REC Level 2 NVQ Certificate in Recruitment Resourcing Syllabus

Candidates must achieve:all 9 Mandatory units, providing 22 credits & 6 credits from any combination of Optional units

The REC Level 2 NVQ Certificate in Resourcing has been developed to provide recruitment resourcers and potential recruitment resourcers, with an industry recognised competency qualification at level 2.

To achieve an NVQ, candidates must prove that they have the ability (competence) to carry out their role to the required standard. We developed the NVQs in conjunction with the CFA. The NVQ's will be assessed through demonstration and a portfolio of evidence that reflects the assessment criteria laid out below which in-turn will demonstrate the following learning outcomes:

1. Be able to administer tasks within the recruitment process
2. Be able to administer the selection process
3. Be able to ensure compliance with the recruitment process
4. Understand how to search for candidate information for recruitment purposes
5. Be able to search for candidate information for recruitment purposes
6. Understand the principles of Client Relationship Management (CRM) for recruitment purposes
7. Be able to administer a candidate database
8. Be able to store, retrieve and archive candidate information
9. Be able to use a CRM system to match candidates to meet client requirements
10. Understand the benefits and risks of using social media networking to conduct a candidate search

11. Understand how social media networks are used
12. Be able to create a social networking profile
13. Be able to create a social media group or network to attract candidates
14. Be able to support the client to meet their recruitment needs
15. Be able to contribute to the overall development of a recruitment resourcing plan
16. Know how to identify clients' recruitment requirements
17. Be able to establish role requirements
18. Support candidates
19. Be able to pre-select candidates
20. Exchange feedback with candidates
21. Be able to build long term relationships with candidates
22. Be able to maintain on-going and post-placement relationships
23. Understand the principles of effective team working
24. Be able to maintain effective working relationships with colleagues
25. Be able to collaborate with colleagues to resolve problems
26. Understand the management of diary systems
27. Be able to manage diary systems
28. Understand how to make telephone calls to customers
29. Be able to plan telephone calls to customers
30. Be able to make telephone calls to customers
31. Understand how to exceed customer expectations
32. Be able to exceed customer expectations
33. Understand the delivery of customer service to challenging customers
34. Be able to deal with challenging customers
35. Understand customer service delivery
36. Be able to maintain on-going and post-placement relationships
37. Be able to prepare to deal with customers
38. Be able to provide customer service
39. Be able to support improvements to customer service delivery
40. Understand the resolution of customer service problems
41. Be able to resolve customer service problems
42. Be able to manage unresolved customer service problems
43. Be able to manage personal performance
44. Be able to manage their own time and workload
45. Be able to identify their own development needs
46. Be able to fulfil a personal development plan
47. Understand how to sell to customers face to face
48. Be able to maintain on-going and post-placement relationships
49. Be able to conduct a face to face sales meeting with the customer
50. Be able to deal with sales objections during face to face sales situations
51. Be able to close the sale
52. Understand how to prepare and deliver a sales demonstration
53. Be able to prepare for a sales demonstration
54. Be able to deliver a sales demonstration
55. Be able to evaluate the sales demonstration
56. Understand the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads
57. Understand the process of generating and qualifying sales leads
58. Be able to prospect for customers

Supporting the recruitment processes
RPC1

Level	**2**
Credit Value	**3**
GLH	**11**

Unit aims

This unit concerns administering the recruitment process, the selection process and the appointment process.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Be able to administer tasks that contribute towards the recruitment process
2. Be able to administer the selection process
3. Be able to ensure compliance with the recruitment process

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Be able to administer tasks that contribute towards the recruitment process

1.1 Take action to ensure that current and up-to-date job descriptions and person specifications are available for the roles being recruited
1.2 Confirm that terms of business have been agreed and issued
1.3 Record and monitor client and candidate communication
1.4 Place advertisements in the chosen media and locations in accordance with the candidate attraction plan
1.5 Make effective use of internet and social media recruitment in accordance with the candidate attraction plan
1.6 Manage responses in accordance with the candidate attraction plan
1.7 Explain organisational procedures for the recruitment of personnel

