external marketing environments of each.
3.	Learners should gather data and analyse it through multiple lens to assess an organisation's current sales territories. This should include analysing the human, technology and operational resources required to ensure that each territory meets the targets set. Learners should analyse at least three risks and three benefits of defining new territories. They should provide evidence of assessing the performance of their team's territories over at least a three-month period, showing how they have adjusted them to improve team performance. This may include defining new boundaries.
4.	Learners should use at least three data sources to plan their team's territory resource requirements. They should provide evidence of assigning sales territory resources to team members and agreeing sales activities and financial targets with them. Learners should provide documented evidence of monitoring territory performance over a three-month period and of giving feedback to all team members monthly.

Unit Title	L5C3 Account Relationship Management	
UAN	A/651/5984	
Level	5	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to build key account relationships	1.1	Explain the information required by the organisation for key accounts
	1.2	Evaluate the knowledge, skills and behaviours that build trust with key accounts
	1.3	Analyse methods to improve key account productivity, profitability and loyalty
	1.4	Evaluate the personal characteristics used to build relationships
2. Understand strategic sales networking	2.1	Evaluate methods for building sales networks
	2.2	Analyse the factors that build long term customer relationships
	2.3	Evaluate the communication methods used for networking
3. Be able to implement a consultative selling approach	3.1	Identify organisations suitable for consultative selling
	3.2	Implement methods for establishing own credentials with an organisation
	3.3	Develop strategic questions to identify customer challenges
	3.4	Propose solutions to address customer challenges
	3.5	Use relationship maps and team selling to maximise engagement and impact
	4.1	Monitor and control team relationship management activities following organisational requirements

4.	Be able to monitor and improve customer relationships	4.2	Gather formal and informal feedback about key accounts from a range of sources
		4.3	Analyse the data gathered during monitoring and control activities to action improvements

Additional Information	
Unit purpose and aims	To enable learners to understand how to build key account relationships and strategic sales networking. Learners will implement a consultative selling approach, monitoring and improving customer relationships.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K10 Methods used to identify, manage and prioritise stakeholder relationships. K11 The current and future needs of the sector and the impact on their organisation. K13 Influencing and negotiation models and techniques. K15 Communication techniques and approaches. K22 Organisational policies and procedures, for example health and safety. S1 Communicate and present information to stakeholders using different types of media. S2 Identify problems and provide solutions. S8 Use digital tools to analyse information and monitor performance and budgets to drive the implementation and delivery of plans and projects. S9 Research, interpret and analyse information to inform the implementation of business plans or projects. S12 Manage continuous improvement and change for their team and organisation. S16 Influence and negotiate with stakeholders to shape and agree goals and outcomes. S17 Manage relationships across multiple and diverse stakeholders. B1 Manage and facilitate learning and continuous professional development for their team. B4 Seeks learning opportunities and continuous professional development for self and the wider team. B5 Works flexibly and adapts to circumstances. B6 Works collaboratively with others across the organisation and stakeholders.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The types of information that organisation's use to identify and manage key accounts • The organisational criteria for defining a key customer account • How key accounts contribute to the sustainable competitive advantage of organisations • The knowledge and skills that help to develop trust with key accounts, e.g., industry knowledge, product/service knowledge, rapport building, problem solving, accountability, transparency etc. • The personal characteristics that help to build relationships, e.g., honesty, empathy, openness and sharing of aims and objectives. • The relevant sector, legal and product knowledge required to manage accounts effectively • The methods used to analyse the performance of key accounts • The measures used to identify loyal customers • How to assess the financial efficiency of key accounts using a range of measures

	The techniques used to improve the financial efficiency of key accounts, e.g., knowledge of where costs are incurred and how to reduce costs using technology, investment in process etc. • The characteristics that are used to build personal relationships, e.g., trust, clear communication, empathy, respect, support, honesty, patience, mutual interests, compromise, forgiveness, reliability, positive attitude, adaptability, shared goals etc.
2.	• The methods that are used to build networks, e.g., building an online presence, attending industry events, participation in online communities, leverage existing relationships, share insights, provide events etc. • The importance of matching networking activities to personality and preferences • How to assess the effectiveness and efficiency of networks • The factors that build long-term relationships, e.g., focus on value, proactive communication, personalised approaches (such as birthday greetings), celebrating mutual successes etc. • When and how to change networking methods • How to develop a personal network of contacts to meet current and future needs for information, resources and sales opportunities • The importance of reciprocity and confidentiality in networking activities • How to use technology, industry journals, sector events, profile raising, exhibitions, social networking and direct approaches to build and maintain networks • The importance of regular communication that adds value to customers • The different opportunities available to communication with personal networks, e.g., conferences, social events, business networks, social media, email, messaging, newsletters etc.
3.	• The definition of consultative selling and how it differs from other sales methods • How to use a CRM system to identify features of organisations that currently purchase from the organisation who are potential key accounts • The key attributes necessary and desirable in prospective customer organisations to identify them as key accounts • How to use industry journals, sector research, companies house, exhibitions and networking as part of consultative selling • Ways to establish credibility, e.g., through sector leadership, thought leadership, awards etc. • When and how to use third parties for introductions • The interpersonal skills that encourage customers to share their issues openly • The importance of confidentiality • The range of questioning techniques that can be used during consultation conversations, e.g., SIIS (situation, issue, implication, solution), SPIN (situation, problem, implication, need pay-off) etc. • Codes of practices related to consultation processes • How to quantify, in financial and strategic terms, the effects of the most important customer issue or opportunity • How to prioritise issues, e.g., based on financial and non-financial impacts, fit with strategic objectives etc. • How to build relationship maps and organise team selling activities for maximum engagement and impact
4.	• How customer retention, account profitability and growth is recorded in the organisations • The key performance indicators (KPI's) for individual account managers that reflect relationship management activities • What to measure in relation to the achievement of own organisations strategic objectives • How to use external research for objective feedback, and where to access this • The options that are available internally to gather and capture information, e.g., online surveys, ad hoc verbal feedback, collation of information from other departments etc.

	• How information is gathered and analysed in different areas of the organisation to inform strategic decisions and relationship expansion

Assessor Guidance	
1.	Learners should explain all types of information that their organisation uses related to key customer accounts, including why each is important. They should evaluate at least three aspects of knowledge, three skills and three behaviours that key account managers require to be successful, giving workplace examples to support their points. Learner should analyse at least three methods that can be used to improve key account productivity, two methods to improve profitability, and two methods that improve customer loyalty, with supporting examples. They should evaluate at least five characteristics that can be used to build personal relationships.
2.	Learners should evaluate at least three methods for building sales networks, including examples of how effectively these work for themselves, and different individuals within the team. They should analyse at least three factors that build long term relationships giving workplace examples to support their points. Learners should evaluate all the communication methods that their organisation uses to develop and maintain networks, drawing conclusions about how and when to use these to be most effective.
3.	Learners should use their organisation's CRM/records system to identify potential key accounts. They should identify at least two methods to establish personal credibility with the identified accounts and implement them to build the relationships for consultative selling. Their approach should include preparing at least five questions to identify customers challenges/pain points and they should propose solutions to address these using the responses and other information provided by the customer. Learners should demonstrate how they have used relationship maps and team selling to maximise engagement and impact in their account management.
4.	Learners should explain their organisation's requirements for their team's relationship management monitoring and control, with evidence to demonstrate that they have followed this over a three-month period. They should gather both formal and informal feedback from at least two key accounts over this period, using a range of information sources. Evidence of actions taken as a result of their analysis of the information gathered should be provided.

Unit Title	L5C4 Customer Buying Processes and Practices	
UAN	D/651/5985	
Level	5	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand customer buying processes and practices	1.1	Analyse the internal and external factors that influence customer buying practices
	1.2	Evaluate measures of quality related to customer buying decisions
	1.3	Review the capability and capacity assessments customers undertake on potential suppliers
2. Understand how to differentiate offer to maximise value for customers	2.1	Analyse organisational account planning activities
	2.2	Evaluate own organisation's abilities to respond to different customer requirements
	2.3	Explore the organisational benefits of 'preferred supplier' status
	2.4	Evaluate how the organisation's technical and resource support adds value for customers
3. Be able to plan the development of current and potential customer accounts	3.1	Review approaches for developing and winning new accounts
	3.2	Summarise the organisational benefits of customer account monitoring
	3.3	Assess own customer accounts
	3.4	Create a plan to develop current and new customer accounts

<table>
<tr><th colspan="2">Additional Information</th></tr>
<tr><td>Unit purpose and aims</td><td>To enable learners to understand customer buying processes and practices, and how to differentiate offers to maximise value for customers. Learners will plan the development of current and potential customer accounts.</td></tr>
<tr><td>Details of the relationship between the unit and apprenticeship standards</td><td><u>Level 5 Operations Manager Apprenticeship</u>
K10 Methods used to identify, manage and prioritise stakeholder relationships.
K11 The current and future needs of the sector and the impact on their organisation.
K19 The sector in which the organisation operates and its impact on their role.
K22 Organisational policies and procedures, for example health and safety.
S15 Identify and respond to external factors that may influence the future landscape and evaluate their impact on the organisation.
S18 Deliver sustainable services and solutions which allow the organisation to respond to changes in social, economic and environmental factors.
S21 Develop and implement operational plans that align with the strategic direction of the organisation.
B5 Works flexibly and adapts to circumstances.</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><th colspan="2">Indicative Content</th></tr>
<tr><td>1.</td><td>The people in the DMU, their roles and influences, the internal culture and existing buying processes
The organisational and personal influences of the customer decision making unit (DMU) on buying practices
The internal factors that influence customer buying practices, e.g., improving efficiency, reducing costs, increasing productivity, complying with regulations, brand perceptions, decision making processes and style, experiences of the seller organisation, differing decision maker needs etc.
The external factors that influence customer buying practices, e.g., economic climate, interest rates, government regulations, emerging technologies, sustainability concerns, shifting demographics, market trends, competitor offerings etc.
How to identify and interpret the internal and external factors that influence the buying process
The current trends in buying practices and implications for supplier organisations
How to use a PESTLE analysis to identify the wider environmental influence that affect buying practises
How quality standards, e.g., ISO9001, apply to customers sales and purchasing decisions
The capability and capacity assessments that customers may undertake, e.g., - sufficient resources, qualified people, financial stability, service commitment, delivery and quality, policies in relation to the environment and waste, staff development, organisational values, corporate social responsibility etc.</td></tr>
<tr><td>2.</td><td>Different account planning approaches, e.g., Kotler’s Cranfield model
The tools that support offer differentiation, e.g., SWOT, Porter’s Growth strategy, Ansoff Growth matrix, balanced scorecard etc.
How to set SMART objectives to focus and measure the success of customer relationship activities</td></tr>
</table>

