ISP Level 6 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	31/10/24	Draft for review - KA
V1.0 SG	20/3/2025	New branding and units added
V1.1 SG	2/5/2025	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 6 Qualifications

There are a range of ISP qualifications available at Level 6:

- 15 one-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 6 Award in Developing Sales Strategy	610/5689/3	8	40	80
Level 6 Award in Delivering Sales Strategy	610/5690/X	6	30	60
Level 6 Award in Applying Market Insight	610/5691/1	6	30	60
Level 6 Award in Data-led Decision Making	610/5692/3	8	40	80
Level 6 Award in Planning and Implementing Sales Strategy	610/5693/5	8	40	80
Level 6 Award in Strategic Sales Forecasting	610/5694/7	8	40	80
Level 6 Award in Strategic Consultative Selling	610/5695/9	8	40	80
Level 6 Award in Customer Procurement Processes	610/5696/0	4	20	40
Level 6 Award in Strategic Sales Leadership	610/5697/2	6	30	60
Level 6 Award in Sales Leadership Psychology	610/5698/4	6	30	60
Level 6 Award in Leading Organisational Change	610/5699/6	8	40	80
Level 6 Award in Leading Continuous Improvement	610/5700/9	8	40	80
Level 6 Award in Risk Management	610/5701/0	8	40	80
Level 6 Award in Enhanced Leadership	610/5702/2	5	25	50
Level 6 Award in Leading an Inclusive, Ethical Culture	610/5703/4	6	30	60
Level 6 Certificate in Professional Sales	610/5704/6	Minimum 13 Maximum 36	130 to 369 hours	260 to 739 hours
Level 6 Diploma in Professional Sales	610/5705/8	Minimum 37	370 hours +	740 hours +

Description & Target Audience

The ISP Level 6 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 leader 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 6 Award qualifications can progress on to the Level 6 Certificate in Professional Sales. They can then progress onto the ISP Level 6 Diploma in Professional Sales using unit credits already achieved as there is unit overlap between qualifications.

Learners who achieve the Diploma qualification can progress on to Level 7 qualifications. They can also progress using their CPD programme.

Institute of Sales Professionals

Qualification Structures – Certificates and Diplomas in Professional Sales

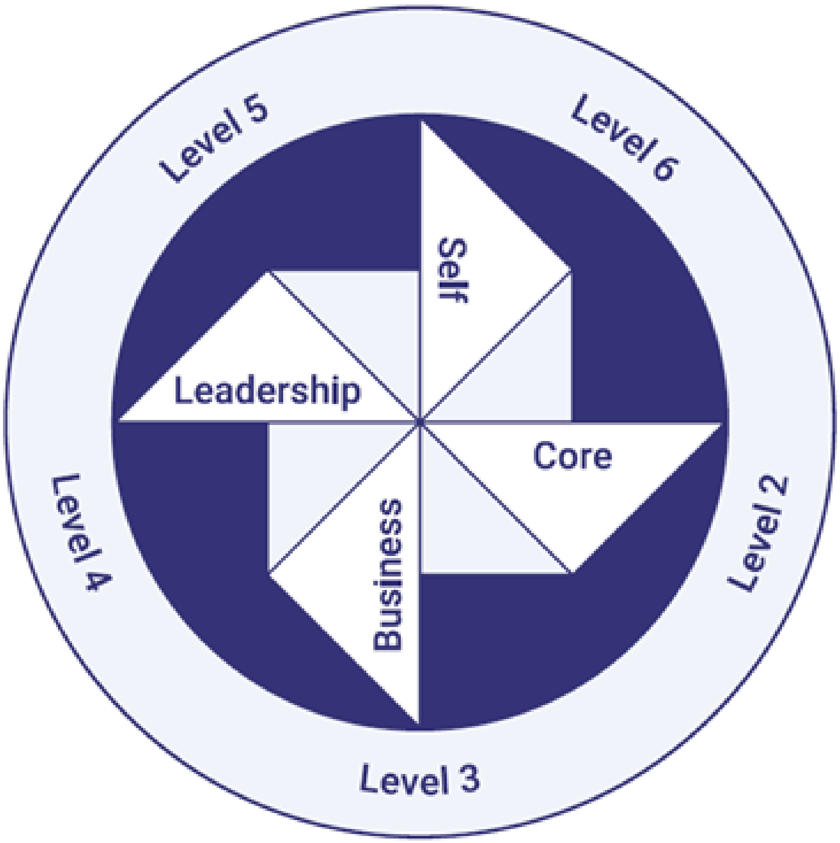
All Level 6 qualifications are constructed using a combination of units from each quadrant of ISP's Capability Framework (see image below).

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

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

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

Level 6 Competencies are represented as **Units** within this Level 6 Qualification Specification.



Delivering the Level 6 qualifications

Qualification Structures - Awards

Level 6 Award qualifications are available for one-unit qualifications in the combinations shown below:

Level 6 Award in Developing Sales Strategy

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
H/651/5996	L6B1	Develop a Sales Strategy	6	40	80	8

Level 6 Award in Delivering Sales Strategy

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/651/5997	L6B2	Deliver Sales Strategy	6	40	80	8

Level 6 Award in Applying Market Insights

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
K/651/5998	L6B3	Apply Market Insights	6	30	60	6

Level 6 Award in Data-led Decision Making

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/651/5999	L6B4	Data-led Decision Making	6	40	80	8

Level 6 Award in Planning and Implementing Sales Strategy

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
F/651/6000	L6C1	Plan and Implement Sales Strategy	6	40	80	8

Level 6 Award in Strategic Sales Forecasting

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
H/651/6001	L6C2	Strategic Sales Forecasting	6	40	80	8

Level 6 Award in Strategic Consultative Selling

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
J/651/600	L6C3	Strategic Consultative Selling	6	40	80	8

Level 6 Award in Customer Procurement Practices

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
K/651/6003	L6C4	Customer Procurement Practices	6	20	40	4

Level 6 Award in Strategic Sales Leadership

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/651/6004	L6L1	Strategic Sales Leadership	6	30	60	6

Level 6 Award in Sales Leadership Psychology

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
M/651/6005	L6L2	Sales Leadership Psychology	6	30	60	6

Level 6 Award in Leading Organisational Change

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
R/651/600	L6L3	Lead Organisational Change	6	40	80	8

Level 6 Award in Leading Continuous Improvement

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
T/651/6007	L6L4	Lead Continuous Improvement	6	40	80	8

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Level 6 Award in Risk Management

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
Y/651/6008	L6L5	Risk Management	6	40	80	8

Level 6 Award in Enhanced Leadership

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/651/6009	L6S1	Enhance Leadership Capability	6	25	50	5

Level 6 Award in Leading an Inclusive, Ethical Culture

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
H/651/601	L6S2	Lead an Inclusive, Ethical Culture	6	30	60	6

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

To achieve a Certificate, learners must pass:

- A minimum of 13 credits, maximum 36 credits
- At least one BUSINESS or CORE Level 6 unit
- At least one LEADERSHIP or SELF Level 6 unit

To achieve a Diploma, learners must pass:

- A minimum of 37 credits
- BUSINESS units totalling at least 8 credits
- CORE units totalling at least 12 credits
- LEADERSHIP units totalling at least 8 credits
- SELF units totalling at least 10 credits

Overview of units

BUSINESS units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
H/651/5996	L6B1	Develop a Sales Strategy	6	40	80	8
J/651/5997	L6B2	Deliver Sales Strategy	6	40	80	8
K/651/5998	L6B3	Apply Market Insights	6	30	60	6
L/651/5999	L6B4	Data-led Decision Making	6	40	80	8
M/651/5980	L5B3	Market Research for Sales Strategy	5	15	30	3

CORE units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
F/651/6000	L6C1	Plan and Implement Sales Strategy	6	40	80	8
H/651/6001	L6C2	Strategic Sales Forecasting	6	40	80	8
J/651/6002	L6C3	Strategic Consultative Selling	6	40	80	8
K/651/6003	L6C4	Customer Procurement Practices	6	20	40	4
Y/651/5983	L5C2	Sales Territory Management	5	30	60	6

LEADERSHIP units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
L/651/6004	L6L1	Strategic Sales Leadership	6	30	60	6
M/651/6005	L6L2	Sales Leadership Psychology	6	30	60	6
R/651/6006	L6L3	Lead Organisational Change	6	40	80	8
T/651/6007	L6L4	Lead Continuous Improvement	6	40	80	8
Y/651/6008	L6L5	Risk Management	6	40	80	8
H/651/5987	L5L2	Manage Recruitment	5	30	60	6
R/651/5990	L5L4	Coach and Mentor Sales Professionals	5	30	60	6

SELF units

Ofqual Unit Ref.	ISP Unit Ref.	Unit Title	Level	GLH	TQT	Credit
A/651/6009	L6S1	Enhance Leadership Capability	6	25	50	5
H/651/601	L6S2	Lead an Inclusive, Ethical Culture	6	30	60	6
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	25	50	5

Units selected must equate to a minimum of 50% at Level 6

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 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.

Unit Title	L6B1 Develop a Sales Strategy	
UAN	H/651/5996	
Level	6	
Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	**Assessment Criteria**	
1. Understand the factors that drive a commercially focused sales strategy	1.1	Define the key components of a commercially focused sales strategy
	1.2	Research how market trends impact on sales strategy formulation
	1.3	Evaluate the role of customer segmentation and targeting in developing a sales strategy
	1.4	Analyse the importance of competitive analysis in shaping sales strategy
	1.5	Evaluate the influence of technological advancements on sales strategy development
2. Be able to critically evaluate the current sales strategy for an organisation	2.1	Analyse the current sales strategy to determine strengths and weaknesses
	2.2	Critically evaluate the alignment of the current sales strategy with organisational goals and market conditions
	2.3	Assess the effectiveness of the current sales strategy in achieving desired organisational outcomes
	2.4	Recommend improvements based on the current sales strategy evaluation
3. Be able to propose a commercial strategy to key stakeholders	3.1	Propose a commercially focused organisational sales strategy
	3.2	Justify the proposed sales strategy with supporting data and comprehensive analysis
	3.3	Present the proposed sales strategy to key stakeholders
	3.4	Address potential concerns and objections from stakeholders regarding the proposed strategy
	3.5	Evaluate the potential impact of the proposed sales strategy on organisational performance

Additional Information	
Unit purpose and aims	To enable learners to understand the factors that drive a commercially focused sales strategy. Learners will critically evaluate the current sales strategy for an organisation and propose a new commercial strategy to key stakeholders based on their findings.

Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** K2 Sales Planning K5 Commercial Acumen K7 Applied Insights S2 Consultative Selling S6 Leveraging Digital Business B3 Interpersonal Skills
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The key components of a sales strategy, e.g., vision, mission, and objectives, value proposition, sales channels, pricing strategy, sales processes and tactics etc. • The ways that market trends impact on sales strategy, e.g., economic indicators, consumer behaviour, customer preferences etc. • How to keep up to date with relevant industry developments that affect sales strategy • The impact that technological advancements can have on the sales function and planning activities • How to conduct customer segmentation and targeting, e.g., identifying target markets, demographic, psychographic, and behavioural segmentation • How to customise sales approaches for different segments • Using competitive analysis to inform sales strategy, and how to identify and analyse key competitors within the marketplace • How SWOT analysis is used to develop sales approaches • Strategic positioning in the market • The ways that technological advancements impact on sales strategy, e.g., Customer Relationship Management (CRM) systems and data analytics, automation in sales processes, e-commerce, digital sales tools, artificial intelligence (AI) tools etc.
2.	• How to analyse current strategy, e.g., reviewing sales data and performance metrics, customer feedback and satisfaction, alignment with overall business strategy etc. • How to identify sales strategy strengths and weaknesses, e.g., internal and external influencing factors, SWOT analysis, PESTLE analysis, gap analysis etc. • Problem-solving tools, e.g., Ishikawa (Fishbone), root cause analysis, concept maps etc. • How to deliver a commercially focused sales strategy that addresses a range of factors, e.g., impact of organisational structures, current continuous improvement strategies etc.

	• The factors related to internal organisational capacity, e.g., financial, environmental, stakeholders, equipment etc. • The models/techniques available to analyse internal capacity, and how to use them, e.g., McKinsey 7-S framework, Porter's Value chain etc. • Market analysis methodologies, e.g., Porter's five forces, horizon scanning, competitive market modelling, business modelling etc. • Factors for consideration when assessing alignment with organisational strategies and effectiveness, e.g., Intellectual Property (IP), revenue or business model, innovation, marketing strategy etc. • Idea generation techniques for identifying improvements, e.g., brainstorming, De Bono's 6 Thinking hats, mind mapping

3.	• How to develop a new sales strategy that includes objectives and goals, strategic initiatives and action plans, organising sales resources (direct, indirect, partner) etc.
	
