Sales Level 3

QCF Units of Assessment

Final NVQ Units

December 2010

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Contents

Title	Negotiating, handling objections and closing sales
Skills CFA Unit No.	SAL3-1
WBA Unit No.	F/502/8612
Level	3
Credit Value	4
GLH	22

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to handle objections and negotiate with the customer	1.1 Describe the scope of authority and responsibility when dealing with objections 1.2 Identify the resources available to counter the sales objections 1.3 Describe how to plan and prepare for negotiation 1.4 Describe how to use testimonials to progress a sale 1.5 Explain the advantages and disadvantages of different methods of closing a sale 1.6 Explain organisational procedures for documenting the negotiated sale
2. Be able to prepare for objections and negotiation with the customer	2.1 Identify possible sales objections and appropriate responses prior to dealing with the customer 2.2 Confirm authorisation to negotiate 2.3 Prepare a negotiation plan that is capable of providing a mutually acceptable outcome
3. Be able to handle objections	3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques 3.2 Identify and prioritise customers' concerns 3.3 Provide evidence to the customer of the strengths of the organisation's products or services 3.4 Confirm with the customer that the objection(s) have been overcome 3.5 Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals
4. Be able to negotiate with the customer	4.1 Carry out negotiations according to negotiation plan 4.2 Promote the benefits of what is being offered to the customer

	4.3 Explain to the customer when and why no further adjustment is possible 4.4 Obtain support to progress negotiation that is outside own level of authority
5. Be able to close the sale following negotiation	5.1 Apply a trial close in accordance with the negotiation plan 5.2 Respond to any further objections and concerns 5.3 Identify and make use of potential add-on, up-selling or cross-selling opportunities 5.4 Summarise agreements made in accordance with organisational procedures and close the sale
Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the skills to handle and overcome 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

Title	Obtaining and analysing sales-related information
Skills CFA Unit No.	SAL3-2
WBA Unit No.	R/502/8615
Level	3
Credit Value	4
GLH	24

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand the uses of sales-related information	1.1 Explain the importance of up-to-date information for sales planning purposes 1.2 Explain the benefits and risks of using a range of information sources to support sales activities 1.3 Explain the limitations of sales-related information 1.4 Explain the importance of reviewing sales data requirements for current and future use
2. Understand how to use tools and methods to analyse sales-related information	2.1 Explain the advantages and disadvantages of different systems to gather sales-related information 2.2 Explain how to use different software packages for analysing and presenting sales-related information
3. Be able to obtain sales-related information about customers, markets and competitors	3.1 Specify the information needed to develop an understanding of customers, competitors and markets 3.2 Identify sources that are capable of providing the required information about the organisation's markets, customers and competitors 3.3 Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation
4. Be able to use tools and methods to analyse sales-related information	4.1 Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information 4.2 Define the information needs of the target audience for different types of sales-related information 4.3 Use the analytical protocols that are appropriate to the selected tools and

	methods 4.4 Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information 4.5 Validate the reliability and validity of the findings of the analysis 4.6 Provide sales-related information to the target audience within the agreed timescale and budget
Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills needed to obtain and analyse information that helps to understand the markets for products and/or services and the volume, mix and value of the products or services sold.
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	Obtaining and Analysing Competitor Information
Skills CFA Unit No.	SAL3-3
WBA Unit No.	H/502/8618
Level	3
Credit Value	3
GLH	18

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to validate information about competitors	1.1 Explain how and where to source information about competitors 1.2 Explain how to validate sourced information about competitors against recognised criteria 1.3 Describe the advantages and disadvantages of qualitative and quantitative methods for collecting competitor information
2. Understand the uses of competitor information for sales-related activities	2.1 Explain the purpose of obtaining and analysing information about competitors 2.2 Explain organisational policy on the recording of competitor information 2.3 Identify criteria that can be used to compare organisations with their competitors 2.4 Explain how to assess the impact of competitor activity on organisations
3 Be able to use competitor information for sales-related activities	3.1 Obtain and record information about competitors in ways that allow analysis to be undertaken 3.2 Identify competitors' objectives 3.3 Identify the nature of potentially threatening competitor activity 3.4 Estimate the relative importance of competitor activity on profitability and market share growth 3.5 Review the impact of competitor activity on sales activities 3.6 Propose sales activities in response to competitors' activities

Additional Information about the unit	
Unit purpose and aim(s)	This unit is all about obtaining and analysing information to understand the impact of competitors on the organisation's sales activities.