	• How to evaluate the customer experience throughout the organisation's sales process and post-sale activities • The benefits to buyer organisation of preferred suppliers and the selection processes they use to source suppliers • The benefits of preferred supplier status for customers, e.g., consistent quality of product/service, reliability to deliver in full/on time, cost-effectiveness, excellent customer service etc. • The benefits of preferred supplier status for suppliers, e.g., increased sales and revenue, improved margins, stronger long-term relationships, enhanced reputation etc. • How to become a preferred supplier, e.g., meet/exceed the buyer's expectations in terms of product/service delivery and quality, offer competitive pricing and value for money, respond promptly to inquiries, be proactive in solving problems, build strong relationships with the buyer's team, show a commitment to continuous improvement in your products/services, and processes etc. • Customer Attractiveness Factors (CAF) - how to assess the relative attractiveness of different customer segments by considering factors like profitability, loyalty, growth potential, and risk • The benefits of customer service and the value this adds to an offer • When, why, how and who to include from your own organisation to provide the necessary technical and other support in the sales process
3.	• How to benchmark against industry standards and those of other industries • How contractual arrangements impact on sales • How to collate information from customers and sales teams • How segmentation and positioning can be used to make developing and winning new business more effective • The value of referrals, industry events and online interactions, e.g., blogs, direct newsletter, social media platforms etc. • How to identify negative changes in buying behaviour (e.g., order values, cancelled appointments, competitor activity or pressure of margins) and take corrective actions can be taken • How to identify positive changes in buyer behaviour (e.g., increase in order value, increased order frequency, requests for more visits, queries about specialised products, requests for swifter delivery etc.) and respond quickly to meet customer needs • The criteria used to assess customer accounts, e.g., sales volumes, profitability, product/service types ordered, efficiency of account management, payment terms etc. • How to align account management plans with organisational and departmental objectives

Assessor Guidance	
1.	Learners should analyse at least two internal and two external factors that influence customers. They should evaluate at least two quality measures that impact buying decisions in relation to their own organisation's products and services. They should draw on at least two customers' requirements for potential supplier capability and capacity in their review, highlighting the strengths and challenges that their assessments might bring to their organisation.
2.	Learners should analyse the way that their organisation plans and manages customer accounts, drawing conclusions about the processes that are effective and any that could be improved. They should give examples of at least three different customer requirements and evaluate their organisation's ability to meet their needs. Learners should explain what is meant by 'preferred supplier' status and explore at least three benefits for their organisation. Their evaluation of how their organisational adds value for customers should cover at least the types of technical support provided and at least two types of other resources.
3.	Learners should address the differences between developing existing accounts and winning new accounts in their review of their organisation's approaches, giving examples to support their points.

	They should summarise at least four benefits of customer account monitoring and assess at least three of their own customer accounts using at least three criteria. Learners should create a plan to develop at least three customer accounts, including at least one new potential customer.

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	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 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.

Unit Title	L4C3 Develop Value Propositions	
UAN	L/650/7915	
Level	4	
Credit Value	3	
Guided Learning Hours	15	
Learning Outcomes	Assessment Criteria	
	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.	Understand the factors involved in creating a value proposition	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	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 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.

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	Not linked to the apprenticeship standard.
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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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	Not linked to the apprenticeship standard.
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.

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Qualification Unit Specifications – Leadership

Unit Title	L5L1 Manage Team Performance	
UAN	F/651/5986	
Level	5	
Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	**Assessment Criteria**	
1. Understand leadership styles and practices	1.1	Analyse leadership style theories and practices
	1.2	Evaluate the differences between leadership and management
	1.3	Evaluate the relationship between leadership style choice and situational context
2. Understand flexible working practices	2.1	Evaluate the benefits of flexible working practices for employees
	2.2	Evaluate the benefits of flexible working practices for organisations
	2.3	Analyse the impact of remote working on the sales function
3. Understand how to build positive colleague relationships	3.1	Analyse approaches for building collaboration within the sales team
	3.2	Evaluate ways of building positive relationships with other organisational functions
	3.3	Explain how to demonstrate ethical behaviour when building team relationships
4. Be able to communicate the sales vision and objectives	4.1	Share the sales vision and objectives with the sales team
	4.2	Define the team's key tasks required to achieve their objectives
	4.3	Facilitate open team communication to support team members to identify how they can contribute to achieving team objectives
5. Be able to manage sales team members to achieve their objectives	5.1	Prioritise and allocate tasks to team members
	5.2	Agree individual objectives and incentives with all team members
	5.3	Support team members to be accountable for achieving their objectives
	5.4	Resolve individual and team challenges
	5.5	Monitor the progress and quality of tasks completed
	5.6	Deliver regular feedback to individuals and the team
	5.7	Provide recognition to the team when objectives are achieved

Additional Information	
Unit purpose and aims	To enable learners to understand how leadership styles and practices are applied in different contexts. They will understand flexible working practices, and how to build positive relationships with colleagues. Learners will communicate the sales vision and objectives, then manage their sales team members to achieve them.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K1 Presentation skills and methods. K4 Approaches to people management, for example recruitment, performance management, reward, and talent management and resource planning. K10 Methods used to identify, manage and prioritise stakeholder relationships. K11 The current and future needs of the sector and the impact on their organisation. K15 Communication techniques and approaches. K16 Ethics and values-based leadership theories and principles, for example employee wellbeing. K18 Leadership and management tools and techniques.

		K25 The strategic direction of the organisation and the impact on operational plans. S1 Communicate and present information to stakeholders using different types of media. S3 Manage and set goals and accountabilities for individuals and teams. S4 Analyse performance data for individuals and teams to identify areas for improvement. S6 Lead and influence the team and individuals to support an inclusive culture of equity, diversity, and the promotion of well-being. S7 Motivate team members and individuals through collaborative activities, for example one-to-one coaching and team meetings, to achieve organisational goals. S13 Analyse and prioritise organisation activities in response to the operating environment. S18 Deliver sustainable services and solutions which allow the organisation to respond to changes in social, economic and environmental factors. S21 Develop and implement operational plans that align with the strategic direction of the organisation. B2 Supports an inclusive culture, treating colleagues and stakeholders fairly and with respect. B3 Takes accountability and ownership of their own and the team's tasks and workload.
Location of the unit within the Ofqual subject/sector classification system		15.4 - Marketing and Sales
Indicative Content		
1.	• The range of leadership and management styles models and practices, e.g., action centred leadership (Adair), trait theory (Stogdill), behavioural theory (Lewin), contingency theory (Fiedler), transformational leadership (Burns, Bass), transactional leadership (Weber), servant Leadership (Greenleaf, Spears), authentic leadership (George), situational Leadership (Hersey and Blanchard) etc. • Kouzes and Posner five fundamental characteristics of leaders • The differences between leadership and management, e.g., focus, vision versus goals, people versus systems, innovation versus stability, long versus short-term etc. • How to adapt leadership styles to suit a range of situations, e.g., different organisational challenges, organisational culture, competitiveness, individual team personalities, risk situations, organisational stage, change context, recession etc.	
2.	• The different flexible working arrangements that are available to UK workers, e.g., remote working, flexitime, compressed workweeks, job sharing, part-time work, annualised hours, term-time working, shift swapping, remote work hubs etc. • The different communications technology used for different types of stakeholders, conversation and briefings • The benefits of flexible working practices, e.g., to promote work-life balance, increase employee satisfaction and retention, accommodate individual needs and preferences etc. • The flexible working arrangements that are supported by legislation in the UK, such as the right to request flexible working after 26 weeks of employment, and the employer's discretion to approve requests • The opportunities for innovation, efficiency, and flexibility that remote working arrangements can contribute, e.g., improved sales performance, increased customer satisfaction etc. • The impact of remote working on the sale function, e.g., need to adapt sales processes, enhanced flexibility of team, expanded reach, leveraging technology, challenges in relationship building, impact on sales culture, adoption of a range of leadership styles, training and development etc.	

3.	• The features of effective team and functional collaboration • The different approaches that can be for building collaboration within the sales team • How organisational culture affects collaborative working • How to understand the emotions, concerns, motivations and behaviours of team members • Different communication styles to align with differing individual needs • Stakeholder management models, e.g., salience model, power and interest grid, RACI, stakeholder circle, ADKAR etc. • The typical stakeholders and the level and type of communications required to build trust and partnership • How to interpret the concerns or motivations of those in the team and other functions in the organisation • The different roles within an effective team, e.g., Belbin's team roles • The importance of clear and honest communication with individuals and the team • Why it is important to adopt a leadership style that engenders trust and encourages two-way communication within team and organisation • How to use relevant actions and words to role model and maintain policies and practices that are ethical fair to all members of the team
4.	• How to share the sales vision and objectives with the sales team in a format and style that meets their needs • How to effectively provide team briefing on a regular formal and informal basis • The importance of creating visions of success and where this sits within the organisation's wider strategy • How to secure 'buy-in' and commitment from the team • The techniques that facilitate open discussion between team members • How to create a culture of openness, trust and honesty (versus fear culture) • How to use questions to encourage team members to participate in discussions about how they can use their unique skills and experience to contribute to achieving team objectives • How to break down team objectives into manageable tasks that can be allocated to different team members • The methods that can be used to communicate actions to keep maintain momentum and deliver shared success • How to facilitate two-way communication within the team • How to enable team members to ask questions, interpret the vision and see their role in achieving it
5.	• How to develop tasks related to team objectives and prioritise them using relevant techniques, e.g., urgent/important matrix • How to allocate tasks to team members in a way that meets their needs, skills, experience and interests • How to agree individual objectives and incentives with all team members • The key performance indicators related to team objectives • How to set measurable objectives (SMART) and performance indicators that are applicable to team members achieving tasks • How to develop personal understanding of the different needs/motivations of individuals • How to identify the team's position are in the forming, storming, norming and performing phase of team development (Tuckman) • How to support team members to be accountable for achieving their objectives • How to encourage people to take responsibility and accountability for completing tasks • The rewards and incentives available for the team • How to use of milestones to pick up issues early • The techniques that can be used to resolve individual and team challenges • Why it is important to monitor the progress of tasks completed regularly • How to monitor the quality of the work completed by the sales team • How to identify team members who are struggling and need additional help

	• The process for maintaining alignment with sales and organisational strategy, e.g., benchmarking, continual monitoring, adjusting maintain alignment, etc. • Why it is important to provide regular feedback to individuals and the team, and how to use different approaches • Ways to provide appropriate praise and recognition, both formal and informal • The best way to deliver recognition, e.g., private/public, formal/informal, written/verbal, through actions/reward, etc. • The potential effects of praise on other team members

Assessor Guidance	
1.	Learners should analyse at least four different leadership and management theories and their associated practices with specific examples given to demonstrate understanding of how these work in practice. When evaluating the differences between leadership and management, learners should draw on valid sources to consider if they support the idea that they differ, giving workplace examples to support their opinions. When providing evidence for AC1.3, learners should provide at least three different contexts that leaders may face then explore how different leadership styles might be applied, drawing conclusions and providing rationale for the choices that they would make.
2.	Learners should evaluate at least four types of flexible working practices and the benefits that each has for both individual employees and the organisation. Their analysis of the impact of remote working should include specific examples of how this approach can affect the sales function both positively and negatively. They should include at least four impacts that remote working may have.
3.	Learners should analyse at least three different approaches for building collaboration within the sales team and at least two approaches for building collaboration with other organisational functions. They should explain at least five ways to demonstrate ethical behaviour as a leader when building team relationships with examples of how these align with organisational policies and practices.
4.	Learners should provide evidence of sharing the organisational vision and team objectives with the sales team. They should provide evidence of breaking down the team's key tasks related to the achievement of the objectives set. Further evidence of facilitating open communication with, and between, individual team members should be provided (this could be emails, meeting minutes/recordings, 1:1 meeting notes, team feedback, line manager feedback etc.)
5.	Learners should provide evidence of prioritising tasks, including the rationale for why they have prioritised activities in the way that they did. They should allocate tasks to team members, providing examples of how they have agreed individual objectives and incentives with at least two team members. Learners should monitor the progress of task completion with their team and document what has been achieved on at least three occasions. They should provide an example of at least one challenge that they faced and the actions that they took to resolve it. Evidence of supporting the team to achieve their objectives, including records of the feedback provided should be given. This should clearly show how the learner has given recognition to at least one individual for the achievement of their objectives.