	• The techniques that can be used to justify proposals for change
	
	• How to use data-driven decision making
	
	• How to create financial projections and risk assessments related to the sales strategy
	
	• Why sales strategy alignment with business goals is critical (eg sales plan)
	
	• How to present proposed sales strategies to key stakeholders to meet their needs and interests, and secure commitment
	
	• Presenting to stakeholders using effective presentation techniques
	
	• How to tailor the message for different audiences
	
	• How to handle questions and objections when presenting new ideas
	
	• Evaluating Impact:
	  o Measuring potential outcomes
	  o Monitoring and review processes
	  o Contingency planning
	
	• The relevant commercial factors to consider when preparing a commercially focused sales strategy, e.g., value proposition, finance, internal resources, intellectual property (IP), target market, competition, cost of sales, etc.
	
	• Presentation considerations, e.g., platform, format, establishing credibility and presence, interaction, etc.

Assessor Guidance	
1.	Learners should examine at least three key components of a commercially focused sales strategy. They should evaluate how each component contributes to the overall strategy's effectiveness, providing real-world examples that explore the benefits and potential challenges of each.

	Learners should research at least three current market trends that influence sales strategy formulation, and how the trends impact strategic decisions. They should highlight the practical implications for businesses adapting to these trends. Learners should evaluate the process and importance of customer segmentation and targeting in sales strategy development. They should discuss at least three segmentation criteria and how these influence targeting strategies. Examples of how different businesses apply segmentation and targeting to optimise their sales efforts, and the advantages and limitations of these approaches should support their evaluation. Learners should analyse the role of competitive analysis in shaping sales strategies, focusing on at least three competitive analysis tools or methods. They should discuss how these tools help businesses identify opportunities and threats in the market, using specific examples to illustrate their application and effectiveness. Learners should evaluate the impact of technological advancements on sales strategy development, referring to at least three technologies. They should give examples of businesses that have successfully integrated these technologies into their sales strategies, highlighting the benefits and challenges encountered.
2.	Learners should conduct a thorough analysis of an organisation's current sales strategy, using data and tools to determine the strategy's strengths and weaknesses. They should provide a detailed overview of their findings, supported by evidence and examples. Learners should assess how well the current sales strategy aligns with the organisation's overall goals and market conditions, considering at least three factors. They should provide examples and data to support their assessment, discussing the impact of any misalignments on the organisation's performance. Learners should assess the effectiveness of the current sales strategy in achieving the organisation's desired outcomes by examining at least three performance indicators. They should discuss the implications of their findings for the organisation's strategic direction. Learners should provide actionable recommendations for improving the current sales strategy based on their evaluation. They should focus on at least three key areas for improvement, stating the potential benefits and challenges of implementing these changes.
3.	Learners should develop a comprehensive proposal for a new sales strategy that addresses the organisation's needs and market conditions and the rationale for change. The proposal should include at least three key elements that are well-structured and supported by relevant data and analysis. Learners should justify their proposed sales strategy by providing detailed analysis and supporting data for at least three areas. They should present a compelling case for their strategy, discussing the rationale behind their choices and the expected outcomes. Learners should plan and deliver an engaging and informative presentation of their proposed sales strategy to key stakeholders. They should use at least three communication methods to convey their ideas effectively and clearly address the needs/concerns of their audience. Learners should anticipate and address potential concerns and objections from stakeholders regarding their proposed sales strategy. They should identify at least three common concerns and provide reasoned responses. Learners should reflect on stakeholder feedback and explore how they could adapt their strategy to address these concerns. Learners should evaluate the potential impact of their proposed sales strategy on the organisation's performance. They should analyse at least three key performance indicators and provide projections

	and scenario analyses to support their evaluation, discussing the expected benefits and potential risks of their strategy.

Unit Title	L6B2 Deliver Sales Strategy	
UAN	J/651/5997	
Level	6	
Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	**Assessment Criteria**	
1. Understand the relationship between sales strategy and organisational strategy	1.1	Analyse the components of organisational strategy and their relevance to sales strategy
	1.2	Evaluate how sales strategy can support and drive organisational objectives
	1.3	Critically analyse the impact of organisational vision, mission, and values on the formulation of sales strategy
	1.4	Assess the role of stakeholder expectations in shaping sales strategy
2. Understand organisational sales strategy requirements	2.1	Explain the key elements of a robust sales strategy
	2.2	Evaluate how market research and analysis inform sales strategy development
	2.3	Analyse the importance of aligning sales strategy with customer needs and market trends
	2.4	Critically assess the resources and capabilities required for effective sales strategy implementation
3. Be able to plan the implementation of sales strategy	3.1	Plan the implementation of a comprehensive sales strategy that aligns with organisational goals
	3.2	Define measurable objectives and key performance indicators (KPIs) or Objectives and Key Results (OKRs) for the sales strategy
	3.3	Produce an implementation plan that includes timelines, resource allocation, and roles and responsibilities
	3.4	Implement the sales strategy using appropriate tools, techniques, and technologies
4. Be able to monitor and adapt sales strategy	4.1	Develop a monitoring framework to assess the effectiveness of the sales strategy implementation
	4.2	Analyse sales performance data to identify trends, strengths, and areas for improvement
	4.3	Adapt the sales strategy based on performance analysis and changing market conditions

	4.4	Implement changes to the sales strategy and communicate these changes effectively to stakeholders

Additional Information	
Unit purpose and aims	To enable learners to understand the relationship between sales strategy, organisational strategy and organisational requirements. Learners will plan, implement, monitor and adapt sales strategy.
Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** K2 Sales planning K3 Solution Development K4 Developing Proposals K5 Commercial Acumen S5 Psychology of Sales S6 Leveraging Digital Business B1 Ethics, trust and Integrity
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The components of organisational strategy, e.g., vision, mission, goals, objectives, core values, competitive advantage, strategic priorities etc. • How organisational strategy relates to sales strategy, e.g., alignment of sales goals with organisational goal, sales strategy as a driver for achieving competitive advantage etc. • The role of the sales function in achieving financial targets and market positioning • The ways that sales strategy supports the achievement of organisational objectives, e.g., contribution of sales to revenue growth and market share, enhancing customer satisfaction and loyalty through targeted sales strategies etc. • The sales strategy's role in new market entry and product launches • Proactive sales approaches that influence market trends • The importance of the sales feedback loop for informing organisational strategic adjustments • How ethical sales practices, corporate social responsibility, and cultural fit align with organisational values • The influence of the sales strategy on organisational culture and behaviours • Examples of companies where alignment between sales strategy and organisational vision/mission has driven success

	• How to assess the role of stakeholder expectations in shaping sales strategy • How to identify a range of stakeholders, e.g., internal (employees, management), external (customers, investors, suppliers) etc. • How to manage expectations to balance stakeholder demands with strategic goals • Effective stakeholder engagement techniques, e.g., use of relevant communication channels, feedback mechanisms, negotiation strategies, etc.
2.	• The key strategic elements of a robust sales strategy, e.g., market segmentation and targeting, value proposition development, sales process design and optimisation, pricing strategy and competitive positioning etc. • The market research methods that can be used to inform the sales strategy during its development, e.g., primary sources (surveys, interviews), secondary sources (industry reports, competitor analysis) etc. • How to select and use analytical tools, e.g., SWOT analysis, PESTLE analysis, Porter's Five Forces etc. • The data utilisation techniques that are used to translate market insights into actionable sales strategies • How to consider customer-centric approaches during analysis, e.g., understanding customer buying behaviours and preferences • How to customise sales approaches to meet diverse customer needs • How to use market trends to inform strategy, e.g., adapting to technological advancements, economic shifts, industry developments etc. • How human resources contribute to effective sales strategy execution, e.g., skills, competencies, experience levels, training needs of sales teams, etc. • The technological resources required for strategy implementation, e.g., Customer relationship management (CRM) systems, sales analytics tools, digital sales platforms etc. • Critical analysis of the benefits of partnering (internal/external) in delivering the sales strategy • The financial resources required for strategy implementation, e.g., budget allocation, cost management, ROI analysis, etc. • The organisational capabilities that impact on sales strategy effectiveness, e.g., operational efficiency, cross-functional collaboration, team agility etc.
3.	• How to plan the implementation of a comprehensive sales strategy plan that aligns with organisational goals • The components of the planning process, e.g., setting SMART objectives, identifying key success factors and potential risks etc. • How to create a strategic roadmap with clear milestones and deliverables • Why it is important to define measurable objectives and key performance indicators (KPIs) for a sales strategy

	• The key performance indicators (KPIs), Objectives and Key Results (OKRs) and metrics that are used in sales strategy, e.g., revenue targets, sales growth, market penetration rates, customer acquisition cost, customer lifetime value, conversion rates, performance metrics at individual, team, and organisational levels etc. • The formats and approaches for producing an implementation plan that meets organisations needs and can be accessed by multiple people • The components of an implementation plan, e.g., timelines, resource allocation, people/function roles and responsibilities etc. • How to create detailed action plans with deadlines • How to allocate resources (human, financial, technological) during planning • How to clearly delineate roles and responsibilities across sales and supporting teams • The tools, techniques, and technologies that are used to implement sales strategy effectively • Sales methodologies that can be adopted and how to select the most appropriate approach to meet objectives, e.g., SPIN Selling (Rackham), Consultative Selling, Solution Selling etc. • The use of technology systems for managing customer relationships and tracking sales activities • How to use digital marketing tools and techniques for lead generation and customer engagement
4.	• Approaches that can be used to develop a monitoring framework to assess the effectiveness of sales strategy • The components of a monitoring framework, e.g., regular performance reviews and reporting mechanisms, feedback loops for continuous improvement, use of Balanced Scorecard and other strategic management tools etc. • How to identify trends, strengths, and areas for improvement through structured analysis of data • The different data analysis techniques available, e.g., quantitative analysis (sales metrics, financial performance), qualitative analysis (customer feedback, sales team insights), trend analysis and forecasting etc. • How to adapt sales strategy based on performance analysis and changing market conditions • The adjustment strategies that can be implemented, e.g., tactical adjustments (such as sales tactics, promotional offers), strategic pivots (such as market re-segmentation, product repositioning) etc. • How to incorporate feedback from performance reviews and market analysis into adjustments • How to communicate strategy changes effectively to stakeholders • The change management approaches that can be used to implement changes, e.g., developing a change management plan, effective communication strategies to ensure stakeholder buy-in, training and support for sales and extended functional teams during transitions etc.

Assessor Guidance	
1.	Learners should analyse at least three components of organisational strategy and their relevance to sales strategy. They should provide specific examples to illustrate how these components influence the formulation and execution of sales strategies. Learners should evaluate how sales strategy supports and drives organisational objectives by giving detailed explanations of how sales strategies contribute to achieving broader organisational goals, using examples to support their points. Learners should critically analyse the impact of organisational vision, mission, and values on sales strategy formulation, highlighting how alignment with these elements ensures consistency and coherence in strategic planning. Learners should identify at least three key stakeholders and explain how their expectations are managed and integrated into the sales strategy, providing relevant workplace examples.
2.	Learners should concisely explain at least three key elements of a robust sales strategy, such as market segmentation, value proposition, and sales process design, with examples from their own organisation, or successful companies. Learners should evaluate at least four various research methods and analytical tools, providing examples of how these are used to develop effective sales strategies. Learners should analyse the importance of aligning sales strategy with customer needs and market trends using relevant examples to demonstrate how understanding customer behaviour and market dynamics leads to more effective sales strategies. Learners should critically assess at least two resources and two organisational capabilities that are required for effective sales strategy implementation. They should use examples to illustrate the importance of each.
3.	Learners should develop a comprehensive sales strategy plan that includes SMART objectives, key success factors, and potential risks, and aligns with organisational goals. They should identify at least three measurable objectives and two key performance indicators (KPIs) or Objectives and Ket Results (OKRs) for the sales strategy. They need to explain how these metrics are used to track progress and achieve goals, providing examples of effective KPI use. Learners should produce an implementation plan that includes timelines, resource allocation, and roles and responsibilities, with sufficient detail to ensure clarity in execution and accountability for all people involved. Learners should implement the sales strategy using at least five tools, techniques, and technologies. They need to justify the methodologies chosen.
4.	Learners should develop a monitoring framework that includes performance reviews, reporting mechanisms, and feedback loops, to assess the effectiveness of the sales strategy. They should analyse sales performance data using both quantitative and qualitative data, giving examples of how analysis has led to strategic insights and actions. Trends, strengths, and areas for improvement should be included. Learners should adapt the sales strategy using tactical and strategic adjustments, supported by performance data related to changing market conditions.