2. Be able to administer the selection process

2.1 Make arrangements for assessment events in accordance with the resourcing plan
2.2 Invite shortlisted candidates to attend assessment events in accordance with organisational procedures
2.3 Arrange for tests to be administered in accordance with the resourcing plan
2.4 Manage the administration of the assessment event in accordance with organisational procedures
2.5 Arrange for financial actions, within limit of own authority, to be carried out in accordance with organisational procedures

3. Be able to ensure compliance with the recruitment process

3.1 Confirm that terms and conditions have been provided to the candidate
3.2 Carry out the agreed pre-employment checks in accordance with organisational standards and procedures
3.3 Communicate offers in accordance with organisational standards and procedures
3.4 Keep databases up to date and maintain the requirements of confidentiality

Researching candidates for recruitment purposes
RPC2

Level	**2**
Credit Value	**2**
GLH	**11**

Unit aims

This unit concerns searching for candidate information for recruitment purposes

Learning outcomes

On successful completion of this unit the learner will be able to:

1. Understand how to search for candidate information for recruitment purposes
2. Be able to search for candidate information for recruitment purposes

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand how to search for candidate information for recruitment purposes

1.1 Explain the importance of agreeing aims, objectives and deadlines when researching candidate information
1.2 Explain the advantages and disadvantages of Boolean searching
1.3 Describe techniques used to search for candidate information
1.4 Describe sources of candidate information for recruitment purposes
1.5 Explain the purpose of recording and storing the search results

2. Be able to search for candidate information for recruitment purposes

2.1 Agree aims, objectives and deadlines for the information search
2.2 Carry out a search of identified sources of information for candidates within agreed deadlines
2.3 Ensure that any candidates found meet the agreed client requirements
2.4 Record the search results in accordance with organisational policies

Using Client Relationship Management systems for recruitment purposes
RPC3

Level	**2**
Credit Value	**3**
GLH	**14**

Unit aims

This unit concerns supporting the use of customer relationship management (CRM) for recruitment purposes

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the principles of Client Relationship Management (CRM) for recruitment purposes
2. Be able to administer a candidate database
3. Be able to store, retrieve and archive candidate information
4. Be able to use a CRM system to match candidates to meet client requirements

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand the principles of Client Relationship Management (CRM) for recruitment purposes

1.1 Describe how CRM systems can be used for recruitment purposes
1.2 Describe the features of a CRM system
1.3 Explain the importance of maintaining the currency, security and sufficiency of information contained within a CRM system

2. Be able to administer a candidate database

2.1 Take action to ensure the candidates listed on the candidate database meet the agreed criteria of the client
2.2 Ensure that there is sufficient information about candidates to enable matching to take place
2.3 Keep the candidate database up to date

3. Be able to store, retrieve and archive candidate information

3.1 Store candidate information in approved locations in accordance with organisational procedures
3.2 Retrieve any requested candidate information within the agreed timescale
3.3 Archive candidate information in accordance with organisational procedures within the agreed timescale
3.4 Keep archived candidate information up to date and indexed
3.5 Adhere to legal and ethical requirements

4. Be able to use a CRM system to match candidates to meet client requirements

4.1 Identify suitable job opportunities that meet candidates' expectations
4.2 Identify potential candidates that meet client requirements
4.3 Prepare information to enable the promotion of suitable candidates to clients and suitable clients to candidates
4.4 Follow organisational procedures to confirm that candidates have a 'right to work' in the UK
4.5 Present the information in a format that clearly shows the nature and results of the selection assessment Recruitment-specific competence units v5 7
4.6 Ensure all activities are undertaken in line with legal and ethical practice

Researching candidates through social media networking
RPC4

Level	**2**
Credit Value	**4**
GLH	**17**

Unit aims

This unit concerns developing and maintaining a candidate database, matching candidates and presenting candidates to clients

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the benefits and risks of using social media networking to conduct a candidate search
2. Understand how social media networks are used
3. Be able to create a social networking profile
4. Be able to create a social media group or network to attract candidates

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand the benefits and risks of using social media networking to conduct a candidate search

1.1 Describe the use of social media networking to conduct candidate research
1.2 Describe the benefits of using social media networking to conduct a candidate search
1.3 Describe the risks of using social media networking when conducting a candidate search
1.4 Identify the guidelines and ethical considerations concerning the use of social media networks

2. Understand how social media networks are used

2.1 Identify social networking sites used by the organisation
2.2 Describe what is meant by an online identity
2.3 Explain the advantages and disadvantages of using social networks to research candidates

