Sales Level 2

QCF Units of Assessment

Final NVQ Units

December 2010

Skills CFA
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Contents

Title	Time planning in sales
Skills CFA Unit No.	SAL2-1
WBA Unit No.	F/502/8559
Level	2
Credit Value	2
GLH	13

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to manage and prioritise time in a sales role	1.1 Explain the importance of time management and its impact on sales objectives 1.2 Describe how a sales team member uses and measures the use of time 1.3 Describe best practice time management techniques 1.4 Explain how to review the use of time spent on sales activities
2. Be able to plan own time in a sales role	2.1 Identify own long-term sales commitments and immediate goals 2.2 Identify work-related priorities 2.3 Identify the differences between tasks that are urgent and tasks that are important 2.4 Consolidate tasks to reduce workload and time wastage 2.5 Identify opportunities to gain support from others to complete work 2.6 Develop a time plan or weekly schedule, prioritising all tasks in order of relative importance and urgency
3. Be able to evaluate time planning in a sales role	3.1 Identify unnecessary tasks that are not directly related to own objectives 3.2 Use feedback from colleagues to identify strengths and weaknesses in the use of own time 3.3 Identify productive periods of time 3.4 Identify the opportunities for improving the use of time

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to develop knowledge, understanding and skills in planning and evaluating time management in a sales role.
Unit expiry date	31 December 2013

Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Complying with legal, regulatory and ethical requirements in a sales or marketing role	
Skills CFA Unit No.	SAL2-2	
WBA Unit No.	A/502/8561	
Level	2	
Credit Value	2	
GLH	13	
Learning Outcomes		**Assessment Criteria**
The learner will		The learner can
1. Understand the legal, regulatory and ethical requirements in a sales or marketing role		1.1 Explain the legal requirements of a sales or marketing role 1.2 Explain the regulatory requirements of a sales or marketing role 1.3 Explain the ethical requirements of a sales or marketing role 1.4 State organisational procedures for raising legal, regulatory and ethical concerns relating to a sales or marketing role 1.5 Identify to whom non-compliance issues should be referred 1.6 Explain when and how to refer legal, regulatory and ethical concerns to others 1.7 Describe the possible consequence of non-compliance with legal, regulatory or ethical requirements
2. Be able to comply with organisational policies and procedures for legal, regulatory and ethical requirements in a sales or marketing role		2.1 Behave in a way that meets organisational ethical procedures, policies and standards 2.2 Identify areas where legal, regulatory or ethical issues may arise 2.3 Obtain advice on matters where legal, regulatory or ethical issues might exist 2.4 Work within the limits of responsibility and authority in a sales or marketing role 2.5 Report issues, problems and actions relating to legal, regulatory or ethical matters in the agreed format

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to support learners in understanding and adhering to organisational legal, regulatory and ethical requirements.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Selling face to face	
Skills CFA Unit No.	SAL2-3	
WBA Unit No.	L/502/8564	
Level	2	
Credit Value	4	
GLH	25	
Learning Outcomes		**Assessment Criteria**
The learner will		The learner 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
Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to develop the knowledge and skills of selling to customers face to face, overcoming objections and closing the sale.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the	15. Business, Administration and Law

subject/sector classification system	15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Selling by telephone (inbound)	
Skills CFA Unit No.	SAL2-4	
WBA Unit No.	J/502/8577	
Level	2	
Credit Value	4	
GLH	27	
Learning Outcomes		**Assessment Criteria**
The learner will		The learner can
1. Understand how to sell by telephone (inbound)		1.1 Describe the advantages and disadvantages of selling by inbound telephone sales calls 1.2 Describe when the following techniques can be applied when selling by inbound telephone sales calls: cross-selling, up-selling and selling add-ons 1.3 Describe the listening and questioning techniques used for selling during inbound telephone sales calls 1.4 Describe the different methods used to sell benefits during inbound telephone sales calls
2. Understand how to close the sale during inbound telephone sales calls		2.1 Explain how to manage customer behaviour during inbound telephone sales calls 2.2 Describe methods for closing sales during inbound telephone sales calls 2.3 Explain how to evaluate and measure the success of inbound telephone sales calls 2.4 Describe interactive ICT options available to support telephone sales activities
3. Be able to prepare for the inbound telephone sales call		3.1 Identify objectives for selling products and/or services by inbound telephone sales calls 3.2 Organise materials for a call in accordance with the sales call plan
4. Be able to identify customer needs during inbound telephone sales calls		4.1 Greet and respond to callers in accordance with organisational procedures 4.2 Obtain information from customers about their needs 4.3 Assess the potential value of calls and customers 4.4 Identify products and/or services with