	They should communicate strategy changes effectively to all stakeholders, with examples to illustrate their successful change implementation.

Unit Title	L6B3 Apply Market Insights	
UAN	K/651/5998	
Level	6	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand the relationship between market insights and sales activities	1.1	Explain the importance of market insights in developing effective sales strategies
	1.2	Discuss how market insights can influence sales tactics and decision-making processes
	1.3	Evaluate the use of customer relationship management (CRM) systems to capture market insights
2. Understand models and theories related to using market insights	2.1	Analyse key models and theories relevant to market insights
	2.2	Analyse the application of the models and theories in shaping sales strategies
	2.3	Critically assess the strengths and limitations of different customer insight models
3. Be able to analyse data and information to provide market insights	3.1	Identify data sources for gathering market insights, including internal and external data
	3.2	Apply analytical techniques to interpret market data and extract meaningful insights
	3.3	Evaluate the reliability and validity of data sources and analytical methods used
4. Be able to apply market insights to sales activities	4.1	Develop sales strategies that incorporate market insights to meet organisational objectives
	4.2	Implement market insight-driven tactics in sales campaigns and operations
	4.3	Monitor and adjust sales activities based on ongoing market insights and feedback

Additional Information	
Unit purpose and aims	To enable learners to understand the relationship between market insights and sales activities. They will also understand models and theories related to using

	insights. Learners will analyse data and information to provide market insights and apply them to their sales leadership activities.
Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** K1 Prospecting and Qualification K4 Developing Proposals K6 Post Sales Delivery K7 Applied Insights S2 Consultative Selling S5 Psychology of Sales B4 Customer Focused
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content

1.	• The definitions of market and customers insights • The concept of market insight, including qualitative and quantitative data about customers' behaviours, needs, preferences, and motivations • The differences between customer data and market insight • The importance of customer insights in identifying market opportunities and potential threats • How to use market insight to create customer-centric sales strategies that align with overall business objectives • How leading companies have successfully integrated customer/market insights into their strategic planning • The techniques that can be used for leveraging market insights to tailor sales pitches, personalise communications, and enhance customer engagement • Role of customer feedback loops in refining sales tactics • Different types of data-driven sales tactics, e.g., targeted promotions, personalised product recommendations etc. • How to integrate customer/market insights into CRM systems to enhance functionality and user experience • How CRM data can be used to track customer interactions, predict future behaviours, and inform sales decisions • Ways that CRM tools and technologies can be evaluated
2.	• The key models and theories relevant to customer insight, e.g., the Customer Buying Journey, customer lifetime value etc.

	• The stages of the customer buying journey, e.g., awareness, consideration, decision, retention, advocacy • The function of the sales process in representing the buying journey • How customer insights can inform each stage of the buying process • The techniques used for mapping the customer journey and identifying key touchpoints • The definition and calculation of customer lifetime value (CLV) • The importance of CLV in guiding customer acquisition and retention strategies • How to maximise CLV using tailored sales approaches and customer loyalty programmes • The segmentation, targeting, and positioning (STP) model • The importance of market segmentation based on customer insights • Different strategies for targeting specific customer segments with tailored sales approaches • How to position products and services to meet the needs and preferences of target segments • Behavioural economics theories, e.g. prospect theory (Kahneman & Tversky), loss aversion (Tversky & Kahneman), the endowment effect (Thaler), anchoring (Tversky & Kahneman), hyperbolic discounting (Ainslie), mental accounting (Thaler), heuristics and biases (Tversky & Kahneman) , status quo bias (Samuelson & Zeckhauser), overconfidence (Plous), the framing effect (Tversky & Kahneman), social preferences (Fehr & Schmidt), behavioural game theory (Camerer), nudge theory (Thaler & Sunstein), fairness and equity (Rabin), bounded rationality (Simon) etc. • How to apply behavioural economics principles in understanding customer decision-making • Strategies for influencing customer behaviour based on behavioural research insights • Case studies of organisations using behavioural economics to drive sales • How to critically evaluate customer/market insight models, considering a range of factors, e.g., data quality, model assumptions, contextual relevance etc. • The potential biases and limitations in applying these models to diverse customer groups
3.	• Internal data sources, e.g., CRM systems, sales records, customer feedback, website analytics etc. • External data sources, e.g., market research reports, social media analytics, industry benchmarks, third-party data providers etc. • The ethical considerations and data privacy regulations in sourcing and handling customer data • The analytical techniques suitable for interpreting market data to gain insights • Quantitative methods, e.g., descriptive statistics, regression analysis, clustering, segmentation analysis etc. • Qualitative methods, e.g., thematic analysis, sentiment analysis, ethnographic research etc.

	• Advanced analytics, e.g., predictive modelling, machine learning algorithms, AI-driven insights etc. • How to use analytical tools to analyse customer data and generate insights related to sales leadership • How to ensure that data quality is accurate, complete, and provided in a timely manner • The methods that can be used to validate data sources and analytical outputs • How to address common data quality issues such as biases, errors, and inconsistencies
4.	• The steps in developing sales strategies that integrate customer insights • How to align sales strategies with broader business goals and market trends • The techniques used for creating ideal customer profiles (ICPs) and using them to guide strategic decisions • How to design and implement sales campaigns based on customer insights • Personalisation techniques, e.g., tailoring messages, offers, and interactions to specific individual customer needs • How to use customer/market insights to optimise sales processes and improve efficiency • How to set up systems to continuously gather and analyse customer feedback • The techniques available for monitoring the effectiveness of sales activities and campaigns • The methods that can be used for adjusting (iterating and refining) sales strategies based on new insights and changing market conditions • The key performance indicators (KPIs) for measuring the impact of customer and market insight-driven strategies • The techniques for linking market insights to sales outcomes, e.g., conversion rates, customer acquisition cost, customer retention rates etc. • How to use dashboards and reporting tools to visualise performance metrics and insights

Assessor Guidance	
1.	Learners should provide a comprehensive explanation of the significance of market insight in forming effective sales strategies. They should illustrate how customer insights can uncover needs, preferences, and behaviours, leading to more targeted and effective approaches. Learners should discuss at least two specific ways that insights influence sales tactics and decision-making processes. Additionally, they should evaluate the impact of customer insights in CRM systems, critically assessing how these insights improve data quality and customer relationship management.
2.	Learners should describe at least three key models and theories relevant to customer insight. They should analyse how these models and theories are applied to develop and shape effective sales strategies, providing practical examples to support their points. Learners should critically assess the strengths and limitations of each model, highlighting the benefits and potential drawbacks in different sales contexts.

3.	Learners should identify at least four relevant data sources for gathering customer insights, including both internal sources and external sources. They should demonstrate the application of at least two analytical techniques to interpret customer/market data and extract meaningful insights. Learners should evaluate the reliability and validity of the data sources and analytical methods used, critically assessing the strengths and limitations while addressing potential biases, errors, and inconsistencies.
4.	Learners should develop detailed sales strategies that incorporate customer insights and align with organisational objectives. They should demonstrate the implementation of customer insight-driven tactics in sales campaigns and operations, using case studies or examples of personalised marketing, targeted promotions, or optimised sales processes. They should explain methods for monitoring and adjusting sales activities based on ongoing customer insights and feedback, including setting up feedback loops, tracking performance metrics, and making data-driven adjustments to improve sales effectiveness. Examples of continuous improvement practices in sales activities should be provided.

Unit Title	L6B4 Data-led Decision Making	
UAN	L/651/5999	
Level	6	
Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	**Assessment Criteria**	
1. Understand the key data sources that support strategic decision making	1.1	Identify key data sources relevant to strategic decision making
	1.2	Evaluate the reliability and validity of data sources
	1.3	Explain how different data sources can be used to inform strategic decision making
2. Understand data requirements for team decision making	2.1	Compare the data requirements of different organisational teams
	2.2	Evaluate the role of data governance in meeting organisational data requirements
	2.3	Analyse ethical considerations related to the use of data for decision making
3. Be able to critically analyse data from a range of sources	3.1	Select appropriate data analysis techniques for different types of data
	3.2	Apply data analysis techniques to interpret data from multiple sources
	3.3	Critically evaluate the findings from data analysis
4. Be able to recommend improvements to decision making based on data analysis	4.1	Develop evidence-based recommendations for sales strategy
	4.2	Communicate recommendations effectively to key stakeholders
	4.3	Evaluate the risks and potential impact of the recommendations on organisational performance

Additional Information	
Unit purpose and aims	To enable learners to understand the key data sources that support strategic decision making and different organisational team requirements. Learners will

	critically analyse data from a range of sources and drive improvements to sales strategy.
Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** K1 Prospecting and Qualification K2 Sales Planning K5 Commercial Acumen K7 Applied Insights S6 Leveraging Digital Business
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The internal data sources available to support data-led decision making, e.g., sales reports, customer databases, financial reports etc. • The information that sales reports provide, e.g., sales trends, customer preferences, product/service performance etc. • The data that is provided by customer databases, e.g., analysing customer demographics, behaviours, purchase history etc. • How financial records can be used to support strategic decision making, e.g., examining revenue, expenses, profitability, financial health indicators etc. • The external data sources available to support data-led decision making, e.g. market research reports, industry trends, competitive analysis etc. • How market research reports support decision making, e.g., gaining insights into market size, growth rates, competitor analysis etc. • The data available that relates to industry trends, e.g., identifying emerging trends, technological advancements, regulatory changes etc. • Competitive Analysis, e.g., understanding competitors' strategies, pricing, market positioning etc. • The techniques used to evaluate the reliability and validity of data sources • How to assess the credibility of data sources through cross-referencing and validation • Construct validity- how to ensure that data measures what it claims to measure in relation to strategic decisions • Content validity – how to confirm that data adequately covers all relevant aspects of the decision-making context • How to use data to identify opportunities, mitigate risks, and drive strategic initiatives

	• The approaches used to integrate data from internal and external sources to conduct a comprehensive SWOT analysis • How to incorporate external data sources to assess political, economic, social, technological, legal, and environmental factors influencing strategic decisions (PESTLE Analysis)
2.	• The differing data requirements of organisational teams and the data that each collect that contributes to decision making • The available sales function data, e.g., sales performance, pipeline management, customer interactions for sales forecasting etc. • Marketing team data, e.g., customer demographics, preferences, market segmentation for targeted campaigns etc. • Finance team data, e.g., data for budgeting, financial planning, performance analysis etc. • Operations team data, e.g., inventory levels, production efficiency, supply chain management for operational decision making etc. • The role that governance plays in meeting organisational data requirements • Implementing frameworks such as COBIT (Control Objectives for Information and Related Technologies) or DAMA (Data Management Association) to establish data governance policies • How to ensure data accuracy, completeness, consistency, and timeliness through data quality management processes • Adhering to regulatory requirements such as GDPR (General Data Protection Regulation) and industry-specific regulations in managing and protecting data • The ethical considerations that apply to the use of data for decision making • How to safeguard personal data and ensuring compliance with data protection laws and regulations • How to mitigate bias in data collection, analysis, and interpretation to ensure fairness and integrity • How to obtain explicit consent for data collection • The approaches used to ensure transparency in data usage and processing practices
3.	• How to select appropriate data analysis techniques for different types of data, e.g., descriptive, inferential, predictive • How to summarising and visualising data using relevant techniques, e.g., histograms, pie charts, scatter plots etc. • How to draw conclusions and make predictions from data using techniques, e.g., regression analysis, hypothesis testing etc. • Forecasting future trends and outcomes based on historical data using techniques such as time series analysis and predictive modelling • The approaches used to interpret data from multiple sources • Ways to consolidate data from various sources and formats into a unified dataset for analysing

	• How to extract patterns, trends, and insights from large datasets using algorithms and statistical techniques • How to analyse unstructured data such as customer feedback, social media posts, and text documents to extract valuable insights • How to evaluate the findings from data analysis. • Statistical Significance - assessing the significance of findings based on statistical measures such as p-values and confidence intervals • Sensitivity Analysis - testing the robustness of analysis results by varying assumptions and inputs • Error Analysis - identifying and addressing errors, anomalies, and inconsistencies in the data analysis process
4.	• How to develop evidence-based recommendations for strategic decision making, e.g., decision trees, cost-benefit analysis, scenario planning etc. • How to structure decision-making processes based on analysis results and outcome probabilities. • Approaches that can be used to evaluate the potential costs and benefits of alternative courses of action based on data-driven insights • Anticipating multiple future scenarios and developing strategic recommendations to address each scenario • Preparing communications to meet stakeholder needs • Data Visualisation - presenting analysis findings and recommendations using visual aids such as charts, graphs, dashboards etc. • Storytelling - crafting a narrative around analysis results to engage stakeholders and facilitate understanding and buy-in • Stakeholder Engagement - tailoring communication strategies to the preferences and needs of different stakeholders to ensure effective dissemination of recommendations • How to evaluate the potential impact of the recommendations on organisational performance • Key Performance Indicators (KPIs) - establishing measurable KPIs to monitor the implementation and impact of recommendations on organisational performance • Risk Assessment - identifying potential risks and uncertainties associated with implementing recommendations and developing mitigation strategies. • Continuous Improvement - monitoring and adjusting recommendations based on ongoing evaluation and feedback to drive continuous improvement in strategic decision making

Assessor Guidance	
1.	Learners should evaluate at least two internal and two external different data sources that are used for strategic decision making in sales leadership roles.