3. Be able to create a social networking profile

3.1 Use a social media application template to create a profile for a product or service
3.2 Choose secure passwords for social media accounts
3.3 Set appropriate privacy levels for social media accounts
3.4 Upload digital media content to a social media site to promote a product or service
3.5 Add contacts to a social media profile

4. Be able to create a social media group or network to attract candidates

4.1 Send messages to others using social media to attract candidates
4.2 Create a group on a social media site to share information to attract candidates
4.3 Post comments on a social network to attract candidates
4.4 Adhere to organisational policies and procedures, legal and ethical requirements

Contributing to the development of a recruitment resourcing plan
RPC 5

Level	**2**
Credit Value	**2**
GLH	**8**

Unit aims

This unit is about the contribution made by the learner to assist the Recruitment Consultant to agree with clients how recruitment needs will be met and the development of a recruitment resourcing plan.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Be able to support the client to meet their recruitment needs
2. Be able to contribute to the overall development of a recruitment resourcing plan

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Be able to support the client to meet their recruitment needs

1.1 Explain the role of the client in the development of a recruitment resourcing plan
1.2 Identify the client's recruitment and selection preferences and/or processes
1.3 Explain the importance of selecting the best method(s) of recruitment and selection for a range of roles
1.4 Describe potential adverse effects associated with particular recruitment methods
1.5 Ensure all recruitment policies, materials and processes are in line with organisational policy and procedures

2. Be able to contribute to the overall development of a recruitment resourcing plan

2.1 Describe the components of a recruitment resourcing plan
2.2 Ensure the plan specifies the client's chosen recruitment and selection method(s) and is achievable within the agreed budget and timescale
2.3 Ensure the resourcing plan meets legal and ethical requirements

Identifying client recruitment requirements
RPC 6

Level	**2**
Credit Value	**2**
GLH	**12**

Unit aims

This unit is about the contribution made by the learner to assist the Recruitment Consultant to confirm clients' staffing requirements, analyse the role requirements of staff sought and confirm recruitment arrangements with clients.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Know how to identify clients' recruitment requirements
2. Be able to establish role requirements
3. Support candidates

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Know how to identify clients' recruitment requirements

1.1 Describe the methods used to identify clients' recruitment requirements
1.2 Identify the types of experience, skills, qualifications and attributes that may be required by a client for a particular sector
1.3 Define the different contractual terms for staff that may be required by a client

2. Be able to establish role requirements

2.1 Establish the requirements of the roles using valid sources of information
2.2 Record role profiles, job descriptions, person specifications and/or vacancy details in the agreed format(s)
2.3 Explain the distinctions between job descriptions and person specifications and the information needed for each

3. Be able to provide information to confirm recruitment arrangements with clients

3.1 Provide information on the services to be offered
3.2 Provide information on the terms of business and timescales

Pre-selecting candidates
RPC 7

Level	**2**
Credit Value	**2**
GLH	**5**

Unit aims

This unit is about the contribution made by the learner to assist the Recruitment Consultant to shortlist candidates and present pre-selected candidates to clients

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Be able to pre-select candidates
2. Exchange feedback with candidates

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Be able to pre-select candidates

1.1 Identify the criteria against which the candidates will be assessed
1.2 Assess candidates against the agreed criteria
1.3 Record the suitability and availability of those pre-selected
1.4 Record prospects who do not meet the criteria but who may be possible alternatives for other jobs
1.5 Inform those who are not pre-selected of the outcome in accordance with organisational standards and procedures
1.6 Ensure all pre-selection processes meet legal and ethical requirements

2. Be able to present pre-selected candidates

2.1 Present pre-selected candidates in the agreed format and timescale
2.2 Explain how the pre-selected candidates meet the client's staffing requirements

Building and maintaining relationships with candidates RPC 8

Level	**2**
Credit Value	**2**
GLH	**5**

Unit aims

This unit concerns the building and maintaining long-term, on-going and post-placement relationships with candidates

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Be able to build long term relationships with candidates
2. Be able to maintain on-going and post-placement relationships

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Be able to build long term relationships with candidates