Unit Title	L5L2 Manage Recruitment	
UAN	H/651/5987	
Level	5	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
	1.1	Analyse human resource planning in organisations
	1.2	Assess the impact of legal requirements on recruitment processes

1.	Understand organisational human resource planning processes	1.3	Evaluate how organisational policies impact recruitment
2.	Understand the processes and people involved in sales professional recruitment	2.1	Evaluate organisational recruitment processes
		2.2	Analyse the roles and responsibilities of the people involved in sales professional recruitment
3.	Be able to plan recruitment for a role which meets legal and organisational requirements	3.1	Produce a job description and role specification for an agreed sales role
		3.2	Define the terms and conditions of the role
		3.3	Design the application and selection process to meet organisational and legal requirements
4.	Be able to implement the recruitment process for a sales role	4.1	Collaborate with the human resources to initiate the recruitment process
		4.2	Use multiple channels to source candidates
		4.3	Assess applications and shortlist candidates for interview
		4.4	Conduct structured interviews and assessments with candidates
		4.5	Make a job offer to a candidate

Additional Information	
Unit purpose and aims	To enable learners to understand organisational human resource planning processes and the range of people involved in sales professional recruitment. Learners will plan recruitment to meet legal and organisational requirements and implement the recruitment process for a sales role.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K3 Legislation and organisational policies relating to equity, diversity and inclusion in the workplace and their impact on the organisation and stakeholders. K4 Approaches to people management, for example recruitment, performance management, reward, and talent management and resource planning. K5 IT and software tools used to support the current and future needs of the organisation, including advances in technology. K6 Methods for researching, analysing, interpreting and evaluating data to inform judgements and enable decision making. K15 Communication techniques and approaches. S1 Communicate and present information to stakeholders using different types of media. S13 Analyse and prioritise organisation activities in response to the operating environment. S17 Manage relationships across multiple and diverse stakeholders. B2 Supports an inclusive culture, treating colleagues and stakeholders fairly and with respect. B6 Works collaboratively with others across the organisation and stakeholders.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The role of human resource planning in organisations to ensure that they have the right people, with the right skills, in the right places, at the right times • The human resource planning processes and techniques that are used in organisations • The role of redeployment of human resources to achieve organisational objectives

	• The use of outsourcing, subcontracting, and outworkers in organisations • Techniques that are used for organisational succession planning • The legal and organisational requirements of recruitment processes • The ways that organisational policies and procedures impact recruitment for sales roles in both positive and negative ways
2.	• The systematic steps involved in attracting, selecting, and hiring qualified candidates to fill open positions within organisations • The reasons for recruitment for a sales role, e.g., organisational expansion, organisational growth, employee retirement/resignation/maternity and paternity leave, change of working hours etc. • How to develop job descriptions and specifications following organisational formats and requirements • How to work with the human resources team to formulate a recruitment plan with strategies for sourcing and attracting suitable candidates • Organisational processes that are used for screening and short-listing candidates • The range of assessment and interviewing methods that can be used during recruitment, e.g., online tests, assessment centres, aptitude and personality psychometrics • How candidates are selected, and the people involved in making the recruitment decision
3.	• Techniques for job analysis • Why it is important to describe what success looks like for the role and to include this in the hiring process • Organisational recruitment policies and procedures for producing a job description and role/person specification • Why it is important to use a clear and concise writing style, highlighting the role's potential and the benefits of working for your organisation • How to makes decisions related to the terms and conditions of a role • The UK's legal aspects of recruitment and selection and how to adhere to them • The consequences of non-compliance with legal requirements for recruitment • The terms and conditions for a job role, e.g., title, reporting line(s), start date, probationary period (if applicable), base salary, overtime pay, bonus, commission, benefits, working hours, working location, responsibilities, tasks, performance expectations, notice period, termination clause, confidentiality, intellectual property rights, organisational policies etc. • The relevant methods of advertising vacancies, internally and externally • The selection techniques that can be used, e.g., interviewing, testing, assessment centres, references etc. • How to create a selection process that meets equality, diversity and inclusion requirements • The reasonable adjustments that can be made in the recruitment process • Why it is important to maintain comprehensive records to support and justify decisions
4.	• The methods that are used to find and attract candidates to the open position, e.g., job boards, social media, employee referrals, recruitment agencies, networks, professional organisations etc. • How to manage internal and external job applications • How to conduct an initial screening process to identify candidates who meet the minimum requirements and possess the desired qualities, e.g., reviewing resumes, cover letters, conducting short phone or video interviews. • The different interview types that are used for recruitment, e.g. formal/informal, • How to ensure that the structure and format of interviews is implemented in the same way for all candidates • How to create a welcoming climate when conducting an interview to encourage candidates to perform at their best • How to participate in panel interviewing • The questioning and listening techniques that can be used during interviews • The impact of non-verbal communication in interviews • How to follow the legal and ethical considerations during interviews

	• Ways to analyse and interpret the information gained via interviews and assessments, e.g., facts, evidence, opinion, meaning etc. • How to record selection information and interview outcomes using relevant organisational systems • The importance of feeding back during and after interviews to interviewee and authorised people, and the methods/channels that are used • How to inform applicants of the outcome of their application at different stages • The relevant checks that are required legally, and by the organisation, following job offer, e.g., CRB, references, qualification checks etc.

Assessor Guidance	
1.	Learners should analyse at least three aspects of human resource planning, drawing conclusions about how this benefits an organisation. They should assess all UK legal requirements for recruitment and evaluate at least two organisational policies to reach conclusions about how they impact the recruitment process.
2.	Learners should evaluate the whole organisational recruitment process, from identification and justification of need through to offer. They should evaluate the roles that the recruiting manager and the human resources team undertake in the process, clearly identifying the benefits and challenges.
3.	Learners should follow their organisation's requirements and processes for creating a job description and role/person specification for a sales professional. They should provide evidence of defining the terms and conditions for the role and designing the application/selection process (this is likely to be done in partnership with the HR team).
4.	Learners should evidence how they have collaborated with HR to start the recruitment process and used at least three channels to source candidates for their open role. They should provide details of the criteria that they used to assess applications, and evidence of assessing at least two applicants (names should be removed). They should provide an example of at least one applicant shortlisted for interview and another applicant who was rejected, giving rationale for the decisions that were made. Learners should evidence conducting interviews and other assessment methods for at least two candidates. They must show how they made the offer to the successful candidate, both informally and formally.

Unit Title	L5L3 Motivate Sales Professionals	
UAN	J/651/5988	
Level	5	
Credit Value	5	
Guided Learning Hours	25	
Learning Outcomes	**Assessment Criteria**	
1. Understand how motivation theories relate to sales leadership	1.1	Evaluate motivation theories and the associated leadership practices
	1.2	Analyse the relationship between motivation, compensation and sales performance
2. Understand a range of compensation approaches for sales professionals	2.1	Evaluate financial incentives that motivate sales professionals
	2.2	Evaluate non-financial incentives that motivate sales professionals
	2.3	Compare compensation approaches to determine the best organisational fit
3. Be able to establish motivating compensation systems	3.1	Evaluate organisational barriers to employee motivation
	3.2	Identify individual motivators for team members
	3.3	Establish monitoring processes to track individual and team progress
	3.4	Design compensation systems that drive individual and organisational success

4.	Be able to motivate sales professionals to achieve their goals	4.1	Agree individual compensation sales plans with team members
		4.2	Provide recognition of agreed individual achievements
		4.3	Review the impact of incentives to improve sales performance
		4.4	Create a plan to maintain and improve sales team performance

Additional Information	
Unit purpose and aims	To enable learners to understand how motivation theories relate to sales leadership and team performance. They will understand a range of compensation approaches for sales professionals and be able to establish compensation systems that motivate sales professionals to achieve their goals.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** S7 Motivate team members and individuals through collaborative activities, for example one-to-one coaching and team meetings, to achieve organisational goals. B3 Takes accountability and ownership of their own and the team's tasks and workload.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The range of motivational theories available, e.g., Maslow's Hierarchy of Needs, Herzberg's 2-Factor theory, McClelland's Needs theory, Deci and Ryan's Self Determination theory, Hackman and Oldham Job Characteristics Model, Vroom's Expectancy theory etc. • How to apply motivational theories through leadership practices • How to evaluate team motivation and apply relevant techniques to maintain and improve performance in organisations • The team building techniques that support team performance and growth • The difference between intrinsic and extrinsic motivators • Different types of motivators, e.g., agreed goals and individual/team objectives, self-fulfilment, achievement, work environment, organisation values and culture, financial rewards, compensation packages, competitive sales success etc. • How to benchmark against other sales teams to ensure that incentives are fit for purpose to maintain and improve sales performance
2.	• The different types of financial incentives, e.g., bonus, management objectives and commission, types of commission structures. • The different types of non-financial rewards, e.g., holiday allowance, experience, learning and development opportunities, team building events, flexible working, recognition (public praise, award, performance review feedback) etc. • How to assess the incentives available in an organisation, e.g., financial salary increases, bonus, commission structures etc. • How to assess non-financial approaches in an organisation, e.g., promotion, training, projects, additional responsibilities, larger customer accounts and internal recognition etc.
3.	• The barriers to motivation and performance, e.g., organisation systems and procedures, how achievements are monitored and measured, management styles, lack of recognition and/or reward, conflicts in values and working styles etc. • The ways to overcome barriers to motivation and performance for individuals and teams • How to identify individual motivators for different team members • How to use transparent benchmarks to measure sales team member success, e.g., pipeline fulfilment, individual KPIs/targets, team targets, rewards etc. • The non-financial methods used for measurement, e.g., Net Promoter Score • The informal/formal methods that can be used for monitoring, e.g., face to face catch ups, performance reviews, 360 evaluations etc.