	Learners should critically assess the reliability and validity of their selected data sources, using at least two theories/concepts. They should provide examples to show how data reliability and validity impact strategic decision making. Learners should analyse the links between motivation, compensation, and sales performance, drawing on ideas from at least three motivational theories. Examples of workplace leadership practices that relate to sales performance should be provided.
2.	Learners should compare the data requirements of at least three organisational teams. They should provide detailed examples of how data supports decision making and its alignment with organisational objectives. Learners should critically evaluate the role of data governance in meeting organisational data needs. They should discuss the impact of data quality management, compliance, and regulation on data governance practices. Learners should analyse ethical considerations associated with data usage in strategic decision making, such as data privacy and bias mitigation. Using relevant theories and workplace examples, they should demonstrate an understanding of ethical dilemmas and responsibilities in data-driven decision making.
3.	Learners should select and justify at least two data analysis techniques that they have used with different data sources to make decisions. Learners should demonstrate proficiency in extracting insights relevant to strategic decision making and provide workplace examples of how each technique has informed their strategic decision making in their sales leadership role. Learners should critically evaluate analysis findings, considering factors like statistical significance and potential biases. They should assess the accuracy and reliability of analysis results, providing examples of strengths, weaknesses, and limitations, identifying the implications for strategic decision making.
4.	Learners should develop at least four evidence-based recommendations for sales strategy. They should communicate their recommendations to at least three key stakeholders in a structured way that meets their needs and expectations. Learners should evaluate at least three potential risks and associated impacts that their recommendations may have on their organisation's performance.

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.

Qualification Unit Specifications – Core

Unit Title	L6C1 Plan and Implement Sales Strategy
UAN	F/651/6000
Level	6
Credit Value	8
Guided Learning Hours	40

Learning Outcomes	Assessment Criteria	
1. Understand the components of a sales strategy	1.1	Summarise the key elements of a sales strategy
	1.2	Analyse the role of customer segmentation in developing a sales strategy
	1.3	Evaluate sales methodologies and how they apply to different sales contexts
	1.4	Assess the impact of competitive analysis on the formulation of a sales strategy
2. Understand strategic sales planning processes	2.1	Summarise the stages of the strategic sales planning process
	2.2	Assess the role of market research in the strategic sales planning process
	2.3	Evaluate the use of sales forecasting in strategic planning
3. Be able to implement a sales strategy	3.1	Produce a sales plan based on strategic objectives
	3.2	Identify and allocate resources to implement the sales plan
	3.3	Analyse potential risks and develop contingency plans to address them
	3.4	Demonstrate effective communication of the sales strategy to the sales team
	3.5	Implement the sales plan using appropriate sales tactics and techniques
4. Be able to monitor, evaluate and adapt sales strategy	4.1	Create key performance indicators (KPIs) to monitor the effectiveness of the sales strategy
	4.2	Use data and analytics to evaluate sales performance against targets
	4.3	Identify areas for improvement based on performance data and feedback
	4.4	Implement changes to the sales strategy in agreement with stakeholders

Additional Information	
Unit purpose and aims	To enable learners to understand the components of a sales strategy and the associated planning processes. Learners will be able to implement a sales strategy, then monitor, evaluate and adapt it to ensure success.

Details of the relationship between the unit and apprenticeship standards	**<u>Level 6 Business to Business Sales Professional Apprenticeship</u>** K2 Sales Planning K5 Commercial Acumen K6 Post Sales Delivery S1 Working with Others S5 Psychology of Sales S6 Leveraging Digital Business B3 Interpersonal Skills B4 Customer Focused
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content

1.	• The key elements of a sales strategy, e.g., goals and objectives, target market identification, value proposition, sales process, sales enablement, performance metrics, competitive analysis etc. • The relevant industry regulations and ensure that sales strategies comply with them • How to identify and prioritise target customer segments based on demographics, psychographics, buying behaviour etc. • How to craft clear and compelling value propositions that address customer needs and differentiate from competitors • The importance of exploring direct and indirect sales channels, including digital and physical channels, and their strategic importance • How to determine the optimal sales team structure based on your target market and sales cycle • How to develop a compensation plan that aligns with sales goals and motivates sales professionals • Segmentation criteria, e.g., geographic, demographic, psychographic, behavioural, psychographic, firmographic etc. • The different market targeting strategies, e.g., differentiated, undifferentiated, concentrated, micromarketing, local etc. • The range of sales methodologies that can be applied, e.g., solution selling, consultative selling, Rackham's SPIN Selling (situation, problem, implication, and need-payoff), Sandler's PABAN (pain, budget, authority, need, timeline), MEDDIC (market, economic buyer, decision criteria, decision process, identify, champion) etc.

	• How to leverage Customer Relationship Management (CRM) systems and other sales tools to improve efficiency and productivity • How to conduct competitive analysis, e.g., SWOT (strengths, weaknesses, opportunities, threats), Porter's Five Forces, benchmarking, competitive profiling, gap analysis, visualisation tools etc. • How the competitive analysis findings are used when developing the sales strategy
2.	• The different stages of strategic sales planning in organisations • How to define SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals • How to conduct a thorough analysis of the internal and external environment, e.g., SWOT (strengths, weaknesses, opportunities, threats), PESTLE (political, economic, social, technological, legal, environmental) • Action planning processes and the people involved • How to create detailed action plans with timelines and responsibilities • How to ensure that sales strategies support the overall organisational strategy and agreed goals • Cross-functional collaboration required to ensure cohesive strategy implementation, e.g., marketing, finance, and operations teams • Primary and secondary market research, including methods for collecting market data • How to use qualitative and quantitative data to understand customer needs and preferences • How to identify and analyse competitors' strengths, weaknesses, and strategies • The techniques used to improve the reliability of sales forecasts. E.g., data-driven approaches (historical data, statistical modelling, market research, CRM data), qualitative (expert judgement, Delphi method, market surveys), hybrid approaches (combination forecasting, scenario planning, sales pipeline management), etc. • How to accurately predict sales revenue to optimise resource allocation
3.	• How to translate high-level strategies into operational plans • How to identify potential risks and develop contingency plans • How to implement different approaches for different sales scenarios, e.g., cold calling, networking, social selling, etc. • How to assign sales team roles and responsibilities • How to budget for sales activities and initiatives

	• How to leverage technological resources for successful implementation, e.g., CRM systems, sales automation tools, data analytics etc. • Communicating plans to the sales team so that they understand and are aligned with the strategy • The importance of communicating with other departments and external stakeholders • How to put the sales plan into action, managing activities, and addressing challenges
4.	• The Key Performance Indicators (KPIs) relevant to the organisation and sales function • The range of sales metrics, e.g., revenue, profit margins, market share, customer acquisition cost, customer lifetime value etc. • The use of leading versus trailing metrics • How to use activity metrics, e.g., number of sales calls, meetings, and proposals • How to use CRM and analytics tools to track sales performance • How and when to collect feedback from customers, sales team members and other stakeholders • The techniques used to identify areas for improvement during implementation, e.g., gap analysis • How to apply Lean and Six Sigma principles to sales processes for continuous improvement • The importance of modifying sales tactics based on performance data and market changes • The approaches for communicating changes to plans to ensure all stakeholders are informed about strategy adaptations and the rationale • The documentation required by the organisation and how to keep detailed records of strategy changes and their outcomes for future reference

Assessor Guidance	
1.	Learners should provide a comprehensive summary of the key elements of a sales strategy, including target markets, value propositions, sales channels. They should analyse the importance of customer segmentation and evaluate at least three sales methodologies, using relevant theories and models to illustrate how they apply to different sales contexts. Learners should assess the impact of competitive analysis on the formulation of a sales strategy giving relevant workplace examples to support their points.

2.	Learners should summarise the strategic sales planning stages, detailing how they align with organisational objectives. They should assess the role of market research and sales forecasting in strategic planning, using workplace examples and theoretical frameworks to support their analysis of the planning process.
3.	Learners should produce an actionable sales plan, detailing strategic objectives, resource allocation, and implementation tactics. Practical examples of resource use, risk analysis, and contingency planning should be provided to support their implementation strategy. They should provide evidence of effective communication of the sales strategy to the team and the implementation activities.
4.	Learners should create at least three KPIs to monitor the sales strategy and use data analytics to evaluate performance during implementation. They should identify at least two areas for improvement and document changes to the strategy based on performance data and feedback. Examples of adaptations and their communication to stakeholders should be included to illustrate their evaluative processes.

Unit Title	L6C2 Strategic Sales Forecasting	
UAN	H/651/6001	
Level	6	
Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	**Assessment Criteria**	
1. Understand the factors that inform long-term sales forecasting	1.1	Analyse the internal and external factors that influence sales forecasting
	1.2	Evaluate the impact of market trends on sales forecasting accuracy
	1.3	Assess the role of historical sales data in developing sales forecasts
	1.4	Explore the significance of economic indicators in sales forecasting
2. Understand sales forecasting techniques	2.1	Compare sales forecasting methods
	2.2	Analyse qualitative and quantitative sales forecasting techniques
	2.3	Evaluate the benefits and risks of using technology for sales forecasting processes

3. Be able to analyse the relationship between sales forecasting and organisational planning	3.1	Analyse how long-term sales forecasting informs strategic organisational decisions
	3.2	Explore the integration of sales forecasts into organisational strategic planning processes
	3.3	Evaluate the impact of accurate sales forecasting on resource allocation and budgeting
	3.4	Assess the role of cross-functional collaboration for improving the accuracy of sales forecasts
4. Be able to monitor actual sales against forecast sales	4.1	Implement sales tracking system to review actual versus forecast sales
	4.2	Analyse variances between actual and forecast sales to identify trends and deviations
	4.3	Develop strategies to address significant variances between actual and forecast sales
	4.4	Evaluate the effectiveness of sales forecasting adjustments based on performance monitoring

Additional Information	
Unit purpose and aims	To enable learners to understand the factors that inform long-term sales forecasting, and the techniques that are used to forecast. Learners will analyse the relationship between sales forecasting and organisational planning. They will also monitor actual sales against forecast sales for an organisation.
Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** K2 Sales Planning K3 Solution Development K7 Applied Insights S5 Psychology of Sales S6 Leveraging Digital Business B1 Ethics, Trust and Integrity
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	

1.	• The internal factors that influence sales forecasting, e.g., organisational goals and objectives, sales team performance and capabilities, product lifecycle stages (e.g., introduction, growth, maturity, decline), historical sales data and trends etc. • The external factors that influence sales forecasting, e.g., market conditions and competitive landscape, economic indicators (e.g., GDP, inflation rates), technological advancements, regulatory and legal changes etc. • How to contrast strategic and operational forecasting • How market trends impact sales forecasting accuracy • The methods for identifying and analysing market trends • The impact of buyer behaviour and preferences on forecasting • How to use of market research reports and industry analyses for forecasting • Case study examples of how market trends influenced sales forecasts in different sectors and markets • The importance of accurate and comprehensive sales data for forecasting • The methods used to collect and analyse historical sales data for use in forecasting • How to use sales data for trend analysis and pattern recognition • The limitations of relying solely on historical data for future forecasting • The different types of economic indicators (leading, lagging, and coincident indicators) • How to analyse specific indicators, e.g., unemployment rates, interest rates, consumer confidence indices etc.
2.	• The overarching sales forecasting methods used to predict future sales • Historical Forecasting: using past sales data to predict future trends • Market-Based Forecasting: analysing market trends and competitor actions • Salesforce-Based Forecasting: relying on sales team input and estimates • The range of qualitative sales forecasting techniques available, e.g., expert opinion (Delphi method, panel consensus), market research (surveys, focus groups), sales force composite etc. • The range of quantitative sales forecasting techniques and models available, e.g., time series analysis (moving averages, exponential smoothing, ARIMA models), causal models (regression analysis, econometric models), simulation models (Monte Carlo) etc. • How the forecasting techniques can be applied in different business contexts • The advantages and limitations of the different sales forecasting techniques