1.1 Identify candidates' needs, wants and expectations
1.2 Respond to candidates' requests and need for information in line with organisational requirements
1.3 Inform candidates of the progress of any application and the need to involve other colleagues
1.4 Confirm that candidates' expectations have been met in line with any service offer
1.5 Maintain the security of candidates' personal information

2. Be able to maintain on-going and post-placement relationships

2.1 Identify new ways of helping candidates based on their feedback
2.2 Identify added value that the organisation could offer candidates to create loyalty
2.3 Bring to candidates' attention any services that may interest them
2.4 Share feedback from candidates with stakeholders
2.5 Review candidates' experiences as a means of improving the recruitment process

Develop working relationships with colleagues
ML 2

Level	**2**
Credit Value	**3**
GLH	**19**

Unit aims

The aim of this unit is to provide learners with an understanding of the principles of effective team working and the ability to maintain effective working relationships with colleagues and to collaborate with colleagues to resolve problems.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the principles of effective team working
2. Be able to maintain effective working relationships with colleagues
3. Be able to collaborate with colleagues to resolve problems

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand the principles of effective team working

1.1 Outline the benefits of effective team working
1.2 Describe how to give feedback constructively
1.3 Explain conflict management techniques that may be used to resolve team conflicts
1.4 Explain the importance of giving team members the opportunity to discuss work progress and any issues arising
1.5 Explain the importance of warning colleagues of problems and changes that may affect them

2. Be able to maintain effective working relationships with colleagues

2.1 Recognise the contribution of colleagues to the achievement of team objectives
2.2 Treat colleagues with respect, fairness and courtesy
2.3 Fulfil agreements made with colleagues
2.4 Provide support and constructive feedback to colleagues

3. Be able to collaborate with colleagues to resolve problems

3.1 Take others' viewpoints into account when making decisions
3.2 Take ownership of problems within own level of authority
3.3 Take action to minimise disruption to business activities within their own level of authority
3.4 Resolve problems within their own level of authority and agreed contribution

Manage diary systems
BA 13

Level	**2**
Credit Value	**2**
GLH	**12**

Unit aims

The aim of this unit is to provide learners with an understanding of the management of diary systems and the ability to carry out this activity.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the management of diary systems
2. Be able to manage diary systems

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand the management of diary systems

1.1 Explain the importance of keeping diary systems up to date
1.2 Describe the basis on which bookings and changes are prioritised
1.3 Explain any constraints relating to making bookings for people or facilities
1.4 Describe the types of problems that can occur when managing diaries

2. Be able to manage diary systems

2.1 Obtain the information needed to make diary entries
2.2 Make accurate and timely diary entries
2.3 Respond to changes in a way that balances and meets the needs of those involved
2.4 Communicate up-to-date information to everyone involved
2.5 Keep diaries up-to-date
2.6 Maintain the requirements of confidentiality

Make telephone calls to customers
CS 11

Level	**2**
Credit Value	**3**
GLH	**16**

Unit aims

The aim of this unit is to provide learners with an understanding of how to plan and make telephone calls to customers.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand how to make telephone calls to customers
2. Be able to plan telephone calls to customers
3. Be able to make telephone calls to customers

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand how to make telephone calls to customers

1.1 Explain the legislation and regulations relating to the use of customer information when planning to make calls
1.2 Explain the importance of keeping customer information up to date
1.3 Explain the reasons for organisational guidance on dealing with telephone calls
1.4 Explain the reasons for organisational identity checking processes
1.5 Explain how body language and facial expressions can be detected over the telephone
1.6 Describe different questioning techniques when dealing with customers
1.7 Explain organisational guidelines for what can and cannot be said or promised
1.8 Explain how to handle abusive calls from customers

2. Be able to plan telephone calls to customers

2.1 Identify the objective(s) of calls
2.2 Prepare the information needed to make calls
2.3 Plan the structure of calls
2.4 Identify customers' likely responses and how they can be dealt with

3. Be able to make telephone calls to customers

3.1 Use telecommunications equipment in accordance with organisational standards
3.2 Confirm the identity of customers in line with organisational guidelines
3.3 Make the customer aware of the purpose of the call as early as possible
3.4 Speak clearly, concisely and politely, using speech and tone to create rapport
3.5 Adapt their own communication style to meet customers' needs
3.6 Listen actively to what customers are saying to collect as much information as possible
3.7 Give clear and concise information that meets customers' needs
3.8 Record information in line with organisational guidelines
3.9 Complete agreed follow up actions after closing the telephone call