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	Buyer behaviour in sales situations
Skills CFA Unit No.	SAL3-4
WBA Unit No.	K/502/8622
Level	3
Credit Value	3
GLH	27

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand the impact of different models of buyer behaviour on the sales cycle	1.1 Explain the consumer buying decision-making process 1.2 Explain how the consumer buying decision-making process affects the sales cycle 1.3 Describe the influences that affect the consumer decision-making process 1.4 Explain the organisational buying decision-making process 1.5 Explain how the organisational buying decision-making process affects the sales cycle 1.6 Describe the influences that affect the organisational buying decision-making process 1.7 Explain the impact of the different roles within the decision-making unit on the sales cycle
2. Be able to respond to the buyer at each stage of the decision making process	2.1 Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process 2.2 Respond to different decision-makers in a sales situation in a way that is appropriate to their role 2.3 Use objections as buying opportunities 2.4 Confirm solution(s) offered meet the needs and wants of decision-makers

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge, understanding and skill necessary to enable the sales person to respond to different members of the decision-making unit, whether in consumer markets or organisational markets.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational	Sales NOS (Skills CFA)

standards or other professional standards or curricula (if appropriate)	
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	Communicating using digital marketing/sales channels
Skills CFA Unit No.	SAL3-5
WBA Unit No.	T/502/8624
Level	3
Credit Value	4
GLH	26

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to plan the use of digital media for a specific message, audience and recipients	1.1 Explain the selection of the organisation's targeted customers 1.2 Describe expected target audience responses to different electronic media communication methods 1.3 Describe the characteristics, advantages and disadvantages of different software packages for presenting marketing information 1.4 Explain the requirements of using multiple digital marketing technologies
2. Be able to plan the use of digital media for a specific message, audience and recipients	2.1 Confirm the sales and marketing objectives for the digital communication, including response rates and sales generated return on investment 2.2 Identify the criteria to be used in selecting recipients in target audience 2.3 Source and acquire targeted lists and databases of recipients in accordance with the plan 2.4 Confirm the range of electronic media best suited to communicating to the target audience in line with the sales and marketing objectives 2.5 Agree with relevant people the marketing communications message designed to engage the customer and which is appropriate for the media selected
3. Be able to check the digital message can be accessed and/or delivered	3.1 Check any links, keywords, and supporting attachments allow access by recipients to further information 3.2 Identify any risks that the message might be labelled as 'spam' and take action to minimise such risks 3.3 Enable click-through tracking in digital messages in accordance with the plan 3.4 Send messages to targeted customers in

	accordance with the plan 3.5 Set up reporting system for 'undeliverables' in accordance with organisational procedures
4. Be able to monitor and evaluate the response to digital activity and take any corrective action	4.1 Record undelivered messages in accordance with reporting system 4.2 Identify repeat communications requirements in line with the sales and marketing objectives 4.3 Monitor and evaluate the responses to digital marketing against agreed criteria 4.4 Report the findings of the evaluation in accordance with organisational procedures
Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills needed to carry out digital marketing via multiple channels using digital media which are both media and technology independent. These can therefore include, for example, email, SMS (Short Message Service or text messaging), RSS (Rich Text Syndication/Real Simple Syndication) websites, blogs and user-generated content.
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	Pricing for sales promotions
Skills CFA Unit No.	SAL3-6
WBA Unit No.	L/502/8628
Level	3
Credit Value	5
GLH	34