	• The external effects of team monitoring and adapting leadership approaches, e.g., territory, business environment, customer perception etc.
4.	• The components of individual and team sales compensation plans • How to create a plan to maintain and improve sales team motivation and performance • How to secure sign off for new compensation plans • How to agree individual sales plans with team members to ensure that they meet their individual preferences • How to allocate appropriate incentives to individuals based on their experience, role and goals • The role of Personal Development Plans (PDPs), KPI's and performance measures to encourage motivation and achievement • The approaches that can be used to carry out appraisals/performance assessments to maintain and improve personal performance levels • The importance of documenting reviews with team members • How to provide recognition of individual achievements in a manner that suits an individual's personality and preferences • The approaches that can be adopted to review the impact of incentives to improve sales performance • The different methods of recognition, e.g., public praise, 1:1 praise, appropriate organisational media, award of bonus or commission, providing fulfilling, opportunities to balance work life against other life goals, contributing to social responsibility projects etc. • The effect of incentives for improving performance and how this effects costs and profitability of the organisation • How to use technology to assist in moulding incentives to change behaviours, internal communications to aid motivation, etc.

Assessor Guidance	
1.	Learners should evaluate at least three different motivational theories and associated leadership practices, highlighting the benefits and disadvantages of each. They should analyse the links between motivation, compensation and sales performance, and provide a range of workplace examples to support their points.
2.	Learners should evaluate at least two types of financial incentives and two non-financial incentives that can be used to motivate a sales team. They should outline at least two compensation packages and compare them to determine which suits their team and organisational best. Rationale for their choice should be provided.
3.	Learners should evaluate at least four organisational barriers to employee motivation and draw conclusions about how these could be overcome for their own team of individuals. They should identify at least two individual motivators for at least two team members using relevant tools/techniques, with evidence of how they have interacted with team members to understand their personal motivations. Their compensation system design should cover at least two team members and be clearly aligned to their individual motivators and organisational success.
4.	Learners should provide evidence of how they have interacted with team members to agree sales compensation plans and incentives with them, and explored how they can support their performance. They should provide evidence of how they have recognised agreed individual achievements in a manner that reflects the individual sales professional's preferences and personality. Learners should evidence how they monitored and reviewed the impact of incentives to create an action plan with at least three actions to maintain and improve sales team motivation and performance.

Unit Title	L5L4 Coach and Mentor Sales Professionals	
UAN	R/651/5990	
Level	5	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand the purpose of sales coaching and mentoring	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	Evaluate how coaching and mentoring link to organisational sales objectives
2. Understand the processes that support sales coaching and mentoring	2.1	Summarise the stages involved in coaching and mentoring
	2.2	Analyse models and techniques that support coaching and mentoring
	2.3	Evaluate the knowledge, skills and personal characteristics required by coaches and mentors
	2.4	Analyse how to overcome the potential barriers to coaching and mentoring
3. Be able to plan coaching and mentoring with sales professionals	3.1	Agree coaching or mentoring plans with individuals
	3.2	Prepare for delivering sales coaching and mentoring sessions
4. Be able to coach and/or mentor sales professionals to support their CPD	4.1	Deliver sales coaching and/or mentoring sessions
	4.2	Maintain coaching and/or mentoring records that meet organisational and data protection requirements
	4.3	Critically evaluate own coaching and/or mentoring skills

Additional Information	
Unit purpose and aims	To enable learners to understand the purpose of sales coaching and mentoring and the processes that support these practices in the sales function. Learners will plan and implement coaching or mentoring with sales professionals.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 5 Operations Manager Apprenticeship</u>** K24 Coaching and mentoring techniques. S7 Motivate team members and individuals through collaborative activities, for example one-to-one coaching and team meetings, to achieve organisational goals. S20 Coach and mentor individuals within their team. B4 Seeks learning opportunities and continuous professional development for self and the wider team.
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., how conversations are conducted, 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 and professional 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.

	• Own organisations' expectations of the impact of coaching and mentoring • How developing individuals using coaching and mentoring supports the achievement of sales objectives
2.	• The coaching and mentoring cycles, e.g., set goals, plan activities, monitor progress, review outcomes • Different models that support coaching and mentoring, e.g., GROW (Whitmore, 1992), CLEAR (Hawkins, 2012), OSKAR (Jackson and McKergow, 2000), Five Stage • Mentoring Structures (Clutterbuck, 2004) etc. • The range of coaching and mentoring techniques that can be used • 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 personal characteristics that coaches and mentors require, e.g., empathetic, curious, inspirational, positive, persistent, open, innovative etc. • The individual barriers to coaching, e.g., trust, fear of failure, previous poor experience, resistant to change, low confidence, lack of motivation, limited time and resources etc. • The organisational barriers to coaching, e.g., cultural clash, lack of top-down support, limited investment, role conflicts, lack of competent coaches/mentors, limited understanding of the impact and benefits of coaching etc. • How barriers can be overcome
3.	• 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, e.g., coachee/mentee line manager, administrative staff, IT systems support, HR/L&D teams etc.
4.	• How to apply different coaching and mentoring models and techniques to support individuals • The importance of keeping coaching and mentoring records at all stages of the process, e.g., contracts, goals agreed, plans, notes from sessions, progress reviews, etc. • How coaching and mentoring supports sales professionals Continuing Professional Development (CPD) • When and how to evaluate own coaching and mentoring skills, e.g., after each session, at the end of the agreed contract, verbally, formally using surveys etc • Reflective practices that support effective evaluation of own coaching and mentoring performance

Assessor Guidance	
1.	Learners should analyse at least six differences between coaching and mentoring, giving workplace examples to support their points. Their evaluation should evaluate at least three benefits of coaching for individuals and three benefits of coaching for organisations. It should also include three benefits of mentoring for individuals and three benefits of mentoring for organisations. Learners should use their organisation's sales objectives to structure their response for 1.3 to explicitly address how both coaching and mentoring can contribute to their achievement.
2.	Learners should summarise the stages involved in coaching and mentoring giving examples of how they work in practice and the range of people involved. They should analyse at least two coaching models and two mentoring models and their associated techniques.

	For 2.3 learners should address knowledge, skills and personal characteristics separately, and should evaluate at least five aspects for each, drawing attention to how these may differ between coaches and mentors. At least ten barriers to coaching and mentoring should be analysed with suggestions made about how each barrier could be overcome.
3.	Learners should agree coaching or mentoring plans with at least two sales professionals, at any level. They can choose to coach two people, mentor two people, or evidence one coaching and one mentoring relationship. The plans should cover at least six sessions with each person (twelve in total). Sessions should be at least 45 minutes duration. They should provide evidence of preparing for the sessions such as email correspondence and gathering suitable background information/resources to support the coachee/mentee.
4.	Learners should deliver the twelve coaching/mentoring sessions that they have planned in LO3. They should keep records for each session that clearly meet the data protection and other requirements of their organisation. When submitting evidence of their performance they can remove the relevant details of their coachee/mentee. To evaluate their coaching and/or mentoring skills, learners should identify at least ten best practices and measure themselves against each practice. Specific examples should be used to justify their conclusions about their strengths and development areas. They should gather and include feedback from their coachees/mentees as part of their self-evaluation.

Unit Title	L5L5 Contributing to Organisational Innovation	
UAN	T/651/5991	
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	<u>**Level 5 Operations Manager Apprenticeship**</u> K8 How to identify and manage organisational improvement opportunities. K11 The current and future needs of the sector and the impact on their organisation. S2 Identify problems and provide solutions. S12 Manage continuous improvement and change for their team and organisation. S15 Identify and respond to external factors that may influence the future landscape and evaluate their impact on the organisation. B5 Works flexibly and adapts to circumstances.

Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
3.	• 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.
4.	• 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.
5.	• 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	
3.	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
4.	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.
5.	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.

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	**Level 5 Operations Manager Apprenticeship** K8 How to identify and manage organisational improvement opportunities. K11 The current and future needs of the sector and the impact on their organisation. S2 Identify problems and provide solutions.

	S12 Manage continuous improvement and change for their team and organisation. S15 Identify and respond to external factors that may influence the future landscape and evaluate their impact on the organisation. B5 Works flexibly and adapts to circumstances.
Location of the unit within the subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
6.	• 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.
7.	• 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.
8.	• 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	
6.	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
7.	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.
8.	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.

Unit Title	L5L6 Matrix Management
UAN	K/651/5989
Level	5
Credit Value	5
Guided Learning Hours	25

Learning Outcomes	Assessment Criteria	
1. Understand the principles and practices of matrix management	1.1	Explain the concept of matrix management and its application in organisations
	1.2	Evaluate the need for matrix management in a business environment and consider its advantages and disadvantages
	1.3	Identify the key roles and responsibilities within a matrix structure
	1.4	Analyse the impact of matrix management on organisational culture and employee performance
2. Be able to develop leadership, communication and collaboration strategies in a matrix environment	2.1	Assess the importance of leadership and communication in a matrix-managed sales team
	2.2	Develop strategies to enhance cross-functional communication and collaboration
	2.3	Propose methods for resolving conflicts and managing competing priorities
	2.4	Evaluate the effectiveness of different communication channels and tools in a matrix environment
3. Be able to implement performance management and motivational techniques in a matrix sales team	3.1	Design a performance management framework tailored to a matrix sales team
	3.2	Implement motivational techniques in a matrix environment
	3.3	Influence virtual team behaviours to achieve commercial outcomes

Additional Information	
Unit purpose and aims	To enable learners to understand the principles and practices of matrix management. Learners will develop leadership, communication and collaboration strategies that are suitable for matrix management and implement performance management and motivational techniques in a matrix sales team.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K15 Communication techniques and approaches. K18 Leadership and management tools and techniques. S1 Communicate and present information to stakeholders using different types of media. S4 Analyse performance data for individuals and teams to identify areas for improvement. S5 Manage and influence project activity to deliver within budget and resource requirements. S7 Motivate team members and individuals through collaborative activities, for example one-to-one coaching and team meetings, to achieve organisational goals. S16 Influence and negotiate with stakeholders to shape and agree goals and outcomes. S17 Manage relationships across multiple and diverse stakeholders. B2 Supports an inclusive culture, treating colleagues and stakeholders fairly and with respect. B6 Works collaboratively with others across the organisation and stakeholders.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• Definition and evolution of matrix management • The differences between leadership and management