	features and functions that customers need or want 4.5 Identify opportunities for further sales and/or sales of other products and/or services
5. Be able to present products and/or services to the customer during inbound telephone sales calls	5.1 Explain the benefits and features of products and/or services offered 5.2 Interpret the customer's reaction and decide how to progress the sale
6. Be able to deal with sales objections during inbound telephone sales calls	6.1 Identify sales objections prior to dealing with the customer 6.2 Clarify objections and identify potential sales opportunities from them 6.3 Deal with customer queries and objections with clear and accurate responses 6.4 Resolve customer queries about the product and/or service 6.5 Reassure the customer to confirm their objections have been overcome 6.6 Develop a positive relationship with the customer and identify and pursue further customer contact
7. Be able to close the sale during inbound telephone sales calls	7.1 Perform a trial close to establish whether or not further objections exist 7.2 Gain commitment from the customer to close the sale 7.3 Complete the formalities of the sale following organisational procedures 7.4 Provide customer feedback and reaction to products and/or services to appropriate people in own organisation
Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the skills necessary for responding to inbound sales calls.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA

Availability for use	Shared
Unit available from	1 December 2010

Title	Selling by telephone (outbound)
Skills CFA Unit No.	SAL2-5
WBA Unit No.	J/502/8580
Level	2
Credit Value	4
GLH	27

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to sell by telephone (outbound)	1.1 Describe the advantages and disadvantages of selling by outbound telephone sales calls 1.2 Describe when the following techniques can be applied when selling by outbound telephone sales calls: cross-selling, up-selling and selling add-ons 1.3 Describe the listening and questioning techniques used for selling during outbound telephone sales calls 1.4 Describe the different methods used to sell benefits during outbound telephone sales calls
2. Understand how to close the sale during outbound telephone sales calls	2.1 Explain how to manage customer behaviour during outbound telephone sales calls 2.2 Describe methods for closing sales during outbound telephone sales calls 2.3 Explain how to evaluate and measure the success of outbound telephone sales calls 2.4 Describe interactive ICT options available to support telephone sales activities
3. Be able to prepare for the inbound telephone sales call	3.1. Identify objectives for selling products and/or services by outbound telephone sales calls 3.2. Use agreed call lists or leads to plan sales calls 3.3. Organise materials for the call in accordance with the sales call plan
4. Be able to identify customer needs during outbound telephone sales calls	4.1 Assess the potential value of calls and customers 4.2 Prioritise calls according to likely customer value and probability of closure 4.3 Obtain information from customers about

	their needs 4.4 Identify products and/or services with features and functions that customers need or want 4.5 Identify opportunities for further sales and/or sales of other products and/or services
5. Be able to present products and/or services to the customer during outbound telephone sales calls	5.1 Explain the benefits and features of products and or services offered 5.2 Interpret the customer's preferred solution and decide how to progress the sale
6. Be able to deal with sales objections during outbound telephone sales calls	6.1 Identify likely sales objections prior to dealing with the customer 6.2 Clarify objections and identify potential sales opportunities from them 6.3 Deal with customer queries and objections with clear and accurate responses 6.4 Resolve customer queries about the product and/or service 6.5 Reassure the customer to confirm their objections have been overcome 6.6 Develop a positive relationship with customers and identify and pursue further customer contact
7. Be able to close the sale during outbound telephone sales calls	7.1 Perform a trial close to establish whether or not further objections exist 7.2 Gain a commitment from the customer 7.3 Complete the formalities of the sale following organisational procedures 7.4 Provide customer feedback and reaction to products or services to appropriate people in own organisation
Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the skills necessary for conducting outbound sales calls.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the	15. Business, Administration and Law