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand price-based promotions	1.1 Describe the strengths and weaknesses of different types of price-based promotions, including incentives and discounts 1.2 Describe the different approaches used by competitors to respond to price changes and price-based promotions 1.3 Explain how to identify and use sales opportunities resulting from a price-based promotion for higher volume and value sales 1.4 Describe how to assess the organisational costs and benefits of price-based promotions 1.5 Identify legal and ethical issues relating to price-based promotions
2. Be able to justify price-based promotions as part of a promotional strategy	2.1 Identify situations where a price-based promotion is justified to meet sales targets 2.2 Calculate the affordability of a proposed price-based promotion and its effects on the achievement of sales volume and profitability targets 2.3 Identify how to gain internal support or guidance on implementing price-based promotions
3. Be able to develop and present proposals for price-based promotions	3.1 Identify risks in a price-based promotion 3.2 Identify contingencies appropriate to the risks identified 3.3 Prepare proposals to justify price-based promotions in accordance with organisational procedures 3.4 Present a proposal following organisational procedures
4. Understand how to evaluate price based promotions	4.1 Explain the importance of measuring the impact of price-based promotions on sales activities 4.2 Explain the importance of evaluating the likely impact of price-based promotions on

	future sales activities 4.3 Describe the methods and mechanisms for measuring the success of price-based promotions 4.4 Describe how monitoring information is used to inform the design of future promotions
5. Be able to implement and evaluate price-based promotions	5.1 Implement price-based promotions within the scope of own authority 5.2 Monitor customer and competitor reactions to a price-based promotion against agreed criteria 5.3 Evaluate the impact of the promotion on market conditions against agreed criteria 5.4 Identify how the outcomes of price-based promotions will be used to inform future promotions
Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills necessary for designing and implementing price promotions, incentives or discounts in line with organisational pricing policies.
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 presentation
Skills CFA Unit No.	SAL3-7
WBA Unit No.	L/502/8631
Level	3
Credit Value	4
GLH	28

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand the factors for consideration in the preparation of sales presentations	1.1 Explain the importance of presentations to the achievement of sales targets 1.2 Explain the difference between formal and informal presentations 1.3 Explain the importance of setting aims and objectives when preparing a presentation 1.4 Describe how customer characteristics and buying behaviours will influence a presentation 1.5 Identify who to go to for support relating to the presentation 1.6 Explain the legal, social and ethical constraints that need to be considered when designing and delivering sales presentations
2. Be able to prepare a sales presentation	2.1 Describe the needs of the customer or audience 2.2 Set objectives for the sales presentation ensuring they reflect the customers' or audience's needs and interests 2.3 Assess the suitability of the venue for the presentation, and review issues relating to its size, acoustics and layout 2.4 Identify and prepare resources for delivery of the presentation 2.5 Obtain promotional material that will enhance the presentation 2.6 Include the product/service benefits and/or unique selling propositions in the presentation 2.7 Structure the presentation in line with its objectives 2.8 Ensure the presentation complements any proposal already supplied to the customer 2.9 Ensure the presentation can be delivered within the agreed timescale

3. Understand how to deliver sales presentations	3.1 Describe how to use verbal and non verbal communications in presentations 3.2 Explain the importance of rehearsing a presentation 3.3 Describe techniques to capture and retain the audience's attention 3.4 Describe the organisational methods for reporting and recording the outcome of presentations
4. Be able to deliver a sales presentation	4.1 Use pitch, tone and pace of delivery to engage the audience 4.2 Deliver a presentation that captures and retains the audience's attention 4.3 Use visual aids and/or publicity materials to support the presentation 4.4 Provide the audience with opportunities to ask questions and raise objections 4.5 Respond to questions, concerns and objections from the customer or audience in a way that gives a positive image of the organisation and its products and/or services 4.6 Gain commitment to proceed with the sale 4.7 Evaluate the effectiveness of the presentation in the light of stakeholder feedback and subsequent sales related activities and outcomes