	• Differences between traditional and matrix organisational structures, e.g., responsibility without authority • Examples of matrix management in a range of sectors and the relationship with the sales function • The benefits of matrix management approaches, e.g., improved flexibility, resource optimisation, enhanced organisational innovation etc. • The challenges of matrix management, e.g., potential conflicts, complexity in reporting lines, decision-making delays etc. • The key roles within a matrix structure that support the achievement of results, e.g., matrix managers, functional managers, project managers, team members etc. • The responsibilities within matrix management, e.g., balancing dual reporting lines, managing cross-functional teams, aligning objectives etc. • The influence of matrix management on organisational culture • The effects of matrix management on employee motivation, engagement, job satisfaction etc. • The strategies used for fostering a positive working culture in a matrix environment
2.	• The importance of communication in achieving coordination and coherence in matrix-managed teams • The range of communication barriers that arise, and strategies to overcome them • Techniques for promoting open communication and collaboration across all team members • The tools and technologies that support effective communication, e.g., collaborative software, virtual meeting platforms etc. • How to build trust and transparency within and between teams • The common sources of conflict in a matrix environment • Conflict resolution techniques that can be used, e.g., negotiation, mediation, problem-solving tools etc. • The strategies that can be used to prioritise tasks and manage workloads across different functions and organisations • How to evaluate different communication channels, e.g., face-to-face meetings, emails, instant messaging, etc. • Best practices for selecting and using appropriate communication tools for matrix working • The role of digital communication tools in enhancing team collaboration
3.	• The principles of performance management • Key performance indicators (KPIs) and metrics specific to sales teams • The importance of setting common goals, objectives and expectations across all participating parties • The components of an effective performance management system, e.g., goal setting, monitoring, feedback, evaluation etc. • How to adapt performance management processes to fit a matrix structure • The integration of performance management with organisational goals and sales targets • Different theories of motivation relevant to a matrix environment, e.g., Maslow's Hierarchy of Needs, Herzberg's Two-Factor Theory etc. • The differences between intrinsic and extrinsic motivation • The techniques for motivating matrix-managed sales teams, e.g., recognition, rewards, professional development, career progression etc. • The relationship between performance management and sales performance • How to measure the effectiveness of motivational techniques • How to continuously improve through feedback and performance reviews

Assessor Guidance	
1.	Learners should explain matrix management, including how matrix management is applied in various types of organisations with a focus on sales.

	They should identify at least three advantages and three disadvantages of matrix management in sales, critically evaluating each. They should explore how the benefits can enhance sales performance and how the disadvantages might pose challenges. Learners should outline the main roles in a matrix structure, detail the responsibilities associated with each role in a sales context, and discuss how these roles interact and coordinate with each other, giving relevant examples. Learners should analyse how matrix management affects organisational culture, including the impact on employee performance, providing examples of both positive and negative impacts.
2.	Learners should assess the critical role of communication in ensuring effective operation of a matrix-managed sales team, using examples to illustrate their points. Learners should propose at least three strategies to improve communication and collaboration across different functions in a matrix environment. The strategies should be practical and based on best practices or successful examples. Learners should identify common sources of conflict in matrix-managed sales teams and propose at least three methods for resolving these conflicts. They should also discuss techniques for managing competing priorities, ensuring that all team members are aligned and working towards common goals, giving examples to support their points. Learners should evaluate at least four communication channels and tools. They should discuss the strengths and weaknesses of each channel/tool in the context of a matrix-managed sales team, providing examples of how each can be used effectively.
3.	Learners should design a comprehensive performance management system for a matrix-managed sales team. They should justify their design choices with reference to best practices/theories. Learners should implement at least two motivational techniques, providing a range of workplace examples to illustrate they impact they have had on team members. Learners should analyse how performance management systems and motivational techniques influence sales outcomes. They should provide examples to illustrate the positive and negative impacts, suggesting strategies for continuous improvement.

Unit Title	L5L7 Support Customer Innovation	
UAN	Y/651/5992	
Level	5	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand customers pain points, goals, and aspirations	1.1	Analyse pain points and opportunities faced by customers in meeting their commercial objectives
	1.2	Assess customers' short-term and long-term goals
	1.3	Evaluate customers' aspirations for growth and development
2. Understand how to encourage customers to innovate to address their unique challenges and opportunities	2.1	Analyse the importance of innovation in addressing customer challenges and opportunities
	2.2	Propose potential innovative solutions tailored to customers' needs
	2.3	Develop strategies to foster a culture of innovation in customer organisations
3. Be able to partner with customers to support their product/service innovation to achieve long-term success	3.1	Create innovative solutions with a customer using collaborative approaches
	3.2	Implement a pilot programme to test an innovative solution in a low-risk environment
	3.3	Evaluate the impact of innovative solutions on a customers' business performance
	3.4	Support a customer to scale successful innovations across their organisation

Additional Information	
Unit purpose and aims	To enable learners to understand customers pain points, goals, and aspirations. They will understand how to encourage customers to innovate to address their unique challenges and opportunities. Learners will be able to partner with customers to support their product/service innovation to achieve long-term success.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K8 How to identify and manage organisational improvement opportunities. K9 Project management tools and techniques. K10 Methods used to identify, manage and prioritise stakeholder relationships. K11 The current and future needs of the sector and the impact on their organisation. K12 Problem solving and decision-making techniques. K15 Communication techniques and approaches. K17 Change management concepts and methods for implementing change within the organisation. S2 Identify problems and provide solutions. S5 Manage and influence project activity to deliver within budget and resource requirements. S15 Identify and respond to external factors that may influence the future landscape and evaluate their impact on the organisation. S16 Influence and negotiate with stakeholders to shape and agree goals and outcomes. S18 Deliver sustainable services and solutions which allow the organisation to respond to changes in social, economic and environmental factors. B4 Seeks learning opportunities and continuous professional development for self and the wider team. B6 Works collaboratively with others across the organisation and stakeholders.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The approaches that engage customers for in-depth discussions to understand their vision for the future and their desired innovations • Why it is important to present new ideas, fresh insights, and market knowledge to customers, and using this conversation to create reason(s) for change • The types of primary pain points faced by customers, e.g., financial, productivity, process, support, etc. • Methods that are used for identifying pain points, e.g., surveys, interviews, customer feedback, data analysis etc. • How to gather and analyse data from customer feedback, surveys, and other relevant sources to identify key challenges • How to conduct interviews and utilise strategic assessment tools to map out customers' immediate and future objectives • The techniques used to conduct root cause analysis, e.g., 5 Whys, Fishbone Diagram (Ishikawa), SWOT Analysis etc. • Customer Journey Mapping to identify the touchpoints where pain points occur • The difference between short-term (operational) and long-term (strategic) customer goals • How to use strategic planning tools to understand and assess customer goals, e.g., SMART objectives, Balanced Scorecard, PESTLE Analysis etc.

	• How to explore the perspectives and expectations of different stakeholders using stakeholder analysis • The role of vision and mission statements in defining customer aspirations • Models of organisational growth, e.g., Ansoff Matrix, Greiner's Growth Model, Porter's Five Forces etc. • The role of innovation for achieving growth, e.g., frameworks like the Innovation Value Chain
2.	• The importance of innovation, e.g., competitive advantage, market positioning, reputation, customer satisfaction, customer loyalty etc. • Innovation Theories, e.g., Disruptive Innovation (Christensen), Blue Ocean Strategy (Kim & Mauborgne), Open Innovation (Chesbrough) etc. • The business case: how to develop detailed rationale for why innovation is critical to overcoming specific customer challenges and seizing market opportunities • How organisations successfully use innovation to solve problems • The range of creative problem-solving techniques that can be used with customers, e.g., brainstorming, SCAMPER (substitute, combine, adapt, magnify, put to another use, eliminate, reverse/rearrange), Design Thinking etc. • Customer-Centric approaches, e.g., Jobs to Be Done (JTBD) Theory, Empathy Mapping, Value Proposition Canvas etc. • How to leverage emerging technologies to create innovative solutions, e.g., AI, IoT, Blockchain etc. • The characteristics of an innovation culture • How to present innovative solutions that are customised to the unique requirements of different customers • Change management models that support organisational innovation, e.g., Kotter's 8-Step Change Model, ADKAR etc. • The role of transformational leadership in encouraging innovation, e.g., leading by example • The best practices for encouraging a mindset of continuous improvement and creative problem-solving among customer teams
3.	• The co-creation Methods that can be used when collaborating with customers, e.g., workshops, joint development sessions, customer advisory boards etc. • How to facilitate workshops and brainstorming sessions that bring together customer and sales teams to generate and refine new ideas • Digital collaborative tools and how they are used, e.g., Slack, Microsoft Teams, Miro etc. • The different partnership models that are used for innovation, e.g., strategic alliances, joint ventures, innovation ecosystems etc. • How to define pilot programme objectives, scope, and success criteria • How to design pilot initiatives that allow customers to experiment with new products or services on a small scale before full implementation • The testing and validation processes, e.g., prototyping, Minimum Viable Product (MVP), user testing etc. • How to identify, assess, and mitigate risks in pilot programmes • How to monitor and evaluate the impact of innovative solutions on customers' business performance using performance metrics, e.g., key performance indicators (KPIs), Return on Investment (ROI), Balanced Scorecard etc. • Ways to establish metrics and feedback mechanisms to assess the effectiveness of the implemented innovations and make necessary adjustments for continuous improvement • The feedback mechanisms that can be used, e.g., customer feedback loops, Net Promoter Score (NPS), continuous improvement (Kaizen) etc. • How to use data analytics to track performance and derive insights • Innovation scaling strategies and frameworks for scaling innovation, e.g., McKinsey's Three Horizons of Growth • How to ensure organisational readiness for scaling, e.g., stakeholder engagement

	• The approaches used to build capabilities for continuous innovation and embed innovation into the organisational DNA • How to provide guidance and resources to help customers roll out proven innovations more broadly, ensuring alignment with their strategic objectives and market demands

Assessor Guidance	
1.	Learners should analyse at least three primary pain points that two customers face using relevant tools. They should provide workplace examples to illustrate how these pain points impact customer satisfaction and business performance. Learners should assess customers' short-term and long-term goals using strategic planning tools, including examples of how understanding these goals can influence sales strategies. They should evaluate customers' aspirations for growth and development by examining vision and mission statements, and growth models. They should provide at least three examples of how these aspirations drive innovation and competitive advantage.
2.	Learners should analyse the importance of innovation using a relevant theory, giving at least two examples of how innovation has addressed specific customer challenges and helped them to seize opportunities. They should propose potential innovative solutions for at least two customers. These should be tailored to each customer's needs. Learners should develop at least two strategies to foster a culture of innovation within customers' organisations, including examples of leadership practices that promote an innovative culture.
3.	For this learning outcome learners should focus on one of the customers that they proposed solutions for in LO2. They should demonstrate using at least two collaborative techniques with the customer to co-create innovative solutions. Learners should implement one pilot programme for a customer to test an innovative solution. The design, objectives, and success criteria should be specified. Learners should monitor and evaluate the impact of the innovative solutions on the customer's business performance using relevant measures, providing examples of how data analysis and customer feedback have informed continuous improvement. They should provide evidence of supporting one customer to scale a successful innovation. using a relevant framework, giving at least two examples of effective scaling strategies and the role of change management in sustaining innovation.