	• The ways that technology can enhance and hinder the sales forecasting process • The role of Customer Relationship Management (CRM) systems and Enterprise Resource Planning (ERP) software in sales forecasting • How AI and machine learning can be used for predictive analytics • The benefits of automated forecasting tools
3.	• How to link sales forecasts to strategic planning and goal setting • The impact of strategic planning on market entry strategies, product launches, and marketing campaigns • Case studies illustrating strategic decisions influenced by sales forecasts • The business planning process for integrating sales forecasts into business plans • The role of sales forecasting in operational planning, including production and inventory management • Aligning sales forecasts with financial planning and budgeting processes • The importance of accurate forecasts for resource allocation • How to budget for sales and marketing activities based on forecast data • How to manage financial risks and uncertainties through forecasting • The importance of collaboration between sales, marketing, finance, and operations • The strategies that can be used for building and maintaining cross-functional communication and collaboration • The impact that collaborative forecasting can have on forecast accuracy
4.	• How to design systems for real-time sales tracking and reporting • The different Key Performance Indicators (KPIs) that are used to track sales performance • How to use dashboards and reporting tools • Examples of effective sales tracking systems • The methods used for conducting variance analysis between actual and forecast • How to identify the root causes of variances • The impact of variances on strategic decisions and corrective actions • Long and short-term corrective measures that can be taken to manage variances • The importance of adjusting sales tactics and strategies and how to make changes to approaches • How to revise forecasts and business plans based on variance analysis

	• How to monitor the impact of adjustments on sales performance • The importance of continuous improvement processes for forecasting accuracy • Feedback loops between sales monitoring and forecasting

Assessor Guidance	
1.	Learners should analyse at least three internal and three external factors influencing sales forecasting, using sector-specific examples, and discussing how each factor impacts forecast accuracy and relevance. They should evaluate the impact of market trends, providing at least three examples of how different trends have influenced sales forecast accuracy. Learners should assess the importance of historical sales data, using at least two case studies. They should illustrate how historical data informs sales forecasts and cover the limitations of relying on past data. Learners should discuss the significance of at least two economic indicators in sales forecasting, using workplace examples. They should evaluate how each indicator affects sales forecasts and organisational decision-making.
2.	Learners should compare at least three sales forecasting methods, highlighting their similarities and differences. Supporting examples should be provided to support points Learners should analyse at least three qualitative, at least three quantitative, sales forecasting techniques, discussing their advantages and disadvantages. They should provide examples of when each technique is most effective. Learners should evaluate the role of technology in sales forecasting, providing examples of at least two technological tools. They should discuss the benefits and risks associated with using these tools in forecasting processes.
3.	Learners should analyse the impact of long-term sales forecasting on strategic organisational decisions, using at least two examples to illustrate how accurate forecasting influences long-term planning and business strategy. They should discuss the integration of sales forecasts into strategic planning processes, providing at least two examples. Learners should evaluate the impact of accurate sales forecasting on resource allocation and budgeting, using at least two examples to demonstrate how precise forecasting aids in effective resource management. They should assess the role of cross-functional collaboration in improving forecast accuracy, using examples that cover strategies for enhancing communication and coordination between departments.
4.	Learners should implement a system for tracking sales performance. They should summarise key features of the system and how it aids in comparing actual sales against forecasts.

	Learners should conduct variance analysis to identify trends and deviations between actual and forecast sales, explaining the significance of these variances. They should develop strategies to address at least two significant variances between actual and forecast sales and include both short-term and long-term corrective measures. Learners should evaluate the effectiveness of at least two forecast adjustments they have made based on performance monitoring, including the impact of these adjustments on future sales forecasting accuracy.

Unit Title	L6C3 Strategic Consultative Selling	
UAN	J/651/6002	
Level	6	
Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	**Assessment Criteria**	
1. Understand the importance of customer relationship management at board/senior levels	1.1	Evaluate the key principles of strategic customer relationship management (CRM) and its application at senior levels
	1.2	Critically analyse the importance of establishing and maintaining relationships with board-level stakeholders
	1.3	Assess the role of senior leadership in driving CRM initiatives and creating a customer-centric culture
2. Understand how to analyse major customers' needs to determine mutually beneficial goals	2.1	Conduct an analysis of major customers' organisational structures, strategies, and market positions
	2.2	Compare the key business needs and challenges faced by major customers
	2.3	Evaluate the potential for aligning organisational offerings with the strategic goals of major customers
3. Be able to develop plans and achieve mutually beneficial goals with major customers	3.1	Produce a strategic plan that aligns with the business objectives of both the organisation and its major customers
	3.2	Develop actionable steps and timelines for implementing the strategic plan with major customers
	3.3	Allocate resources to achieve the mutually beneficial goals
	3.4	Demonstrate effective negotiation and collaboration skills to secure agreement and commitment from major customers

	3.5	Adapt the plan based on ongoing monitoring, feedback and changing circumstances to ensure continued alignment and success
4. Be able to evaluate the success of strategic relationship activities to develop ongoing plans	4.1	Conduct a comprehensive review of strategic relationship outcomes against set KPIs
	4.2	Evaluate relationship activities to identify areas for improvement and development
	4.3	Provide recommendations for ongoing strategic relationship management to sustain and enhance customer partnerships
	4.4	Create a continuous improvement plan to refine strategic consultative selling approaches based on evaluation insights

Additional Information	
Unit purpose and aims	To enable learners to understand the importance of customer relationship management at board/senior levels. They will understand how to analyse customers business needs to determine mutually beneficial goals. Learners will develop plans and achieve mutually beneficial goals with major customers and evaluate the success of strategic relationship activities to develop ongoing plans.
Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** K7 Applied Insights S1 Working with Others S2 Consultative Selling S5 Psychology of Sales B3 Interpersonal Skills B4 Customer Focused
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The key principles of strategic customer relationship management (CRM), e.g., definition and scope, customer centricity, role in building long-term customer relationships, data driven decisions, strategic partnerships, business enablement, innovation, agility, social responsibility etc. • The importance of data and analytics in strategic CRM

	• Customer Lifetime Value (CLV) and its significance • The impact of effective CRM when operating at Board and senior levels • How CRM aligns with and supports the strategic objectives of different organisations • The role of CRM in enhancing customer satisfaction and loyalty • The methods used to establish and maintain Board and senior level relationships, e.g., personal branding, demonstrating strategic thinking, delivering results, building a high-performing salesforce, pro-active engagement, networking, storytelling, leveraging data and analytics, response speed, crisis management etc. • The role of trust and credibility in relationships with senior stakeholders. • How to build rapport and understand the decision-making process at the board level • Strategies for engaging board members and senior executives • The roles of senior leadership in different types of organisations • The leadership theories relevant to CRM, e.g., transformational leadership • The importance of senior leadership buy-in and support for CRM initiatives. • Strategies for fostering a customer-centric culture within the organisation • Models such as Kotter's 8-Step Change Model for creating a customer-centric organisation
2.	• How to conduct a thorough analysis of major customers' organisational structures, strategies, and market positions • The tools and frameworks for analysing customer organisations, e.g., SWOT Analysis, PESTLE Analysis etc. • The range of customer business models, revenue streams, and market positioning • The techniques used for gathering customer data, e.g., CRM systems, Sales Force Automation (SFA), customer surveys, social media listening, web analytics, market research, sales professional feedback etc. • The techniques used for interpreting customer data, e.g., customer segmentation, sales performance analysis, customer lifetime value (CLTV), win/loss analysis, sales funnel analysis, predictive analytics, data visualisation etc. • The tools and technologies available, e.g., CRM software (e.g., Salesforce, HubSpot, Zoho etc.), data analysis tools (e.g., Excel, Tableau, Power BI etc.), market research tools (e.g., SurveyMonkey, Qualtrics etc.), social listening tools (e.g., Hootsuite, Brandwatch etc.) • How to identify the key business needs, challenges faced by major customers and identifying pain points, e.g., direct customer interaction, data analysis, indirect

	information gathering (e.g., industry publications, competitor analysis, economic forecasts, supplier relationships etc.) • The use of empathy mapping and customer journey mapping to understand customer experiences and expectations • Value proposition design and its relevance to customer needs • How to develop a customer-centric value proposition. • Examples of successful alignment between organisations and major customers
3.	• The key components of strategic planning • How to leverage frameworks like the Balanced Scorecard and Ansoff Matrix to structure strategic thinking • How to ensure that organisational sales strategy and goals are aligned with customer needs and expectations • The project management principles and tools that help to translate strategy into actionable steps • The importance of establishing SMART objectives to provide focus and direction • The techniques used for efficient timeline and milestone management • How to identify, secure, and deploy the necessary financial, human, and technological resources • How to conduct a cost-benefit analysis and develop comprehensive budgets • How to implement strategies to identify, assess, and mitigate potential risks • How to employ collaborative negotiation techniques to encourage agreement among customer stakeholders • The strong interpersonal skills and behaviours that are required to build and maintain relationships • The range of communication theories, e.g., rhetorical, phenomenology, socio-psychological etc. • The range of communication models, e.g., linear, interactive, transactional etc. • Techniques for active listening and questioning to uncover customer needs. • Negotiation strategies and tactics, e.g., win-win negotiation, BATNA, ZOMA, etc • The key features of successful collaboration with key customers • How to implement the PDCA cycle to drive ongoing performance enhancement • The challenges of establishing mechanisms for gathering and responding to feedback

	• How to adjust plans in response to changing circumstances
4.	• How to define KPIs aligned with CRM goals and strategic partnerships • How to implement a Balanced Scorecard framework for comprehensive performance measurement • How to ensure that KPIs directly support overall strategic objectives • The approaches and methods used to review strategic relationship outcomes in different organisations • The employment of data collection methods (surveys, dashboards) to analyse performance • How to measure outcomes against established KPIs to assess success • The importance of identifying key strengths and areas requiring improvement • The improvement opportunities that can be identified through relationship management • How to conduct gap analysis to compare expected and actual results • Using root cause analysis to uncover underlying problems • The approaches used to establish ongoing feedback mechanisms with the customer to drive continuous improvement in offers • How to develop actionable strategies based on data-driven insights • The formats that can be used for proposing strategies to customers and peers • How to leverage strategic foresight and scenario planning for future-oriented recommendations • The importance of promoting best practices for building and maintaining strong customer partnerships • How to create a continuous improvement plan to refine strategic consultative selling approaches using relevant models, e.g., Kaizen, Six Sigma • The importance of integrating lessons learned into future strategic planning cycles • The approaches that create a culture of continuous improvement within the sales team and organisation

Assessor Guidance	
1.	Learners should evaluate at least three CRM strategies and their application at senior levels, detailing the principles and benefits of each.

	They should critically analyse the significance of board-level relationships and assess how leadership influences CRM effectiveness. Workplace examples of successful CRM initiatives should be included.
2.	Learners should conduct an analysis of at least two major customers' organisational structures, strategies, and market positions. They should use at least three analytical tools to compare these major customers' business needs and identify key business challenges. The findings should then be aligned to organisational product/service offerings to identify matches.
3.	Learners should produce a comprehensive strategic plan. They should outline a timeline, and at least four actionable steps and at least four resources needed to achieve the objectives set. Learners should demonstrate effective negotiation skills to secure commitment from at least two major customers. Examples of successful strategic collaborations should be used to illustrate the implementation of the plan, allocation of resources and adaption of the plan on at least two occasions as a response to monitoring, feedback and changing circumstances.
4.	Learners should conduct a comprehensive review of strategic relationship outcomes against set KPIs for at least two major customers. This should include an evaluation that identifies at least three areas for improvement and development for each customer, with recommendations for ongoing strategic relationship management that will sustain and enhance the partnerships. Learners should create a continuous improvement plan for the sales function that uses the evaluation insights to refine at least three consultative selling approaches.