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the necessary skills for developing and delivering sales presentations.
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	Developing and implementing sales call plans
Skills CFA Unit No.	SAL3-8
WBA Unit No.	D/502/8634
Level	3
Credit Value	3
GLH	22

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Be able to develop a sales call plan	1.1 Identify customers and prospects to be contacted that meet the agreed criteria 1.2 Determine the time available to deal with prospective and/or existing customers 1.3 Prepare and assemble sales materials and sales perspectives that can be used during contact with customers or prospects 1.4 Identify sales targets based on access to customers and prospects
2. Be able to undertake a sales call	2.1 Identify the customer's or prospect's current situation, needs and wants in relation to products and/or services 2.2 Identify customer needs and wants 2.3 Establish the strength of the prospect and their level of interest 2.4 Identify competitors with whom the prospect or customer has connections 2.5 Promote the organisation's strengths 2.6 Use testimonials to highlight benefits and features of products and/or services 2.7 Explain to the customer how the products and/or services can solve customer problems and add value to the customer experience 2.8 Identify actions that need to be taken to progress, and close the sale 2.9 Identify ways of improving sales techniques through a review of the sales call

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills needed to develop and implement a sales call plan.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational	Sales NOS (Skills CFA)

standards or other professional standards or curricula (if appropriate)	
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	Assisting customers in obtaining finance for purchases
Skills CFA Unit No.	SAL3-9
WBA Unit No.	K/502/8636
Level	3
Credit Value	2
GLH	11

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand the conditions for obtaining finance for purchases	1.1 Identify the advantages and disadvantages of different methods used for raising finance for purchases 1.2 Identify the organisation's preferred supplier of financial packages 1.3 Identify the 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 1.6 Explain the organisation's legal procedures for completion of finance documentation
2. Be able to propose financial options to customers	2.1 Determine the customer's need for finance, the amount of borrowing required and any special requirements or constraints 2.2 Agree the preferred financial option with the customer 2.3 Gather sufficient information to enable the application for finance to proceed 2.4 Resolve shortfalls and inconsistencies in information supplied by the customer 2.5 Provide the customer with opportunities to ask questions and raise concerns
3. Be able to complete finance arrangements for purchases	3.1 Inform the customer of the terms and conditions of the financial arrangements 3.2 Provide written proposals for a finance agreement to the customer 3.3 Ensure all documentation is completed 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 sales 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	Assessing customers' credit status
Skills CFA Unit No.	SAL3-10
WBA Unit No.	T/502/8638
Level	3
Credit Value	4
GLH	26

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand how to assess customer credit status	1.1 Explain the purpose of assessing customers' credit status 1.2 Describe a range of internal and external checks that may be used to assess customer credit status 1.3 Explain how liquidity ratios are calculated and are used to assess customer credit status 1.4 Explain the importance of following organisational procedures when carrying out a credit status assessment
2. Be able to assess the credit status of customers	2.1 Identify the customers' requirements for sales and credit 2.2 Explain to the customer the process the organisation will use for approving credit and setting a credit limit 2.3 Gather sufficient financial information from the customer to support credit searches 2.4 Ensure the customer is financially secure by analysing their liquidity ratios 2.5 Confirm the creditworthiness of customers by conducting checks through banks, credit rating agencies or supplier references and internal colleagues 2.6 Complete a formal agreement with the customer in line with the organisational procedures if the credit searches have proved satisfactory 2.7 Explain to the customer if the credit searches have proved negative and offer cash trading only
3. Be able to monitor the credit status of customers	3.1 Monitor the customer's account regularly following the organisation's procedures 3.2 Liaise with the customer regarding any changes in credit limits and the status of their account in accordance with organisational procedures

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills needed to assess a customer's creditworthiness before allowing them to open an account and use credit limits offered by the organisation. Credit status is also assessed when a customer starts dealing in a new or different area of business.
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	Contributing to the development and launch of new products and/or services
Skills CFA Unit No.	SAL3-11
WBA Unit No.	A/502/8639
Level	3
Credit Value	4
GLH	26