subject/sector classification system	15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Inputting and accessing sales or marketing data in information systems	
Skills CFA Unit No.	SAL2-6	
WBA Unit No.	D/502/8584	
Level	2	
Credit Value	2	
GLH	15	
Learning Outcomes		**Assessment Criteria**
The learner will		The learner can
1. Understand how to input and access sales or marketing data in information systems		1.1 Explain the uses of IT in the sales or marketing function 1.2 Identify why information is needed for sales or marketing activities 1.3 Describe how sufficient, valid and reliable sources of sales or marketing information can be gathered 1.4 Explain the reasons for using an established data storage system 1.5 Describe the role, advantages and disadvantages of manual and computerised systems 1.6 Explain ways of classifying sales or marketing information and the protocol for data storage
2. Understand the use of sales or marketing information sources and systems		2.1 Explain methods of presenting sales or marketing information 2.2 Describe the features of software and hardware used to manage sales or marketing information 2.3 Describe how to plan and organise searches for sales or marketing information 2.4 Explain the implications of entering incorrect sales or marketing data 2.5 Explain why certain types of sales or marketing information are confidential 2.6 Explain the scope of own authority and responsibility when using sales or marketing information and databases 2.7 Explain the actions to be taken in the case of a breach of confidentiality

3. Be able to input and use databases to support sales or marketing activities	3.1 Gather sales or marketing information 3.2 Identify potential information sources that are likely to support planned sales or marketing activities 3.3 Follow organisational procedures to report concerns about security/confidentiality 3.4 Use sales information gathered to support specified sales or marketing activities 3.5 Input and update sales or marketing information on the database so that it can be accessed and used to support sales activities in the future
Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the skills and knowledge required to input and access sales or marketing data and information
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Processing sales orders
Skills CFA Unit No.	SAL2-7
WBA Unit No.	M/502/8587
Level	2
Credit Value	2
GLH	17

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to process and follow up sales orders	1.1 Explain the importance of sales order processing 1.2 Describe organisational processes for ordering products and/or services 1.3 Describe different sources of information used to check customer credit 1.4 Describe the different payment methods accepted by sales orientated organisations 1.5 Explain the role of the despatch function 1.6 Describe service standards relating to sales order completion 1.7 Explain the importance of storing information securely
2. Be able to process sales orders	2.1 Identify customer sales order requirements 2.2 Check that the credit status of the customer meets organisational standards 2.3 Confirm the availability of products and/or services to the customer 2.4 Ensure that information given to the customer about delivery, timing and price is accurate 2.5 Ensure that the sale is authorised following the organisation's procedures 2.6 Finalise the transaction in accordance with organisational procedures 2.7 Ensure that the customer is aware of the terms and conditions of sale 2.8 Ensure that the customer's requirements are communicated to those responsible for fulfilling sales orders 2.9 Identify who to go to when in need of support with sales order processing problems

3. Be able to follow up sales order processing	3.1. Keep the customer informed of the sales order progress and any problems with the sale order 3.2. Advise the customer of current discounts and special offers 3.3. Check all information is stored securely
Additional Information about the unit	
Unit purpose and aim(s)	The aim of this unit is to provide the skill and knowledge needed to process orders and payments.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Preparing and delivering a sales demonstration
Skills CFA Unit No.	SAL2-8
WBA Unit No.	T/502/8588
Level	2
Credit Value	3
GLH	20

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to prepare and deliver a sales demonstration	1.1 Explain how the demonstration will contribute to the achievement of business goals and objectives 1.2 Describe the features and benefits of the products and services being demonstrated 1.3 Explain how to provide demonstrations of products and services in a manner and style which is suitable to different audiences 1.4 Explain the importance of rehearsing demonstrations 1.5 Describe equipment and accommodation requirements of the demonstration
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
Additional Information about the unit	
Unit purpose and aim(s)	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.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Selling at exhibitions
Skills CFA Unit No.	SAL2-9
WBA Unit No.	J/502/8594
Level	2
Credit Value	5
GLH	28