Exceed customer expectations
CS 14

Level	**2**
Credit Value	**3**
GLH	**15**

Unit aims

The aim of this unit is to provide learners with an understanding of how to exceed customer expectations and apply this understanding to exceed customer expectations.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand how to exceed customer expectations
2. Be able to exceed customer expectations

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand how to exceed customer expectations

1.1 Explain how customers form expectations of the service they will receive
1.2 Explain legislation, organisational policies and procedures that can limit or vary the service offer
1.3 Explain the types of actions that customers are likely to perceive as adding value
1.4 Explain how to recognise when actions taken to offer added value could be built into the service offer

2. Be able to exceed customer expectations

2.1 Identify differences between customers' expectations and needs and the service offer
2.2 Explain the service offer clearly and concisely to customers
2.3 Identify options that offer added value without affecting other customers adversely
2.4 Make offers to customers within their own authority levels
2.5 Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer
2.6 Record agreements made and actions taken

Deliver customer service to challenging customers
CS 18

Level	**2**
Credit Value	**3**
GLH	**16**

Unit aims

The aim of this unit is to provide learners with an understanding of the delivery of customer service to challenging customers and then to apply this learning to deal with challenging customers.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the delivery of customer service to challenging customers
2. Be able to deal with challenging customers

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand the delivery of customer service to challenging customers

1.1 Describe different types of challenging customers in the customer service environment
1.2 Explain an organisation's procedures and standards of behaviour for dealing with challenging customers
1.3 Explain behaviours that make it challenging to deal with customers
1.4 Explain the difference between assertive and aggressive behaviour
1.5 Describe techniques to deal with customers' challenging behaviour
1.6 Explain their own levels of authority for agreeing actions outside the service offer
1.7 Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters

2. Be able to deal with challenging customers

2.1 Identify the signs that indicate that a customer is challenging
2.2 Express understanding of customers' point of view without admitting liability
2.3 Explain to customers the limits of the service they can offer
2.4 Explain to customers the reasons for an organisation's position and policy
2.5 Agree a way forward that balances customer satisfaction and organisational needs
2.6 Obtain help from colleagues when options for action are beyond their level of authority
2.7 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers

Deliver customer service
CS 7

Level	**2**
Credit Value	**5**
GLH	**27**

Unit aims

The aim of this unit is to provide learners with an understanding of customer service delivery and the relationship between customer service and a brand. It will also provide learners with an ability to prepare to deal with customers, to provide customer service and support improvements to customer service delivery.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand customer service delivery
2. Be able to maintain on-going and post-placement relationships
3. Be able to prepare to deal with customers
4. Be able to provide customer service
5. Be able to support improvements to customer service delivery

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand customer service delivery

1.1 Explain the relationship between customers' needs and expectations and customer satisfaction
1.2 Describe the features and benefits of an organisation's products and/or services
1.3 Explain the importance of treating customers as individuals
1.4 Explain the importance of balancing promises made to customers with the needs of an organisation
1.5 Explain when and to whom to escalate problems
1.6 Describe methods of measuring their own effectiveness in the delivery of customer service

2. Be able to maintain on-going and post-placement relationships

2.1 Explain the importance of a brand to an organisation
2.2 Explain how a brand affects an organisation's customer service offer
2.3 Explain the importance of using customer service language that supports a brand promise
2.4 Identify their own role in ensuring that a brand promise is delivered

3. Be able to prepare to deal with customers

3.1 Keep up to date with an organisation's products and/or services
3.2 Prepare resources that are necessary to deal with customers before starting work

4. Be able to provide customer service

4.1 Maintain organisational standards of presentation and behaviour when providing customer service
4.2 Adapt their own behaviour to meet customers' needs or expectations
4.3 Respond to customers' requests in line with organisational guidelines

4.4 Inform customers of the progress of their requests
4.5 Confirm that customers’ expectations have been met in line with the service offer
4.6 Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service

5. Be able to support improvements to customer service delivery

5.1 Identify ways that customer service could be improved for an organisation and individuals
5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery