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Understand the product development process	1.1 Describe the sales forecasting technique used by the organisation 1.2 Explain the market features and trends relating to products or services in the market 1.3 Explain the customer base for the proposed product in terms of their wants and needs
2. Be able to contribute to the product and/or service development and launch process	2.1 Consult with colleagues and selected customers about a new product or service strategy 2.2 Generate ideas and/or enhancements to others' ideas for new products or services that meet the development criteria 2.3 Screen new ideas in accordance with the organisation's guidelines, marketing objectives 2.4 Test the market for the proposed product and/or service in accordance with the development plan 2.5 Provide information about existing customers, their needs, wants and behaviours in accordance with the market analysis specification 2.6 Support the preparation of a business case for the launch of a new product and/or service in accordance with the development plan 2.7 Forecast sales to support business case preparation in accordance with the development plan 2.8 Prepare information for customers about the new product and/or service in accordance with the development plan 2.9 Use feedback from stakeholders to refine the new product and/or service

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills needed to contribute to the development of new 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	Leading a sales or marketing team
Skills CFA Unit No.	SAL3-12
WBA Unit No.	T/502/8641
Level	3
Credit Value	4
GLH	25

Learning Outcomes	**Assessment Criteria**
The learner will	The learner can
1. Be able to set targets for the sales or marketing team	1.1 Agree Specific, Measurable, Achievable, Realistic and Time-bound (SMART) targets for individuals and sales or marketing team performance 1.2 Agree personal objectives for individual members of the sales or marketing team
2. Be able to support the motivation of the sales or marketing team	2.1 Provide support to team members toward achieving targets and objectives 2.2 Give recognition to individuals' successes 2.3 Use individual rewards and incentives to maintain morale in a sales or marketing environment 2.4 Encourage team members to put forward ideas 2.5 Assist team members to overcome feelings of 'rejection' that are experienced as a result of a lack of success in sales or marketing endeavours
3. Be able to monitor and evaluate the progress of the sales or marketing team	3.1 Monitor activities and progress across the team in accordance with the sales or marketing plan 3.2 Monitor the achievements of individual and sales or marketing team targets in accordance with the sales or marketing plan 3.3 Monitor customer interaction with individual team members in accordance with the sales or marketing plan 3.4 Evaluate customer interaction with individual team members against agreed criteria 3.5 Monitor compliance with legal, regulatory and ethical requirements relating to sales or marketing team activities 3.6 Appraise the success of sales or marketing activities against agreed objectives and targets 3.7 Identify areas for improvement in sales or marketing activities

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the skills needed to lead a sales or marketing team
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	Managing the induction and probation of sales staff
Skills CFA Unit No.	SAL3-13
WBA Unit No.	F/502/8643
Level	3
Credit value	3
GLH	15

Learning Outcomes	Assessment Criteria
The learner will:	The learner can:
1 Understand the induction and probation processes for sales staff	1.1 Explain the purpose of induction and probation periods for sales staff 1.2 Describe organisational procedures for induction and probation for sales staff 1.3 Explain organisational employment policies and procedures including: • Induction and Probation • Employment Rights and Responsibilities • Timekeeping and Absence • Health and Safety 1.4 Explain the basis of the induction programme and its contribution to efficient sales performance 1.5 Describe how mentoring, coaching and buddying might be used to induct new sales staff 1.6 Describe the actions to be taken in the event of unsatisfactory performance by sales probationers
2 Be able to manage the induction and probation of new sales staff	2.1 Manage the induction and probation of new sales staff and their expectations in accordance with organisational procedures 2.2 Agree targets with new sales staff for probationary period 2.3 Use mentoring, coaching, or buddying systems in accordance with the induction programme 2.4 Review the progress of new sales staff at agreed intervals and identify areas for development 2.5 Provide feedback and support to new sales staff in accordance with identified developmental needs
Additional information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills involved in providing a satisfactory induction and probation for members of the sales team.
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