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.

Unit Title	L6L4 Lead Continuous Improvement	
UAN	T/651/6007	
Level	6	
Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	**Assessment Criteria**	
1. Understand the factors that contribute to organisation continuous improvement	1.1	Critically evaluate the principles and concepts of continuous improvement
	1.2	Analyse the importance of a culture of continuous improvement within an organisation
	1.3	Evaluate the roles and responsibilities of sales leaders in relation to continuous improvement
	1.4	Assess the impact of external and internal factors on organisational continuous improvement processes
2. Be able to analyse information linked to continuous improvement	2.1	Analyse data to identify trends, patterns, and areas for improvement in the sales function
	2.2	Use analytical tools and techniques to evaluate the effectiveness of current sales processes
	2.3	Determine the root causes of issues and areas for enhancement
	2.4	Report on the analysis findings and make recommendations for continuous improvement
3. Be able to implement continuous improvement in the sales function using analysis findings	3.1	Develop a continuous improvement plan based on analysis findings and secure buy-in from stakeholders
	3.2	Allocate resources to support continuous improvement activities in the sales function
	3.3	Implement the continuous improvement plan, monitoring progress and adjusting when necessary
	3.4	Evaluate the continuous improvement process outcomes and share lessons learned

Additional Information	
Unit purpose and aims	To enable learners to understand the factors that contribute to organisation continuous improvement. Learners will analyse information, identify opportunities and implement continuous improvement in the sales function.

Details of the relationship between the unit and apprenticeship standards		**Level 6 Business to Business Sales Professional Apprenticeship** K3 Solution Development K6 Post Sales Delivery K7 Applied Insights S6 Leveraging Digital Business B2 Management of Self
Location of the unit within the Ofqual subject/sector classification system		15.4 - Marketing and Sales
Indicative Content		
1.		• The principles and concepts of continuous improvement, including the definition and purpose • Kaizen philosophy and its application in organisations • Lean principles and Six Sigma methodologies • Total Quality Management (TQM) and its relevance to continuous improvement • Deming's PDCA cycle (plan-do-check-act) • The importance of a culture of continuous improvement to organisations • How to build a culture of continuous improvement, e.g., leadership commitment, employee involvement, open communication etc. • The role of organisational culture in supporting continuous improvement initiatives • The benefits of a continuous improvement culture, e.g., enhanced productivity, employee engagement, customer satisfaction etc. • The barriers to creating a culture of continuous improvement and strategies to overcome them • The benefits of continuous improvement, e.g., increased efficiency, cost savings, improved quality, innovation etc. • The challenges of continuous improvement, e.g., resistance to change, resource allocation, maintaining momentum etc. • Case studies of successful continuous improvement initiatives in sales functions in different organisations • The roles and responsibilities of sales leaders in relation to continuous improvement • How different leadership styles can impact on continuous improvement • The role of sales leaders in promoting and modelling continuous improvement behaviours • Ways to engage and empower sales teams in continuous improvement activities • The coaching and mentoring techniques for fostering a continuous improvement mindset • The impact of external factors on continuous improvement, e.g., market trends, customer feedback, competitive landscape, regulatory changes etc. • The impact of internal factors on continuous improvement, e.g., organisational structure, internal processes, technology, workforce skills etc. • SWOT analysis (strengths, weaknesses, opportunities, threats) in the context of continuous improvement
2.		• How to identify and collect relevant data from different sources to support continuous improvement, e.g., sales performance metrics, customer feedback, market research, internal audits. • How to assess the relevance and veracity of data • The techniques used for data collection, e.g., surveys, focus groups, Customer Relationship Management (CRM) systems, workplace observations etc. • How to analyse data to identify trends and patterns over different periods of time • How to conduct quantitative analysis, e.g., statistical methods, data visualisation techniques etc. • How to conduct qualitative analysis, e.g., thematic analysis, content analysis etc. • The approaches that are used to determine key performance indicators (KPIs) and benchmarks for organisational continuous improvement • The range of tools and techniques that support analysis

	• How to use of analytical tools, e.g., pareto analysis, root cause analysis (5 whys, fishbone diagram), control charts etc. • The software and technologies used for data analysis, e.g., Excel, business intelligence tools (e.g., tableau, power bi) etc. • How to interpret finding from data analysis to meet organisational requirements • How to synthesise data to draw meaningful conclusions • How to identify root causes and opportunities for improvement • The techniques for scenario analysis and impact assessment • The format for structuring reports, e.g., executive summary, methodology, findings, recommendations etc. • The benefits of presenting findings visually, e.g., charts, graphs, infographics etc. • The approaches that can be used to communicate findings effectively to stakeholders and different audiences
3.	• The stages involved in setting a continuous improvement plan for an organisation • How to set SMART (specific, measurable, achievable, relevant, time-bound) objectives • The importance of prioritising improvement initiatives based on impact and feasibility • How to propose and agree action planning and timeline development with stakeholders • The strategies for effective stakeholder communication, e.g., clear, consistent, and transparent messaging • The techniques for gaining stakeholder buy-in and support • Approaches for managing organisational change and addressing resistance from individuals and teams • How to identify necessary resources, e.g., human, financial, technological etc. • Budgeting and cost-benefit analysis • Resource management and optimisation • Ways to implement a continuous improvement plan within the sales function/organisation using project management principles and methodologies, e.g., Agile, Prince2 etc. • How to monitor and control progress against the agreed plan, e.g., milestones, checkpoints, feedback loops etc. • Why it is important to adapt and respond to challenges during implementation, and how to agree and implement adjustments and changes • The technique and tools that can support evaluating outcomes of continuous improvement • How to measure success against objectives and KPIs • Ways to conduct post-implementation reviews and audits • How to gather feedback from stakeholders and sales teams. • How to document and share lessons learned by creating detailed records of processes and outcomes • How to identify best practices and areas for further improvement • The communication channels for knowledge sharing within organisations to promote continuous learning and improvement

Assessor Guidance	
1.	Learners should critically evaluate at least three continuous improvement methodologies, covering their principles, benefits, and challenges. Learners should analyse the importance of a continuous improvement culture, including the benefits and challenges for the sales function. Learners should evaluate the role of sales leaders, and the impact of at least two internal and two external factors, providing relevant organisational examples.
2.	Learners should collect data using relevant analytical tools. They should use at least three data sources, to identify trends, root causes, and improvement areas within the sales function. The findings should be interpreted and presented in a structured report, including visual aids like charts and graphs to support their conclusions and recommendations.

3.	Learners should develop a detailed plan for continuous improvement in the sales function based on their analysis findings. They must allocate resources, communicate the plan to stakeholders to secure their buy-in, and implement the agreed initiatives. Progress should be monitored and evaluated against set objectives and KPIs. Learners should document the process, reflecting on successes and lessons learned, and share best practices within the organisation.

Qualification Unit Specifications – Self

Unit Title	L5S1 Leadership in Context	
UAN	A/651/5993	
Level	5	
Credit Value	5	
Guided Learning Hours	25	
Learning Outcomes	**Assessment Criteria**	
1. Understand leadership styles within an organisational culture	1.1	Analyse the prevailing leadership styles within an organisation
	1.2	Assess the impact that the prevailing leadership styles have on sales function performance
	1.3	Evaluate the potential impact that alternative leadership styles could have on sales function performance
2. Be able to assess personal competence and leadership potential	2.1	Analyse the competencies and personal qualities required for effective leadership within an organisation
	2.2	Evaluate own leadership strengths in relation to the required competencies and qualities
	2.3	Assess own ability to apply different leadership styles in a range of situations
	2.4	Identify personal leadership development needs using tools and techniques
3. Be able to manage personal continuing professional development	3.1	Analyse the opportunities available for professional development
	3.2	Implement a professional development plan based on leadership competencies assessment
	3.3	Apply the most effective leadership styles to motivate the sales team to achieve goals
	3.4	Reflect on personal leadership performance and adapt approaches to meet the needs of different team members

Additional Information	
Unit purpose and aims	To enable learners to understand leadership styles within an organisational culture. Learners will assess their personal competencies and leadership potential. They will manage their own continuing professional development in relation to leadership.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K16 Ethics and values-based leadership theories and principles, for example employee wellbeing. K18 Leadership and management tools and techniques. B4 Seeks learning opportunities and continuous professional development for self and the wider team.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	

1.	• The range of leadership theories and different leadership styles, e.g., the trait approach to leadership, the behavioural school (McGregor, Blake and Mouton), the contingency or situational school (Fielder, Hersey-Blanchard, Tannenbaum and Schmidt, Adair), leaders and followers (Servant Leadership, Team Leadership, Transactional and Transformational), dispersed leadership, values based leadership etc. • The key responsibilities of different leadership roles (line and matrix) in terms of taking responsibility, contributing to overall vision and goals, setting and providing guidance on values, setting direction for significant programmes or projects, stimulating innovation and enterprise, anticipating, planning for and leading change, overcoming obstacles, delegating, setting objectives for teams and individuals, communicating and motivating employees, supporting and developing programmes, projects, teams and individuals, modelling appropriate behaviour, representing teams and feeding back its experiences and views, protecting the team and its members • How to assess the impact of different leadership styles on individual sales professionals, sales teams and the overall organisational culture • How and why organisational values and acceptable standards of behaviour differ in organisations
2.	• Sources of information that can be used to determine the competencies and personal qualities required for effective leadership within an organisation, e.g., job description, role specification, how own role relates to organisation strategies and objectives, organisational competency framework etc. • How different leadership behaviours can be leveraged to increase organisational performance • The concept of emotional intelligence and how it applies to the leadership role • How to identify the present/future leadership skills and behaviours using a range of tools to measure against required competencies/behaviours • The tools and techniques that support evaluation of personal leadership strengths, e.g., SWOT analysis, 360-degree feedback, performance management feedback, comparison with role specification, psychometric testing, online assessments, coaching conversations etc. • Why it is important to gather feedback from line manager, team members and peers to evaluate own leadership strengths • The different qualities and behaviours that support effective leadership, e.g., attitude, ability to adapt to change, versatility, motivation, aptitudes, experience needed (previous work, voluntary work, qualifications), reflective practices etc. • Why it is important to adapt leadership styles to meet the needs of different situations and individuals • How to identify own development needs in relation to the requirements of an organisational role • How to align organisational and personal values • How to determine personal career and wider personal aspirations • The stages and activities required to develop own competence and behaviours to meet, and exceed, defined role requirements
3.	• How to develop and implement a professional development plan based on assessment of competences and feedback from others • The sources of development opportunities to improve leadership skills and behaviours, e.g. in-house and external training; learning zones in organisations e.g., induction, coaching, shadowing, self-study, mentoring, projects; APS, qualifications, life-long learning, etc. • The compromises that may be required in own attitudes and/or behaviours to meet the core values and behaviours expected by organisation • How own behaviours, attitudes and mind-sets can impact leadership in positive and negative ways • Why it is important to select learning and development experiences that are mutually beneficial to self, team members and the organisation • How to demonstrate socially awareness, e.g., empathy, organisational and 'political' awareness, service to others etc.