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to assess the relevance of exhibitions for the organisation	1.1 Explain the purpose of exhibitions, trade fairs and conferences and how they produce sales opportunities 1.2 Identify which events are most appropriate to the industry/sector and organisation and explain why 1.3 Explain the importance of the sales event to achieving organisational plans and targets 1.4 Describe how to evaluate sales events and measure their overall success
2. Understand how to prepare for and sell at exhibitions	2.1 Describe how to prepare for exhibitions 2.2 Explain the advantages and disadvantages of different methods and processes for collecting and recording sales leads information 2.3 Explain the importance of following up leads after the event
3. Be able to prepare for an exhibition	3.1 Identify the targets for sales and potential sales during the exhibition or trade fair 3.2 Provide information about the event that is attractive to customers 3.3 Agree procedures for collecting names, addresses and business cards of potential customers attending the event 3.4 Identify the dress code for the event 3.5 Obtain up to date product literature and prices lists 3.6 Collect customer testimonials and case studies to support sales messages, for use at the event 3.7 Identify target prospects from exhibition delegate lists 3.8 Review other exhibitors before the event

	to determine whether own organisation's products or services complement or compete with other products or services 3.9 Identify areas of compatibility and joint opportunities for the sale of add-ons, up selling or cross selling with other exhibitors before the event
4. Be able to sell at an exhibition	4.1 Use verbal and non-verbal communication to attract and engage the target audience 4.2 Find quick ways to establish customers' needs and wants 4.3 Identify up-selling and cross-selling opportunities 4.4 Gain commitment for sales or follow-up meetings after the event 4.5 Make appointments for follow-up meetings, ensuring that the right people are available for that meeting
5. Be able to evaluate own performance at an exhibition	5.1 Evaluate the effectiveness of the organisation's, personal and team's sales approach at the event 5.2 Provide feedback to colleagues to improve the planning for future events and/or to enhance products and/or services

Additional Information about the unit	
Unit purpose and aim(s)	The aim of this unit is to develop knowledge, understanding and sales skills in selling at trade fairs and exhibitions.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 October 2010

Title	Monitoring sales deliveries
Skills CFA Unit No.	SAL2-10
WBA Unit No.	L/502/8595
Level	2
Credit Value	2
GLH	10

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to deal with sales delivery problems and queries	1.1 Explain how to deal with sales delivery problems and queries 1.2 Explain when to refer sales delivery problems and queries to someone with more authority 1.3 Describe own limits of responsibility and authority when dealing with sales delivery problems and queries
2. Understand how to maximise sales opportunities when dealing with sales deliveries and handovers	2.1 Explain how further sales opportunities can be identified and maximised 2.2 Identify the types of sales opportunities that may be identified at the point of handover 2.3 Explain how information on further sales opportunities should be used
3. Be able to progress delivery of the sales order	3.1 Ensure the information on the sales order form matches internal documentation 3.2 Confirm that products are available for despatch 3.3 Confirm that the products are ready for handover to the customer in accordance with the terms and conditions of sale and organisational policy 3.4 Make changes to the sales order if required, ensuring customer expectations are met 3.5 Prepare accurate and complete documentation and records for handover 3.6 Record information according to organisation's procedures

4. Be able to complete sales delivery procedures	4.1 Confirm that the products are handed over to the customer in accordance with the sales agreement and terms and conditions of sale 4.2 Confirm that the customer is satisfied with the products 4.3 Follow up further opportunities for up-selling, cross-selling and selling add-ons
Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills needed when preparing for despatch and delivery of products to customers.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Supporting customers in obtaining finance for purchases
Skills CFA Unit No.	SAL2-11
WBA Unit No.	Y/502/8597
Level	2
Credit Value	3
GLH	22