Unit Title	L6C4 Customer Procurement Practices	
UAN	K/651/6003	
Level	6	
Credit Value	4	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
1. Understand customer procurement strategies	1.1	Analyse procurement strategies used by customers
	1.2	Compare the factors influencing customer procurement decisions
	1.3	Evaluate the role of technology in customer procurement strategies
2. Be able to influence and meet customers' needs	2.1	Analyse the drivers behind customer requirements
	2.2	Influence customer requirements to align to your proposition

	2.3	Build customer relationships to influence procurement in your favour
3. Be able to match the selling organisation's differentiated business value with customer needs	3.1	Position the unique selling propositions (USPs) of an organisation against customer criteria
	3.2	Align an organisation's product and service offer with customer needs ensuring mutual benefit

Additional Information	
Unit purpose and aims	To enable learners to understand customer procurement strategies and how the supplier influences and meets customers' needs. They will match an organisation's differentiated business value with customers' needs.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 6 Business to Business Sales Professional Apprenticeship</u>** K1 Prospecting and Qualification K3 Solution Development K4 Developing Proposals K5 Commercial Acumen K7 Applied Insights S5 Psychology of Sales S6 Leveraging Digital Business B4 Customer Focused
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The differences between centralised and decentralised procurement • Centralised single procurement department manages all purchasing activities, leading to potential economies of scale and standardised processes • Decentralised individual departments manage their own procurement, allowing for flexibility and responsiveness to specific needs • The impact of procurement strategies on purchasing decisions, e.g., examination of strategic sourcing, category management, and just-in-time purchasing etc.

	• The advantages and disadvantages of long-term supplier relationships versus transactional procurement, including cost considerations, risk management, and supplier development • The role of cost, quality, and service in procurement decisions • The importance of total cost of ownership (TCO) over initial purchase price • Quality management theories (e.g., Deming's PDCA cycle) and their impact on procurement • The customer's internal cost of implementing a new solution • The various risks the customer perceives from implementing the solution • How market conditions affect procurement choices, e.g., the influence of supply and demand dynamics, economic conditions, and market competition • The importance of compliance and regulatory requirements in procurement, e.g., regulations such as ISO standards, industry-specific regulations, and corporate social responsibility (CSR) • The impact of e-procurement systems on procurement efficiency • The benefits of e-procurement systems, e.g., increased efficiency, reduced costs, and enhanced transparency • The role of data analytics in procurement decision-making • Use of big data and predictive analytics to inform procurement decisions • Application of data-driven procurement strategies • How digital transformation influences procurement strategies • The key information categories customers need during the procurement process, e.g., technical specifications, pricing, delivery schedules, and terms and conditions etc. • The importance of sustainability and ethical sourcing information • The importance of transparency and accuracy in supplier information • The role of accurate and timely information in building trust and ensuring smooth operation • The impact of misinformation on procurement and supply chain disruptions • The impact of incomplete or inaccurate information on procurement decisions • The use of Requests for Information (RFIs) and Requests for Proposal (RFPs), e.g., the processes and best practices, their role in pre-qualifying suppliers and obtaining competitive bids etc. • Impact of technologies like blockchain and AI on procurement practices • Case studies on digital transformation in procurement.

2.	• The business needs behind the procurement requirements • Identify stakeholders who can influence procurement requirements • Change customer appreciation of their needs • The role of supplier audits and site visits • Techniques for conducting thorough audits and the importance of on-site evaluations • How to use supplier questionnaires and surveys • How to develop and use questionnaires to assess supplier capabilities and performance • How supplier performance metrics influence procurement choices, e.g., on-time delivery, defect rates, and customer satisfaction scores etc. • The importance of past performance and references in predicting future performance • The role of financial stability and risk assessments in supplier selection • The methods for evaluating financial health and mitigating risks associated with supplier insolvency
3.	• How to identify and evaluate the unique selling propositions (USPs) of an organisation • How to analyse the key features that differentiate the organisation from competitors • The role of innovation and quality in establishing USPs • The impact of brand reputation and customer service on the organisation's value proposition • How to assess how the organisation's products and services meet specific customer requirements • The importance of customisation and flexibility in aligning with customer needs • How to tailor products and services to meet the unique needs of different customer segments • How customer feedback informs the organisation's value proposition • The mechanisms for collecting and utilising feedback to refine and enhance value propositions • How USPs are communicated in sales presentations and pitches • The role of win-win in creating winning strategies • The impact of business value on pricing strategies • How to align pricing models with value propositions and customer perceptions • The role of targeted marketing campaigns and promotional activities in reinforcing the organisation's unique business value

	• How to measure the effectiveness of marketing and promotional activities in highlighting the organisation's unique value

Assessor Guidance	
1.	Learners should critically analyse at least two procurement strategies employed by customers, detailing the core principles of each strategy and their application within two different industry contexts. Learners should compare three key factors that influence customer procurement decisions, and how these factors weigh against each other in different scenarios and industries, providing analysis that highlights the complexities of procurement decision-making. Learners should evaluate how technology impacts customer procurement strategies. They should discuss tools like e-procurement systems, supply chain management software, and data analytics. The evaluation should consider at least two benefits and two potential challenges of technology.
2.	Learners should analyse the drivers behind customer requirements for at least two customers. They should provide evidence that shows at least two actions they have taken to influence at least two customers. They should demonstrate how they have built customer relationships, considering the influence of accurate, timely, and relevant information on how they select and retain suppliers.
3.	Learners should evaluate the unique selling propositions (USPs) of their organisation, identifying what sets it apart from competitors. They must provide a comprehensive analysis of at least two of their organisation's strengths, and how these USPs contribute to competitive advantage. They should analyse at least two customer requirements and preferences, and then explain how their organisation can tailor its offerings to meet these needs effectively. Examples should be provided to illustrate successful alignment strategies.

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
	2.1	Identify the key drivers for an organisation's territory management approach

2. Understand the factors that impact on sales territory management	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.

Qualification Unit Specifications – Leadership

Unit Title	L6L1 Strategic Sales Leadership	
Level	6	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand strategic sales leadership and management	1.1	Evaluate the principles of strategic sales leadership and their application in different organisational contexts
	1.2	Analyse the role of leadership in the development and implementation of a sales plan

	1.3	Critically assess the impact of leadership styles on sales team performance and organisational outcomes
	1.4	Explain the relationship between sales strategy and overall business strategy
2. Be able to lead sales in organisations	2.1	Develop a strategic sales plan that aligns with organisational goals and market opportunities
	2.2	Implement a sales strategy
	2.3	Apply sales processes and practices to enhance team effectiveness
	2.4	Develop a culture of high performance within the sales function
3. Be able to continuously improve their own leadership and management skills	3.1	Reflect on personal leadership and management practices using feedback and self-assessment
	3.2	Produce a personal development plan to enhance leadership and management skills
	3.3	Complete continuous professional development activities to stay current with best practices in sales leadership
	3.4	Apply learning from professional development activities to improve personal effectiveness as a sales leader
	3.5	Evaluate the impact of personal development on leadership effectiveness and adjust the development plan

Additional Information	
Unit purpose and aims	To enable learners to understand strategic sales leadership and management. Learners will lead sales in organisations and continuously improve their own leadership and management skills.
Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** K5 Commercial Acumen S1 Working with Others B1 Ethics, Trust and Integrity B2 Management of Self B3 Interpersonal Skills

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

Indicative Content	
1.	• The definition and scope of strategic sales leadership • The key principles of strategic sales leadership, e.g., vision setting, strategic alignment, value creation etc. • The differences between leadership and management in the context of sales • The different application of principles in organisational contexts, e.g., in SMEs, large corporations, non-profits etc. • The components of a strategic sales plan, e.g., market analysis, customer segmentation, sales forecasting, resource allocation, metrics etc. • The role of leadership in developing and implementing the sales plan • Overview of leadership styles, e.g., transformational, transactional, situational, servant leadership etc. • Leadership style theories, e.g., Blake and Mouton's Managerial Grid, Hersey and Blanchard's Situational Leadership, Burns' Transformational Leadership Theory etc. • The impact of different leadership styles on sales team performance, motivation, and organisational outcomes • How to align sales strategy with the overall organisational strategy • The importance of integrating sales goals with organisational objectives • The Balanced Scorecard approach • Case studies illustrating successful alignment of sales and business strategies
2.	• The steps required to create a strategic sales plan, e.g., setting objectives, market research, competitive analysis, strategy formulation etc. • How to align sales plans with market opportunities and organisational goals • The tools and techniques used for strategic planning, e.g., SWOT analysis, PESTLE analysis, Porter's Five Forces etc. • Setting clear, achievable objectives when executing a sales strategy • The importance of monitoring and evaluating sales performance using KPIs and other metrics • How to adjust strategies in response to market changes and performance data • How to implement effective sales processes and practices to enhance team effectiveness

	• The techniques used for improving sales team collaboration and communication • How to use technology and CRM systems to support sales processes. • The best practices for recruitment, training, and development of sales teams • The techniques used to build a high-performance sales culture in the sales function • The techniques used for motivating and engaging sales teams • The role of incentives, recognition, and career development in motivating individuals and teams • Examples of successful sales team leadership and motivation strategies
3.	• Methods and techniques that can be used for self-reflection and self-assessment • The tools for identifying personal strengths and areas for development • The importance of feedback from others in the self-assessment process • The steps used to create a personal development plan (PDP) • How to set SMART goals for personal and professional growth • How to incorporate feedback and self-assessment into the PDP • The importance of lifelong learning and professional development. • The opportunities available for training, mentoring, and networking • How to keep up-to-date with industry trends and best practices in sales leadership • Professional development activities, e.g., attending conferences, workshops, shadowing, mentoring, obtaining certifications, qualifications etc. • How to translate professional development activities into practical improvements • Ways to measure the impact of new skills and knowledge on leadership effectiveness • Tools for measuring the impact of development on leadership performance • Adjusting the development plan based on evaluation results • The methods for assessing sales leadership performance • Gathering and analysing feedback from team members, peers, and stakeholders • Identifying areas for improvement and implementing changes

Assessor Guidance

1.	Learners should evaluate at least three principles of strategic sales leadership, illustrating their application in at least two organisational contexts. They should use examples to highlight the benefits and limitations of each principle. Learners should analyse the leadership role in the development and implementation of a sales plan. They should critically assess at least three leadership styles and their impact on sales team performance, using relevant theories and models. They should include both benefits and challenges of each style. Learners should explain the alignment of sales strategy with overall business strategy, using real-world examples to demonstrate successful integration.
2.	Learners should develop a strategic sales plan that aligns with organisational goals, using current market opportunities. They should show effective leadership when implementing a sales strategy, setting objectives, and monitoring performance. Examples of adjustments based on performance data should be provided. Learners should implement sales processes that enhance team effectiveness, giving practical workplace examples. They should describe the steps taken and the impact on team performance. Learners should demonstrate at least three techniques to develop a high-performance culture, with practical examples that explain the impact on team morale and results.
3.	Learners should reflect on their personal leadership and management practices, identifying at least two strengths and at least areas for development. They should include feedback from peers and/or mentors. Learners should develop a personal development plan (PDP) with at least three SMART goals, detailing the steps and timeline for achieving these goals. They should provide evidence of engaging in at least two continuous professional development activities, and discuss the benefits gained. Learners should provide examples of how the new skills or knowledge gained from CPD have been implemented. Learners should evaluate the impact of their personal development on leadership effectiveness. They should use at least two specific examples to illustrate improvements and their ongoing areas of focus.