	• How to use SMART objectives to create a development plan that includes short, medium, and long-term goals linked to both personal and business objectives • Why it is important to ensure that professional development objectives are appropriate to needs of self, job role and organisation • The importance of understanding own strengths and limitations • Why it is important for leaders to display confidence and self-assurance by leverages personal strengths and taking calculated risks • The approaches that can be used to manage relationships, e.g., inspiring, influencing, networking, conflict management etc. • How to role model self-leadership, e.g., controlling own emotions when under stress, being open and honest with others, showing integrity and trust worthiness, being flexible, setting challenging but realistic objectives for self and others, taking ownership of significant challenges, seeing setbacks as opportunities rather than threats etc. • How to win and maintain the commitment of teams and individuals to achieve goals • Effective techniques for communicating, persuading and negotiating directly and indirectly with teams and individuals • How to select communication, persuasion and negotiation skills appropriate to different situations and people • The importance of being able to use a repertoire of leadership styles in different situations and with different people • The leader's role in supporting and mentoring team members • The different techniques that can be used to reflect on leadership practices and the benefits of committing focussed time for reflection

Assessor Guidance	
1.	Learners should analyse the prevailing leadership styles within an organisation using a least two different models/theories as a framework. They should draw conclusions using examples of observations and employee experiences to support their ideas. When assessing the impact that prevailing leadership styles have on sales function performance, learners should give specific examples that illustrate at least two positive and at least two negative effects that leadership have had on the team and individuals. Alternative leadership styles should be considered with an evaluation of at least three potential impacts that these could have.
2.	Learners should conduct a thorough analysis of the competencies and behaviours that an organisation requires. This may draw on a defined competencies framework and/or job and person specifications. Opinions of the senior leadership team may also help to support the analysis as there should be clear evidence provided to support the learner's opinions and conclusions. The required competences and behaviours that have been used in response to AC2.1 should be used for AC2.2 as a framework for measuring personal leadership strengths. Feedback from at least two other people should be used to support the evaluation. Learners should provide examples of their ability to apply different leadership styles in at least three different situations, with clear reference to the impact that their choice of style had on individuals and the sales function. When identifying personal development needs, at least two tools/techniques should be used to help define at least four development actions.
3.	Learners should use their identified actions from AC2.4 to explore ways that their development needs could be met. Examples of potential options should be provided, with rationale for their chosen development activities. The actions should be implemented, and the plan updated as learners make progress towards the achievement of their goals. Evidence of applying what they have learned into their day-to-day practice should be provided to support AC3.3, with associated reflective practice activities to illustrate learning and progress, e.g., a journal.

Unit Title	L5S2 Manage Ethical, Legal and Professional Requirements		
UAN	D/651/5994		
Level	5		
Credit Value	4		
Guided Learning Hours	20		
Learning Outcomes	**Assessment Criteria**		
1. Understand ethical and legal requirements related to the sales function	1.1	Assess the ethical and legal requirements that relate to the sales function	
	1.2	Analyse the potential impact of ethical and legal concerns on the sales function and organisation	
	1.3	Evaluate the effectiveness of organisational policies and procedures to meet ethical and legal requirements	
2. Understand professional requirements related to the sales function	2.1	Assess professional requirements that relate to the sales function	
	2.2	Analyse the potential impact of professional requirements on the sales function and organisation	
	2.3	Evaluate the effectiveness of organisational policies and procedures to meet professional requirements	
3. Be able to implement policies and procedures to ensure compliance with ethical and legal requirements	3.1	Provide resources and support to the sales function to ensure that sales professionals adhere to organisational ethical and legal requirements	
	3.2	Create a workplace environment that supports open communication related to ethical and legal requirements	
	3.3	Monitor the application and effectiveness of ethical and legal organisational policies and procedures	
4. Be able to take action to respond to non-compliance	4.1	Resolve any failures to meet ethical and legal requirements	
	4.2	Report any failures to meet ethical and legal requirements to relevant stakeholders	

Additional Information	
Unit purpose and aims	To enable learners to understand ethical, legal and professional requirements related to the sales function. Learners will implement policies and procedures to ensure compliance and take action to respond to non-compliance.
Details of the relationship between the unit and apprenticeship standards	<u>**Level 5 Operations Manager Apprenticeship**</u> K16 Ethics and values-based leadership theories and principles, for example employee wellbeing. K22 Organisational policies and procedures, for example health and safety. K23 Responsible organisation policies and practices covering social, environmental, and economic factors, including sustainability. S11 Interpret and implement the practical application of regulation, legislation and organisational policies for stakeholders. B1 Acts professionally, ethically and with integrity.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The relevant (e.g. UK) legal and regulatory requirements for organisations, e.g., data protection; Competition and Markets Authority (CMA), consumer protection laws, advertising standards, contract laws, and industry-specific regulations etc. • Relevant contract laws that apply to organisations and sales professionals • The functions and people who are responsible for ensuring legal and regulatory compliance • Professional codes of conduct and ethical practice guidelines, e.g., the Institute of Sales Professionals (ISP) Code of Conduct

	• Organisational policies and procedures related to compliance • How ethical and legal requirements related to the sales function vary depending on the industry, location, and specific circumstances • The importance of truth and accuracy when selling products and services • The impact of misrepresentation or deceptive practices, such as false advertising or making misleading claims • The importance of maintaining confidentiality when dealing with sensitive information about clients or business operations • Ethical sales practices required for competing fairly and honestly in the marketplace • Practices that violate ethical standards, e.g., price-fixing, collusion with competitors, engaging in anti-competitive behaviour etc. • How to comply with data protection laws, e.g., obtaining consent before collecting personal information, safeguarding data from unauthorised access or disclosure, using customer data only for legitimate purposes etc. • The implications of compliance and non-compliance for individuals, teams and the organisation, the penalties for misrepresentation, etc.
2.	• The professional requirements that are required for different sales people at different levels, e.g., specific skills, qualifications, experience etc. • The attributes necessary for success in a particular sales profession or job role • The variety of professional requirements for different industries and sales role levels, e.g., educational certifications, technical skills, interpersonal skills, demonstration/presentation skills, industry/sector knowledge, specific software proficiency etc. • How sales professionals can avoid bribery and corruption • The importance of building trust and fostering long-term relationships with customers by providing excellent customer service, addressing customer concerns ethically, and respecting customer preferences and boundaries • Approaches for handling customer complaints and disputes fairly and promptly, e.g., by offering refunds, replacements, or other remedies as appropriate, and following established procedures for resolving conflicts • Why meeting professional requirements is essential for individuals to effectively perform their job duties and contribute to the sales profession
3.	• How to ensure that the organisation's legal and ethical policies and procedures are appropriately communicated, understood and implemented by all employees • How to select appropriate communication channels and supporting resources, e.g., intranet pages, website links, staff handbooks, discussion of daily practices that ensure compliance, regular email and team updates, etc. • Facilitating open discussions between colleagues to share experiences and challenges related to ethical practice • How to encourage peer meetings, coaching support, questioning and review between team members • Using sales meetings to gather feedback on processes and procedures to make improvements • How to ensure continued sales employee compliance with requirements • The monitoring procedures in relation to organisation's legal and ethical policies and procedures • The ongoing improvement process to ensure continued organisational compliance
4.	• How to identify and correct failures to meet legal and ethical requirements, e.g., share issues openly, apply organisational procedures correctly etc. • The range of reasons for not meeting requirements and the actions that can resolve them • How to adjust policies and procedures to reduce possible future failures • The organisational stakeholders with an interest in non-compliance • The internal procedure to highlight and address failures with stakeholders and any required reporting format and process • The methods and timescales for reporting failures

	• What actions can be taken to correct non-compliance

Assessor Guidance	
1.	Learners should assess at least three ethical and three legal requirements that relate to the sales function in their organisation. They should give examples of what constitutes compliance and non-compliance to analyse at least two potential impacts on the sales function and one potential impact on the organisation. The evaluation of the effectiveness of organisational policies and procedures should address at least one policy/procedure related to meeting ethical requirements and at least one policy/procedure related to meeting legal requirements.
2.	Learners should assess at least three professional requirements that their organisation requires their sales professionals to meet, drawing conclusions about how easy these are to meet and any challenges that sales leaders may have with these. At least two specific examples of potential impacts that professional requirements may have should be provided (these can be individual or organisational impacts). The evaluation of the effectiveness of organisational policies and procedures should address at least one policy/procedure related to meeting professional requirements.
3.	Learners should provide at least three examples of resources available to sales professionals, with supporting evidence to demonstrate that they have signposted sales professionals to access these. Feedback from colleagues should provide evidence that the learner has created a climate conducive to open discussions about ethical practices. Evidence of monitoring the application and effectiveness of ethical and legal organisational policies and procedures should cover at least a three-month period, and include any actions taken by the learner.
4.	Learners should evidence at least one situation where they have addressed a failure to meet legal and ethical requirements, giving specific examples of what happened and the actions that they took, including reporting progress to a least one relevant stakeholder. Note that anonymity of people/customers should be protected in the evidence provided.