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand the conditions for obtaining finance for purchases	1.1 Describe the advantages and disadvantages of methods used for raising finance for purchases 1.2 Identify the organisation's preferred supplier of financial packages and associated arrangements 1.3 Identify additional financial services which are appropriate to sell to customers 1.4 Explain the types of terms and conditions that apply to different financial packages 1.5 Describe the levels of authority of those involved in assisting customers to obtain finance for purchases
2. Be able to recommend financial packages to customers for purchases	2.1 Calculate the amount needed by the customer in accordance with organisational procedures 2.2 Gather sufficient information to enable the application for finance to proceed 2.3 Confirm the suitability of the financial package as meeting the customer's needs 2.4 Inform the customer of the terms and conditions applicable to the financial package selected 2.5 Provide the customer with the opportunity to raise questions or concerns 2.6 Provide written proposals for a financial agreement
3. Be able to confirm customers' credit status	3.1 Carry out a credit check prior to confirming finance to the customer in accordance with organisational procedures 3.2 Communicate the outcome of credit searches and financial decisions to customers following organisatonal

	guidelines 3.3 Complete financial documentation in compliance with legal and regulatory requirements
Additional Information about the unit	
Unit purpose and aim(s)	The aim of this unit is to develop knowledge, understanding and skills in assisting customers to obtain finance to buy products and/or services.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Generating and qualifying sales leads	
Skills CFA Unit No.	SAL2-12	
WBA Unit No.	H/502/8599	
Level	2	
Credit Value	2	
GLH	15	

Learning Outcomes	**Assessment Criteria**
The learner will	The learner 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

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the skills and knowledge needed to generate and qualify sales leads
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Meeting customers' after sales needs
Skills CFA Unit No.	SAL2-13
WBA Unit No.	R/502/8601
Level	2
Credit Value	3
GLH	14

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Be able to investigate customer after sales needs	1.1 Establish the nature of customers' after sales needs 1.2 Communicate with customers in a way that conforms with quality and customer service standards at all times
2. Be able to handle customers' after sales needs	2.1 Deal with customers' after sales needs following organisational customer service standards and procedures 2.2 Balance customers' needs with those of the organisation 2.3 Explain when to refer to someone in authority if the problem cannot be resolved within the limits of own authority 2.4 Fulfil commitments made to customers in accordance with quality and customer service standards 2.5 Record commitments made to customers
3. Be able to review the after sales process	3.1 Obtain customers' comments on service reliability from customers 3.2 Analyse and report the findings to the relevant person in the organisation 3.3 Make recommendations for improvements to after sales service provision in the light of customer feedback

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge of how after-sales service is provided in a way that meets your customer's needs..
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or	Skills CFA

other appropriate body (if required)	
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Handling objections and closing sales
Skills CFA Unit No.	SAL2-14
WBA Unit No.	M/502/8606
Level	2
Credit Value	3
GLH	22

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to handle sales objections	1.1 Explain the difference between standard and non-standard sales objections 1.2 Explain how to clarify objections and identify potential sales opportunities from them 1.3 Describe how to use questioning techniques to explore and resolve customer issues 1.4 Explain how to empathise with and reassure the customer 1.5 Explain the difference between hypothetical and real objections 1.6 Explain how knowledge of products and services can be used to answer objections 1.7 Explain how competitor activity may affect the potential sale 1.8 Describe how industry/sector pricing structures may have an impact on sales objections 1.9 Explain the scope of authority and responsibility when dealing with objections 1.10 State who to go to when in need of support to overcome objections
2. Understand how to close the sale	2.1 Explain how to identify verbal and non-verbal buying signals as signs of whether to move towards closing the sale 2.2 Explain how to perform a trial close 2.3 Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale 2.4 Explain potential barriers to closing the sale 2.5 Explain a range of ways to close the sale

3. Be able to handle objections	3.1 Clarify the nature and extent of objections 3.2 Explain to the customer the concessions available within the scope of authority 3.3 Follow organisational procedures for dealing with objections 3.4 Promote the benefits of products and/or services to overcome objections 3.5 Use testimonials to overcome objections 3.6 Refer to those in authority when dealing with objections outside the scope of own authority
4. Be able to close the sale	4.1 Perform a trial close and ask for the order when objections have been met 4.2 Make use of add-on, up-selling or cross-selling opportunities 4.3 Follow organisational procedures for accepting confirmation of an order

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to develop knowledge and skills in handling and overcoming sales objections in order to be able to close the sale.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010