Unit Title	L6L2 Sales Leadership Psychology
UAN	M/651/6005
Level	6
Credit Value	6

Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand how to leverage psychological theories to motivate individual sales professionals	1.1	Evaluate key psychological theories relevant to sales leadership
	1.2	Critically analyse strategies to enhance motivation among sales professionals using psychological principles
2. Understand the factors that affect sales team dynamics	2.1	Evaluate the impact of leadership styles on sales team dynamics and performance
	2.2	Critically analyse the role of communication and conflict resolution in maintaining effective team dynamics
3. Be able to demonstrate psychology-based leadership techniques to inspire action	3.1	Assess the key factors influencing sales team dynamics
	3.2	Apply psychology techniques to inspire sales teams
	3.3	Assess the effectiveness of different leadership techniques in achieving sales targets
4. Be able to apply behavioural economic principles to sales leadership	4.1	Apply behavioural economic principles to sales leadership
	4.2	Evaluate the impact of leadership psychology on sales strategies and outcomes

Additional Information	
Unit purpose and aims	To enable learners to understand how to leverage psychological theories to motivate individual sales professionals, and the factors that affect sales team dynamics. Learners will demonstrate psychology-based leadership techniques to inspire team action and apply behavioural economic principles.
Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** S5 Psychology of Sales B3 Interpersonal Skills
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• The key psychology theories that can be applied to sales leadership • Theory of Mind and the importance of understanding the customer's perspective

	• Why it is important for effective sales leaders coach their teams to see things from the customer's point of view, allowing them to tailor their approach and build stronger relationships • The four components of Psychological Capital (PsyCap) - self-efficacy (belief in one's abilities), hope (future optimism), optimism (positive outlook), and resilience (ability to bounce back from setbacks) • How sales leaders who cultivate PsyCap within their teams can empower them to overcome challenges and achieve greater success • Ways that Social Learning Theory can be leveraged by providing coaching, mentorship, and opportunities for salespeople to observe and imitate successful colleague behaviours • How Goal Setting Theory can help teams set effective goals that drive performance and provide a sense of accomplishment • Positive Psychology: This field focuses on fostering positive emotions and strengths within individuals. Sales leaders who leverage positive psychology principles can boost their team's optimism, hope, resilience, and overall well-being, leading to higher motivation and performance • How successful sales leadership benefits from a general understanding of human motivation, persuasion techniques, and effective communication strategies etc. • The key psychological motivation theories, e.g., Maslow's Hierarchy of Needs, Herzberg's Two-Factor, Vroon's Expectancy, Deci Self-Determination etc. • Intrinsic versus extrinsic motivators • How to apply psychological theories to sales leadership practices in the workplace, e.g., via incentive and rewards programme design
2.	• Different leadership styles, e.g., situational, transformational, servant, transactional etc. • How different leadership styles can impact on sales team dynamics and performance • The importance of group cohesion in achieving team goals • How personality affects team dynamics and how to assess the impact of individual differences • The advantages of team diversity, e.g., leveraging diversity to enhance team performance and creativity • Group cohesion and social identity – how to build a strong team identity and a sense of belonging • How to promote effective communication within the team

	• Using a range of communication channels to enhance team collaboration • The role that regular communication plays in team dynamic maintenance • Identifying common sources of conflict in sales teams • How to identify and resolve team conflicts using relevant techniques, e.g., mediation, negotiation, compromise etc. • The importance of practicing active listening techniques to understand team members' perspective • How to provide constructive feedback to foster a positive team environment • Different team building activities to meet individual preferences • How to organise team activities to strengthen team bonds and improve cooperation • How to assess the impact of team-building exercises on team performance
3.	• How to apply psychology theories and techniques to inspire sales teams • Psychological persuasion techniques, e.g., reciprocity, commitment and consistency, social proof, authority, similarity/liking, scarcity etc. • How to craft and deliver messages that inspire and motivate the sales team • How to incorporate persuasive techniques to enhance the impact of messages • Using psychological techniques in personalised coaching sessions • Tailoring coaching approaches and messages to individual team members' motivations and goals • How to train the sales team to understand and empathise with customers to build trust • How to use customers pain points and needs can help tailor sales approaches
4.	• How psychological factors influence economic decision-making • How to apply behavioural economic principles to sales leadership approaches, e.g., Prospect Theory (Kahneman and Tversky), loss aversion, endowment effect, anchoring, hyperbolic discounting, mental accounting (Thaler), heuristics and biases, framing effect, social preferences, game theory, nudge theory, etc. • How to apply behavioural economics principles to develop effective pricing strategies, e.g., bundling, discounting, dynamic pricing etc. • How to analyse customer decision making processes and the factors that influence them • Designing sales approaches that align with customers' decision-making patterns. • Utilising behavioural insights to improve sales forecasting accuracy

	• How to incorporate behavioural economics into strategic planning and resource allocation

Assessor Guidance	
1.	Learners should evaluate at least four different psychological theories, highlighting the benefits and disadvantages of each when applied in a sales leadership context. They should explore how each theory relates to leadership practices and their effectiveness using relevant examples to support their points. Learners should critically analyse how psychological theories can be applied in real-world sales environments to enhance sales professionals' performance. They should consider the practical implications of implementing these theories, including potential challenges. They should include specific examples of how motivational strategies have been used in sales settings, detailing both successful outcomes and areas for improvement.
2.	Learners should evaluate the impact of at least four different leadership styles on sales team dynamics and performance. They should provide a detailed comparison of these styles, discussing their advantages and disadvantages in the context of sales teams. Workplace examples should be provided. Learners should critically analyse the importance of communication and conflict resolution in maintaining effective sales team dynamics. They should identify at least three communication techniques and conflict resolution strategies, explaining how these can be used to foster a positive team environment.
3.	Learners should assess at least three key factors that influence sales team dynamics. They should explain how each factor affects team performance, providing detailed descriptions and examples from the workplace. Learners should demonstrate their ability to apply psychological techniques to inspire sales teams as a leader. The effectiveness of these techniques should be assessed through feedback and reflection, highlighting strengths and areas for improvement. Learners should also assess the effectiveness of psychological techniques in achieving sales targets. They should compare the impact of different techniques, using workplace examples to support their assessment. They should consider factors that may influence the success of techniques, such as individual differences and situational variables.
4.	Learners should provide workplace evidence of applying at least three key concepts of behavioural economics to their leadership practice. They should explain each concept in detail, discuss its relevance to their sales leadership situation, and how they applied each. Learners should evaluate the impact of leadership psychology on sales strategies and outcomes. Examples from the workplace should be used to support their evaluation, highlighting both successful applications and potential limitations of behavioural economics/psychological theories in sales.

Unit Title	L6L3 Lead Organisational Change	
UAN	R/651/6006	
Level	6	
Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	Assessment Criteria	
1. Understand organisational change models	1.1	Critically evaluate organisational change models
	1.2	Analyse the relationship between change models and organisational contexts
2. Understand the external and internal elements of organisational change	2.1	Analyse external elements that influence organisational change
	2.2	Analyse internal elements within an organisation that can drive or hinder change
3. Be able to communicate the change vision to stakeholders	3.1	Develop a compelling change vision statement
	3.2	Produce a communication plan to convey the change vision to different stakeholder groups
	3.3	Implement the communication plan and secure stakeholder commitment
	3.4	Evaluate the effectiveness of communication strategies in promoting the change vision
4. Be able to lead the change process	4.1	Develop a comprehensive change management plan
	4.2	Implement the organisational change
	4.3	Evaluate the change implementation against objectives
	4.4	Reflect on personal leadership style and its impact on the change process

Additional Information	
Unit purpose and aims	To enable learners to understand organisational change models and the external and internal elements of organisational change. Learners will communicate the change vision to stakeholders and lead the change process.
Details of the relationship between the unit and apprenticeship standards	**Level 6 Business to Business Sales Professional Apprenticeship** K7 Applied Insights S5 Psychology of Sales B1 Ethics, Trust and Integrity

	B3 Interpersonal Skills
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales
Indicative Content	
1.	• Organisational Change Models, e.g., Lewin, Kotter, ADKAR, McKinsey, Bridges etc. • The strengths and weaknesses of different change models in terms of simplicity, flexibility, focus on people vs. processes, ability to address both incremental and transformational change, practical application etc. • How to analyse how different organisational contexts affect the suitability and effectiveness of each model, e.g., organisation size, legal structure, culture, industry/sector etc. • How to align change models/theories and approaches with the strategic goals and vision of an organisation. • The challenges associated with implementing change in organisations • How to select a change approach that aligns with organisational culture
2.	• The external (macro) elements that influence organisational change, e.g., political, economic, social, technological, legal, environmental, technological advancements, globalisation, economic cycles, demographic shifts etc. • The internal (micro) elements within an organisation that can drive or hinder change • How organisational culture affects change initiatives, e.g., norms, values, beliefs, and behaviours • How the components of organisational structure can support change, e.g., hierarchies, departmentalization, communication flows. • The resources required to initiative and support change implementation, e.g., human, financial, technological etc. • How to assess the role of external factors such as regulations and market conditions. • The approaches that can be used to evaluate internal dynamics such as leadership, employee readiness, and resistance to change
3.	• How to define the rationale for change • The characteristics of a compelling vision, e.g., clarity, inspiration, purpose, alignment with organisational values and strategy etc. • Kotter's key characteristics of a vision statement, e.g., imaginable, desirable, feasible, focused, flexible, communicable • How to frame a vision statement to focus on positives organisational outcomes

	• The organisational requirements for a change vision statement • How to identify all stakeholders that are impacted by the change, e.g., internal (employees, management, board of directors), external (customers, suppliers, investors, regulatory bodies) etc. • Assessing stakeholder needs, interests, and potential resistance using stakeholder analysis • The components and format of a communication plan that meets organisational requirements • The different channels of communication that can be used during change, e.g., meetings, emails, intranet, social media, newsletters etc. • How to determine the timing and frequency of communication to meet differing stakeholder needs • How to customise messages for different audiences • How to select suitable communication techniques to engage with stakeholders, e.g., storytelling, active listening, feedback loops, visual aids etc. • The techniques that gain stakeholder buy-in, e.g., involvement, empowerment, addressing concerns, demonstrating benefits etc. • The stages involved in implementing a communication plan • How to secure different types of stakeholder commitment • How to evaluate the effectiveness of communication strategies in promoting the change vision, e.g. using metrics and feedback tools • Adjusting communication strategies based on feedback
4.	• The key elements of a comprehensive change management plan, e.g., objectives, timelines, resources, roles and responsibilities, risk management approach etc. • The common barriers to change, e.g., lack of clarity about the rationale, change resistance, change fatigue, lack of resources, lack of buy-in, poor communication, cultural misalignment, inadequate training, unrealistic expectations/timelines etc. • The techniques that can help overcome barriers, e.g., training, incentives, consultation/involvement, transparent communication etc. • How to implement the agreed change plan • The leadership approaches that drive positive organisational change, e.g., inspiring, future focused, motivating, adaptive to circumstances, role-modelling, building trust, encouraging honest conversations, coaching etc. • The techniques and tools that are used to evaluate the change implementation against agreed objectives

	• How to monitor the change using the agreed KPIs and metrics to track progress • The importance of regular stakeholder review meetings and progress reports • How to adjust the change plan and activities based on feedback and performance • Developing adaptive strategies, contingency planning, and resource reallocation • Implementing continuous feedback mechanisms and iterative improvements • Why it is important to reflect on personal leadership style and its impact on the change process • How to reflect on personal leadership styles using self-assessment tools and frameworks • How to continuously improve leadership performance through feedback and learning

Assessor Guidance	
1.	Learners should critically evaluate the strengths and weaknesses of at least three different models of organisational change. They should consider how each model addresses both incremental and transformational change. Learners should analyse how different organisational contexts affect the suitability and effectiveness of the three models. They should provide examples of scenarios where each model may be particularly effective/ineffective and consider alignment with organisational strategic goals.
2.	Learners should assess how both external (macro) and internal (micro) elements influence the success of organisational change. They should provide examples of how these elements have impacted workplace change initiatives.
3.	Learners should create a clear and inspiring vision statement that aligns with organisational values and goals. The vision should be concise and compelling to motivate stakeholders. Learners should identify all relevant stakeholders, both internal (e.g., employees, management) and external (e.g., customers, suppliers). They should design and implement a communication plan to convey the change vision to different groups, considering their roles and interests in the change process. Learners should use metrics and feedback tools to evaluate the success of their communication strategies. They should reflect on the outcomes and suggest improvements for future communications.
4.	Learners should create a detailed change management plan that includes clear objectives, realistic timelines, a resource allocation strategy and actions. They should identify common barriers to change and propose practical solutions to address and mitigate these barriers.

	Learners should implement the change, applying leadership strategies that support and guide teams during the change process. They should monitor the progress of the change implementation to evaluate its effectiveness to achieve the agreed objectives. Learners should reflect on their own leadership style and its effectiveness in the context of organisational change. They should identify strengths and areas for improvement, supported by feedback and self-assessment tools.

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.

Unit Title	L6L5 Risk Management
UAN	Y/651/6008
Level	6

Credit Value	8	
Guided Learning Hours	40	
Learning Outcomes	**Assessment Criteria**	
1. Understand risk management within an organisation	1.1	Evaluate the key principles and concepts of organisational risk management
	1.2	Analyse the different types of organisational risks
	1.3	Evaluate the roles and responsibilities of sales leaders in risk management
	1.4	Analyse the importance of a risk management culture within an organisation
2. Be able to assess an organisation's risk management approach using a good practice framework	2.1	Identify a recognised good practice framework for risk management
	2.2	Assess the current risk management approach of an organisation against the chosen framework
	2.3	Summarise how the organisations approach to risk management impacts the sales function
	2.4	Provide recommendations for improvement based on the assessment
3. Be able to develop and implement a risk management plan for the sales function	3.1	Conduct a risk assessment to identify potential risks affecting sales operations
	3.2	Prioritise identified risks based on their potential impact and likelihood
	3.3	Produce a risk management plan including risk mitigation strategies
	3.4	Communicate the risk management plan to relevant stakeholders
	3.5	Implement the sales function risk management plan

Additional Information	
Unit purpose and aims	To enable learners to understand risk management within an organisation. Learners will assess an organisation's risk management approach and appetite using a good practice framework and develop and implement a risk management plan for the sales function.