Unit Title	L5S3 Develop Critical Thinking Skills	
UAN	F/651/5995	
Level	5	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand the skills and characteristics required for critical thinking	1.1	Define critical thinking
	1.2	Evaluate the skills required for critical thinking
	1.3	Analyse the personal characteristics that support critical thinking
	1.4	Assess own skills and characteristics for critical thinking
2. Understand the differences between beliefs, attitudes and values	2.1	Analyse the difference between beliefs, attitudes and values
	2.2	Evaluate how cognitive, affective and behavioural attitudes impact organisational decision making
	2.3	Assess the impact of own beliefs, attitudes and values on workplace judgements
3. Be able to make decisions based on critical analysis	3.1	Implement key stages of critical thinking to make workplace decisions
	3.2	Use techniques to avoid bias in critical thinking
	3.3	Engage with a range of people to explore diverse perspectives
	3.4	Apply analytical tools to make work related judgements

Additional Information

Unit purpose and aims	To enable learners to understand the differences between beliefs, attitudes and values systems. They will understand the skills required for effective critical thinking. Learners will evaluate information, arguments, and ideas in a logical and systematic way to solve organisational challenges.
Details of the relationship between the unit and apprenticeship standards	**Level 5 Operations Manager Apprenticeship** K12 Problem solving and decision-making techniques. S2 Identify problems and provide solutions. B5 Works flexibly and adapts to circumstances.
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• Definitions of what is meant by critical thinking, e.g., the ability to clarify thinking to break down a problem or a piece of information, interpret it and use that interpretation to arrive at an informed decision or judgement • The range of skills related to effective critical thinking, e.g., able to identify/verify facts, awareness of bias, analytical, identifying underlying assumptions, logical reasoning (deductive and inductive), active listening, creative thinking etc. • The personal characteristics that support effective critical thinking, e.g., curiosity, openness, receptivity to new ideas, flexibility to change opinions, clarity in communication, scepticism, confidence to question assumptions, reflective, meta-cognition, emotional intelligence etc. • The sources of information that can support assessment of personal skills and characteristics related to critical thinking • How to seek, accept and use feedback about own skills and characteristics
2.	• The definitions of beliefs, attitudes and values • How personal values differ to organisational values, and the challenges that can arise with misalignment • Cognitive attitudes, e.g., the intellectual component of critical thinking, facts and beliefs • Affective attitudes, e.g., the emotional component of critical thinking, the feelings associated with ideas • Behavioural attitudes, e.g., how people intend to behave in relation to ideas and suggestions • How individual beliefs can be changed, e.g., influenced by experience, learning, evidence, over time etc. • How individual attitudes can be changed, e.g., via persuasive messages, new information, social pressure etc. • How personal values guide individual behaviour and decision making based on what they think is important and desirable in life • The interconnections between beliefs, attitudes and value systems
3.	• The process of critical thinking, e.g., analysing and evaluating information, arguments, and ideas in a logical and systematic way • The stages of critical thinking, e.g., clarify your thinking purpose and context, question your sources of information, identify arguments, analyse sources and arguments, evaluate the arguments of others, create or synthesise your own arguments • The range of systematic models available to support organisational problem solving, e.g., DMAIC (define, measure, analyse, improve, control), 8D (Define, Team, Describe, Analyse, Verify, Develop, Implement, and Document), A3 problem solving etc. • How to engage others in debates to solve complex problems • How to avoid bias related to how information is presented and explored • Why it is important to actively seeking out diverse perspectives to enhance critical thinking • The sources of valid information related to the problem in the organisation • Ways that information and be analysed and presented to support group decision making

	• The range of people (internally and externally) who can support decision making • How to role model relevant critical thinking skills and behaviours to others • How to establish an environment conducive to sharing differing opinions • How to challenge opinions constructively • Ways that healthy debate can be supported in a team, with acknowledgment of the value that diversity of thought brings • The tools that can be used to explore diverse perspectives, e.g., Fishbone Diagram (Ishikawa), brainstorming, mind mapping, 5Whys, Pareto Chart, flowchart, decision matrix etc. • How to reach consensus and agreement with other people

Assessor Guidance	
1.	Learners should draw on a range of definitions of critical thinking, then write their own version to summarise their perspective. They should evaluate at least four skills that are required for critical thinking and analyse at least three personal characteristics. They should then use the same skills and personal characteristics to assess themselves and provide a clear summary of their strengths and development areas.
2.	Learners should analyse how beliefs, attitudes and values differ between people. They should evaluate the impact that cognitive, affective and behavioural attitudes have on critical thinking and organisational decision making, giving relevant examples to support their points. Their self-assessment should include measurement of at least three beliefs, three attitudes and three personal values, and should draw conclusions about how these all impact their workplace behaviour and judgements.
3.	Learners should identify at least two decisions that they need to make within their area of workplace responsibility. They should then follow a structured process to gather and analyse information from at least three different sources to develop their understanding. They should facilitate a discussion with other people (e.g., colleagues and customers) to engage them to share their ideas and support healthy debate about different options that are available, asking relevant questions to prompt open, honest discussions. Evidence should be provided to demonstrate how they applied analytical tools to make the decisions, and how they reached agreement about the best solution with colleagues.

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	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.	• 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

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 CPD.
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.	• 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.

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	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 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 sale's 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.

Unit Title	L6S2 Lead an Inclusive, Ethical Culture	
UAN	H/651/601	
Level	6	
Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	**Assessment Criteria**	
1. Understand the policies, procedures and practices that support inclusion	1.1	Analyse how legislation and ethical standards shape inclusion policies and procedures
	1.2	Evaluate the effectiveness of current organisational practices in promoting inclusion
	1.3	Recommend improvements to policies and procedures to enhance inclusion
2. Understand inclusive, ethical leadership	2.1	Critically assess the benefits of inclusive, ethical leadership
	2.2	Critically analyse how leaders' personal values and ethical behaviours can impact the sales team
3. Be able to role model ethical behaviours	3.1	Demonstrate behaviours that reflect commitment to diversity and inclusion
	3.2	Apply ethical decision-making processes in complex situations
	3.3	Develop strategies to address and mitigate unconscious bias within the team
4. Be able to promote an inclusive and ethical culture	4.1	Design initiatives that foster an inclusive workplace
	4.2	Implement strategies to embed inclusive practices into the sales function
	4.3	Monitor and measure the impact of inclusion initiatives on sales function performance

Additional Information	
Unit purpose and aims	To enable learners to understand the policies, procedures and practices that support inclusion and the benefits of inclusive, ethical leadership. Learners will role model ethical behaviours and promote an inclusive, ethical culture.
Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** K4 Developing Proposals S1 Working with Others S2 Consultative Selling B1 Ethics, Trust and Integrity
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• Equality and diversity legislation, e.g., the Equality Act 2010, Human Rights Act 1998 etc. • The concept of intersectionality and its importance in developing inclusive policies that address multiple dimensions of diversity

	• How to use frameworks to evaluate the effectiveness of current inclusion policies and procedures within organisations, e.g., SWOT analysis, PESTLE analysis, McKinsey 7 S framework, GAP analysis, risk matrix, audits (internal and external) • Why it is important to regularly review and update policies to align with evolving ethical standards and societal norms • The organisational policy and procedures need to be considered for compliance, e.g., pricing, sales pipeline, training and development, discipline and grievance, entertainment etc. • The differences between legal, regulatory, ethical and socially responsible requirements on the activities of an organisation • Policies and guidelines that affect the organisation, e.g., industry codes of conduct, Corporate Social Responsibility (CSR) etc.
2.	• The benefits to an organisation of an ethical and diverse workforce • How organisational leadership style and leaders influence the behaviour of employees • The impact that different leadership styles have on the sales function, the organisation and customers • How leaders' personal values and ethical behaviours can impact • The importance of self-awareness and emotional intelligence (Goleman) to leading ethically and inclusively • The principles of authentic leadership (George) and its relevance to building an inclusive working culture
3.	• The leadership behaviours that promote and demonstrate personal commitment to diversity and inclusion • How to identify both the leadership characteristics and the management actions and styles that are conducive to allowing staff to sell responsibly • How to clearly communicate and reinforce an organisation's values and ethical standards • How to encourage open communication channels where employees feel safe reporting unethical behaviour without fear of retaliation • Why it is important to offer support networks, mentorship programs, and resources to help sales teams navigate challenges and develop professionally • How to apply ethical decision-making processes in complex situations • Ethical decision-making models, e.g., Four Component Model (Rest), Ethical Framework (Kidder), Seven Step Path (Nash), Eight Step Model (Bush), Potter Box Model etc. • How to encourage diversity in hiring and promotions to ensure a varied and representative workforce • Leading by example by consistently demonstrating ethical behaviour in decision-making and actions • The concepts of misrepresentation, violation of codes of conduct, failure to honour commitments, unlawful conduct, disregard of company policy, breaches of data protection, mis-selling, bribery, misuse of confidential information, excessively high pressure selling etc. • Types of unconscious bias, e.g., affinity, halo/horns, confirmation, attribution, stereotyping, availability, anchoring, groupthink etc. • The strategies that can be used to address and mitigate unconscious bias within sales teams, e.g., awareness and training, diverse teams, objective metrics, feedback mechanisms etc. • How to foster an inclusive environment where all employees feel valued and respected, regardless of their differences • The importance of diversity training programs to increase awareness and sensitivity among employees • The approaches that promote a collaborative culture where employees are encouraged to share ideas and different perspectives • Ways to provide ongoing training about cultural competence to enhance understanding and reduce biases

	• How to develop and communicate comprehensive policies that address ethical considerations, discrimination, harassment, and other relevant issues • How to ensure transparency in decision-making processes and provide clarity on the consequences of ethical violations
4.	• The benefits from an ethical and inclusive sales function • The factors that influence an organisation's sales culture • How to foster an inclusive workplace environment by designing and implementing culture specific initiatives • The concept of psychological safety and its role in creating an environment where diverse perspectives are valued, e.g., Edmondson, Clark etc. • The organisational levers that help to embed ethical practices into the sales function, e.g., leadership commitment, codes of conduct, learning and development, performance management, organisational values and competencies, policies/procedures, whistleblowing mechanisms, transparent customer relationships, cross-function collaboration, technology etc. • Organisational Culture Models and their relevance to fostering inclusive cultures, e.g., Three Levels of Culture (Schein), Competing Values Framework (Cameron & Quinn), Cultural types (Handy), Deal and Kennedy, Cultural Dimensions (Hofstede), etc. • Change management theories/models and how to apply them to the context of promoting inclusive and ethical cultures, e.g., Kotter • The techniques and tools used to monitor and measure the impact of inclusion initiatives on sales function performance • Strategies for engaging stakeholders at all levels of the organisation in promoting inclusivity and ethics, e.g., stakeholder theory (Freeman) etc.

Assessor Guidance	
1.	Learners should analyse at least two laws and one ethical standard providing examples of how these have shaped inclusion policies and procedures for an organisation. They should identify at least three organisational practices that promote inclusion and evaluate the effectiveness of each using relevant tools/techniques to draw conclusions related to best practice. They should consider both internal and external factors that impact inclusion. Learners should propose at least three specific, actionable recommendations for enhancing inclusion, supported by evidence from their evaluation of current/best practices. They should consider potential challenges and suggest strategies to overcome them.
2.	Learners should critically assess at least five benefits of inclusive, ethical leadership, giving relevant examples to support their points. They should critically analyse how leaders' personal values and ethical behaviours impact on sales team cohesion, motivation, and overall performance. They should use workplace examples to illustrate the positive and negative impacts of leadership behaviours on team dynamics.
3.	Learners should provide examples of their inclusive behaviours in professional settings, using feedback and reflective practice to assess their impact. They should reference relevant policies/procedures and theories to support their examples. Learners should provide at least two examples of using an ethical decision model in their role as a sales leader with supporting evidence to illustrate the process, who was involved, considerations, challenges etc. Learners should explore techniques for identifying and reducing unconscious bias within sales teams. They should identify at least three types of unconscious bias in the sales team and develop strategies to address and minimise these.
4.	Learners should create detailed plans for at least two initiatives aimed at promoting inclusion. They should use a relevant change framework to structure their approach. Learners should implement at least one of their inclusion initiatives with specified metrics to measure the effectiveness.

	They should monitor and measure the impact of the inclusion initiative using relevant tools (e.g., balanced scorecards, employee surveys) and summarise the outcomes giving workplace examples to support their points.