Resolve customer service problems
CS 17

Level	**2**
Credit Value	**5**
GLH	**22**

Unit aims

The aim of this unit is to provide learners with an understanding of how of the resolution of customer service problems. It will also provide learners with an ability to resolve customer service problems and manage unresolved customer service problems.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the resolution of customer service problems
2. Be able to resolve customer service problems
3. Be able to manage unresolved customer service problems

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand the resolution of customer service problems

1.1 Describe an organisation's customer service and complaints procedures
1.2 Describe techniques to identify customer service problems and their causes
1.3 Describe techniques to deal with situations where customers become agitated or angry
1.4 Explain the limits of their own authority for resolving customers' problems and making promises
1.5 Explain the purpose of encouraging customers to provide feedback
1.6 Describe methods used to encourage customers to provide feedback

2. Be able to resolve customer service problems

2.1 Identify the nature and cause of customer service problems
2.2 Identify workable options for resolving problems within organisational guidelines
2.3 Use the most appropriate method of communication for dealing with customers
2.4 Agree with customers the option that best meets their needs and those of the organisation
2.5 Keep customers informed of progress
2.6 Fulfil promises made to customers during the resolution process
2.7 Share customer feedback with others to improve the resolution of customer service problems
2.8 Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems

3. Be able to manage unresolved customer service problems

3.1 Explain to customers the reasons why problems cannot be resolved
3.2 Refer customers to other sources of help if their problems cannot be resolved

Manage personal performance and development ML 1

Level	**2**
Credit Value	**4**
GLH	**18**

Unit aims

The aim of this unit is to provide learners with the ability to manage their personal performance, as well as their own time and workload. It also provides learners with the ability to identify their own development needs and fulfil a personal development plan.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Be able to manage personal performance
2. Be able to manage their own time and workload
3. Be able to identify their own development needs
4. Be able to fulfil a personal development plan

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Be able to manage personal performance

1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager
1.2 Agree criteria for measuring progress and achievement with line manager
1.3 Complete tasks to agreed timescales and quality standards
1.4 Report problems beyond their own level of competence and authority to the appropriate person
1.5 Take action needed to resolve any problems with personal performance

2. Be able to manage their own time and workload

2.1 Plan and manage workloads and priorities using time management tools and techniques
2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives
2.3 Explain the benefits of achieving an acceptable “work-life balance”

3. Be able to identify their own development needs

3.1 Identify organisational policies relating to personal development
3.2 Explain the need to maintain a positive attitude to feedback on performance
3.3 Explain the potential business benefits of personal development
3.4 Identify their own preferred learning style(s)
3.5 Identify their own development needs from analyses of the role, personal and team objectives
3.6 Use feedback from others to identify their own development needs
3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs

4. Be able to fulfil a personal development plan

4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
4.2 Make use of formal development opportunities that are consistent with business needs
4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives
4.4 Review progress against agreed objectives and amend plans accordingly
4.5 Share lessons learned with others using agreed communication methods

Selling face to face
SA203

Level	**2**
Credit Value	**5**
GLH	**33**

Unit aims

This unit aims to develop the knowledge and skills of selling to customers face to face, overcoming objections and closing the sale.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand how to sell to customers face to face
2. Be able to maintain on-going and post-placement relationships
3. Be able to conduct a face to face sales meeting with the customer
4. Be able to deal with sales objections during face to face sales situations
5. Be able to close the sale

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand how to sell to customers face to face

1.1 Explain the differences between proactive and reactive selling
1.2 Explain how techniques such as cross-selling, up-selling and the sale of add-ons can be applied when selling in face to face situations
1.3 Describe the types of listening and questioning techniques used for selling in face to face situations
1.4 Explain how to interpret non-verbal behaviour in face to face sales situations
1.5 State the differences between benefits and features
1.6 Describe the different methods used to sell benefits
1.7 Explain how to involve the prospect in reaching solutions to sales problems

2. Be able to prepare for the sale

2.1 Develop a structured sales plan for the meeting that makes effective use of the time available
2.2 Select resources to be used during contact with the customer that are consistent with the plan