Details of the relationship between the unit and apprenticeship standards	**<u>Level 6 Business to Business Sales Professional Apprenticeship</u>** K5 Commercial Acumen
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	The key principles and concepts of risk management: • Definition of risk and risk management • Risk vs. uncertainty • Risk appetite and risk tolerance • Risk management processes (identification, assessment, mitigation, monitoring, and review) etc. Types of Risks: • Strategic risks: market competition, changes in technology, regulatory changes • Operational risks: supply chain disruptions, IT failures, human error • Financial risks: credit risk, market risk, liquidity risk • Compliance risks: legal obligations, regulatory requirements • Reputational risks: public perception, brand damage etc. The impact of risk on organisational objectives: • Risk impacts on financial performance, market position, and operational efficiency • Case studies of organisations facing various risks and the consequences etc. The roles and responsibilities of sales leaders in risk management: • Leadership in risk identification and mitigation • Integrating risk management into sales strategy and operations • Communication and stakeholder engagement in risk management • Ethical considerations and decision-making in risk management etc. Risk Management Culture: • Importance of fostering a risk-aware culture • The components of a risk-aware culture, e.g., leadership commitment, employee engagement, and continuous learning Embedding risk management into the organisational culture

	• Leadership and employee involvement in risk management • Training and development for risk awareness etc.
2.	Good practice frameworks for risk management: • Overview of frameworks such as ISO 31000, COSO ERM, and IRM's Risk Management Standard • Comparison of different frameworks: scope, principles, and application etc. Assessing Risk Management Approaches: • Steps in conducting a risk management audit • Gathering data and documentation review • Interviews and surveys with key stakeholders etc. Strengths and weaknesses analysis: • Techniques for identifying gaps and weaknesses in current practices • SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) • Benchmarking against best practices etc. Recommendations for improvement: • Formulating actionable recommendations based on assessment findings • Prioritising recommendations for implementation • Change management considerations in implementing improvements etc. The impact of organisational risk management on the sales function
3.	Conducting a Risk Assessment: • Techniques for risk identification: brainstorming, Delphi method, checklists, scenario analysis • Tools for risk assessment: risk registers, risk matrices • Case studies of risk assessments in sales operations etc. Types of risks: • Ethics and behaviours • Levels of authorisation and approvals • Hospitality and gifts etc. Prioritising Risks:

	• Risk assessment criteria: impact and likelihood • Risk scoring and ranking methods • Use of risk heat maps to visualise risk priorities etc. Developing risk mitigation strategies: • Risk response options: avoid, transfer, mitigate, accept • Cost-benefit analysis of risk mitigation strategies • Developing contingency plans and business continuity plans etc. Producing a risk management plan: • Structure and components of a risk management plan • Integration with organisational strategy and objectives • Monitoring and reviewing risks and controls Communication and stakeholder engagement: • Techniques for effective communication of the risk management plan • Engaging stakeholders in risk management processes • Reporting and documentation standards etc. Evaluating effectiveness of risk management: • Methods for monitoring and reviewing the risk management plan • Key performance indicators (KPIs) for risk management • Continuous improvement processes: feedback loops, lessons learned

Assessor Guidance	
1.	Learners should provide a detailed evaluation of the core principles and concepts of risk management, including risk identification, assessment, mitigation, monitoring, and review. They should include the importance of understanding risk appetite and risk tolerance within an organisation. Learners should analyse at least five types of risks, providing specific examples for each type of risk and how these can impact an organisation’s objectives and operations. Learners should evaluate at least five roles/responsibilities of sales leaders in the risk management process. Learners should analyse why fostering a risk management culture is essential for organisational success. They should discuss the components of a risk-aware culture.

2.	Learners should identify and describe at least one recognised risk management framework, and explain the key principles, structure, and benefits of the chosen framework. Learners should conduct a comprehensive assessment of their organisation's current risk management approach using the identified framework. They should gather and analyse relevant data to support their assessment, summarising how the organisations approach to risk management impacts the sales function. They should highlight areas where the organisation excels and areas that need improvement. Learners should develop and present specific, actionable recommendations for improving the organisation's risk management approach based on the findings from their assessment.
3.	Learners should conduct a detailed risk assessment focused on sales operations. They should use appropriate risk identification techniques and tools to identify potential risks. They should prioritise the identified risks using a systematic approach. Learners should produce a comprehensive risk management plan that outlines the processes for risk identification, assessment, mitigation, and monitoring. The plan should be structured, detailed, and aligned with organisational objectives. Learners should develop specific risk mitigation strategies for the highest-priority risks and briefly explain their rationale for the chosen strategies. Learners should demonstrate effective communication of the risk management plan to at least three stakeholders, using appropriate communication techniques and tools to ensure that the plan is understood and supported. Once sign-off is agreed, they should evidence implementing the plan.

Unit Title	L5L2 Manage Recruitment	
UAN	H/651/5987	
Level	5	
Credit Value	6	
Guided Learning Hours	30	
Learning Outcomes	**Assessment Criteria**	
1. Understand organisational human resource planning processes	1.1	Analyse human resource planning in organisations
	1.2	Assess the impact of legal requirements on recruitment 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	L5L4 Coach and Mentor Sales Professionals	
UAN	R/651/5990	
Level	5	
Credit Value	6	
Guided Learning Hours	20	
Learning Outcomes	**Assessment Criteria**	
	1.1	Analyse the differences between coaching and mentoring

1.	Understand the purpose of sales 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.

Qualification Unit Specifications – Self

Unit Title	L6S1 Enhance Leadership Capability	
UAN	A/651/6009	
Level	6	
Credit Value	5	
Guided Learning Hours	25	
Learning Outcomes	**Assessment Criteria**	
1. Understand the characteristics of an effective leader	1.1	Critically evaluate the significance of self-awareness in sales leadership
	1.2	Analyse the key characteristics that define an effective leader
	1.3	Assess the impact of self-awareness on personal and professional leadership development
2. Understand leadership agility and resilience	2.1	Evaluate leadership agility and its significance in a dynamic organisational environment
	2.2	Analyse the core components of resilient leadership
	2.3	Critically evaluate the relationship between leadership agility and resilience

	2.4	Explore strategies to enhance leadership agility and build resilience in organisational settings
3. Be able to implement continuous personal development activities to enhance leadership performance and impact	3.1	Conduct a self-assessment to identify areas for improvement in personal leadership performance
	3.2	Produce a personal development plan to enhance leadership capabilities
	3.3	Apply continuous improvement techniques to track progress and adapt personal leadership strategies
	3.4	Reflect on feedback and performance data to make informed decisions for ongoing leadership development activities

Additional Information	
Unit purpose and aims	To enable learners to understand the characteristics of an effective leader and the importance of leadership agility and resilience. Learners will implement continuous personal development activities to enhance leadership performance and impact.
Details of the relationship between the unit and apprenticeship standards	**<u>Level 6 Business to Business Sales Professional Apprenticeship</u>** K2 Sales Planning S1 Working with Others S2 Consultative Selling S3 Pitching S5 Psychology of Sales B1 Ethics, Trust and Integrity B2 Management of Self B3 Interpersonal Skills
Location of the unit within the Ofqual subject/sector classification system	15.4 - Marketing and Sales

Indicative Content	
1.	• The key characteristics of an effective leader, e.g., clear communicator, collaborator, responsible, accountable, decisive, open to change, grit (Duckworth), role model etc. • The definition and significance of self-awareness in leadership • Emotional intelligence frameworks, theories and proposed components, e.g., mixed model, Goleman (1995), ability model Mayer-Salovey-Caruso (1990)

	• The role of emotional intelligence in developing leadership self-awareness • The benefits of self-awareness for leaders, e.g., improved decision-making, enhanced interpersonal relationships, increased adaptability etc. • The key characteristics of a self-aware leader, understanding of own strengths/development areas, open to feedback, aware of how emotions impact workplace decisions and behaviours, able to regulate emotions, growth mindset, adaptable leadership style, team orientated, humility, live by values, integrity, etc. • The key personality traits required for self-awareness, e.g., introspection, empathy, emotional regulation, authenticity etc. • The tools, techniques and models that help to develop self-awareness levels, e.g., Johari Window model (Luft and Ingham, 1955), Reflective Cycle (Gibbs, 1988), Experiential Learning Cycle (Kolb, 1970), Strength-Finder Framework (Gallop), VIA Strengths etc. • The role of feedback in enhancing self-awareness of leadership capabilities • Why it is important to assess the impact of self-awareness on personal and professional development • The correlation between self-awareness and leadership effectiveness • How leadership impacts on team dynamics, communication, conflict resolution etc. • How self-awareness can influence decision-making, e.g., cognitive biases (Kahneman, 2011) • The role of self-awareness in ethical decision-making • The influence of leadership styles on trust-building, transparency, and authenticity in colleague relationships
2.	• The definition of leadership agility • The VUCA (Volatile, Uncertain, Complex, Ambiguous) framework and its implications for leadership • The importance of flexibility, adaptability, and responsiveness in leadership to respond to the dynamic organisational environment • The range of theories of leadership resilience, e.g., individual-focused theories (dispositional, cognitive, Masten's Ordinary Magic model), dynamic systems theories (Garmezy's Person in Context, Cicchetti & Rogosch's Transactional Model), positive psychology theories (Seligman's Learned Optimism Theory, Seligman's 3Ps model) etc. • The characteristics of resilient leaders, e.g., perseverance, optimism, stress management etc.

	• How individual leaders respond to disruptions and challenges in life, e.g., the Resilience Framework (Richardson, 2002) • The importance of a growth mindset (Dweck, 2006) in building resilience • The synergies and distinctions between agility and resilience, e.g., respond to VUCA environment, foster adaptability, contribute to organisational success and sustainability, proactivity versus reactivity etc. • The impact of leadership agility and resilience on employee wellbeing • The techniques that can help develop agility, e.g., scenario planning, continuous learning, adaptive leadership (Heifetz, 1994) etc. • The tools and techniques for building personal resilience, e.g., stress management techniques, time management tools, meditation, mindfulness, journalling, gratitude exercises, healthy habits (exercise, sleep, diet), social connections etc. • The organisational practices for fostering a culture of innovation and psychological safety, (Edmondson, Clarke)
3.	• The range of self-assessment tools available to support development, e.g., personal SWOT analysis, personality psychometrics, leadership styles assessments, strengths assessments, 360-degree feedback, gap analysis, values and interests' assessments, emotional intelligence assessments, aptitude tests etc. • How to identify strengths and areas for development based on self-assessment results and feedback discussions • How to set personal leadership goals based on self-assessment outcomes • The function of a personal development plan aimed at enhancing leadership capabilities • The elements of a personal development plan, e.g., objectives, action steps, timelines, resources etc. • How to align development goals with career aspirations and organisational needs • Ways to incorporate feedback into a personal development plan • The role of mentorship and coaching in personal development • Using continuous improvement techniques to track progress and adapt personal leadership strategies • The importance of monitoring progress towards set goals through regular self-reflection and feedback loops • How to adjust strategies based on performance metrics and changing circumstances • How to make informed decisions for ongoing leadership development based on feedback and performance data

	• The techniques for analysing feedback for constructive insights • How to use performance data to identify trends and patterns • How to implement changes to personal leadership practices based on reflective analysis

Assessor Guidance	
1.	Learners should critically evaluate the significance of self-awareness in leadership, incorporating at least three theoretical perspectives and at least five key characteristics of effective leadership based on research findings. They should assess at least three ways that self-awareness impacts the personal and professional aspects of a leaders' life. Learners should provide workplace examples to illustrate their points.
2.	Learners should evaluate the significance of leadership agility and resilience in organisations, referencing at least four relevant models/theories. They should analyse at least five core components of resilient leadership. Learners should critically evaluate the relationship between agility and resilience, exploring at least four strategies to enhance both traits in organisational settings.
3.	Learners should conduct a thorough self-assessment using a 360-assessment and at least two other tools to identify areas for improvement. They should produce a detailed personal development plan with at least five objectives. Learners should apply at least two continuous improvement techniques to track their progress and provide evidence of adapting at least two leadership strategies. Learners should reflect on feedback from at least two colleagues/team members, and at least two pieces of performance data, to make informed decisions for their ongoing leadership development activities.

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.

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.

<table>
<tr><td>Location of the unit within the Ofqual subject/sector classification system</td><td colspan="2">15.4 - Marketing and Sales</td></tr>
<tr><td colspan="3">Indicative Content</td></tr>
<tr><td>1.</td><td colspan="2">
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
</td></tr>
<tr><td>2.</td><td colspan="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
</td></tr>
</table>

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	**Level 5 Operations Manager Apprenticeship** 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		**<u>Level 5 Operations Manager Apprenticeship</u>** 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.