3. Be able to conduct a face to face sales meeting with the customer

3.1 Follow organisational standards of personal presentation when meeting customers
3.2 Work within social and cultural constraints relating to the sector/industry and/or customer
3.3 Behave in a way that is likely to develop a rapport with the customer
3.4 Identify customer requirements through the use of questioning and active listening
3.5 Confirm customer requirements by summarising their buying needs and interests
3.6 Identify products and/or services which match the customer's needs and confirm with the customer that they are suitable
3.7 Communicate unique selling points to the customer
3.8 Provide the customer with opportunities to discuss and assess features and benefits of products and/or services
3.9 Interpret buying signals and act on them to progress the sale
3.10 Provide the customer with materials to support the promotion of products and/or services

4. Be able to deal with sales objections during face to face sales situations

4.1 Identify sales objections prior to dealing with the customer
4.2 Clarify objections and identify potential sales opportunities from them
4.3 Evaluate potential trade-offs that will be mutually beneficial to the customer and to the organisation
4.4 Record any area in which the product and/or service does not meet the customer's requirements
4.5 Resolve customer queries about the product and/or service
4.6 Reassure the customer and confirm their objections have been overcome

5. Be able to close the sale

5.1 Perform a trial close to establish whether or not further objections exist
5.2 Gain a commitment from the customer to close the sale
5.3 Complete the formalities of the sale following organisational procedures

Preparing and delivering a sales presentation SA208

Level	**2**
Credit Value	**3**
GLH	**20**

Unit aims

The aim of this unit is to prepare for and provide creative, professional and inspiring demonstrations of their organisation's products or services to customers.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand how to prepare and deliver a sales demonstration
2. Be able to prepare for a sales demonstration
3. Be able to deliver a sales demonstration
4. Be able to evaluate the sales demonstration

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand how to prepare and deliver a sales demonstration

1.1 Identify candidates' needs, wants and expectations
1.2 Respond to candidates' requests and need for information in line with organisational requirements
1.3 Inform candidates of the progress of any application and the need to involve other colleagues
1.4 Confirm that candidates' expectations have been met in line with any service offer
1.5 Maintain the security of candidates' personal information

2. Be able to prepare for a sales demonstration

2.1 Identify the sales targets for own area of responsibility
2.2 Identify customer needs and wants in relation to the products and/or services being demonstrated
2.3 Agree the objectives, length, content and method of the demonstration and who will be present
2.4 Identify resources for the demonstration and plan the demonstration in a structured way
2.5 Anticipate problems, constraints or objections that could be raised in response to the demonstration and prepare possible responses
2.6 Prepare supporting materials that are consistent with the demonstration

3. Be able to deliver a sales demonstration

3.1 Promote the features and benefits of the products and/or services
3.2 Deliver the demonstration in a style and manner that achieves the objectives and engages the audience
3.3 Provide the customer/audience with opportunities to ask questions and raise objections
3.4 Respond to questions and objections in a manner that is likely to further sales
3.5 Gain commitment to progress or close the sale

4. Be able to evaluate the sales demonstration

4.1 Evaluate the sales demonstration against agreed objectives
4.2 Provide feedback to colleagues to improve the planning of future demonstrations and/or to enhance products and/or services

Generating and qualifying sales leads
SA212

Level	**2**
Credit Value	**2**
GLH	**15**

Unit aims

This unit aims to provide the skills and knowledge needed to generate and qualify sales leads.

Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads
2. Understand the process of generating and qualifying sales leads
3. Be able to prospect for customers

Assessment of the learning outcomes will require a learner to demonstrate that they can:

1. Understand the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads

1.1 Describe the organisational practices for acquiring contact lists and databases
1.2 Describe the practices relating to the sharing of customer information across the organisation
1.3 Identify the legislation and regulation relating to generating and qualifying sales leads
1.4 Explain the ethical codes of conduct relating to the generating and qualifying of leads

2. Understand the process of generating and qualifying sales leads

2.1 Explain how customers are segmented
2.2 Explain why and when different methods of contacting a prospect should be used
2.3 Explain how to identify and access key decision makers
2.4 Explain the importance of establishing buying needs and the contact's attitude to buying
2.5 Explain how the information provided by customers is assessed for potential up selling and cross selling
2.6 Explain how to identify customers who have high order value potential or up selling and cross selling opportunities

3. Be able to prospect for customers

3.1 Identify the target market customers and prospects according to the agreed criteria
3.2 Source and gather market and prospect information according to the agreed criteria
3.3 Qualify the sales contact according to the agreed criteria
3.4 Record details of sales contact in accordance with organisational procedures