SKILLSFIRST

Handbook

RRNC2 – VTCT (Skillsfirst) Level 2 NVQ Certificate in Recruitment Resourcing (RQF)

601/3449/5

Version 4

About Skillsfirst

VTCT is a market-leading Awarding, Assessment and End-point Assessment (EPA) Organisation offering vocational and technical qualifications in a range of 'services to people' sectors.

The VTCT group of companies are comprised of three innovative awarding brands: VTCT, iTEC and Skillsfirst. Together they have over 2,500 approved centres in over 40 countries across the world.

The qualifications suite offered by VTCT (Skillsfirst) spans a range of sectors including Childcare, Business Services, Health & Social Care, Recruitment and Social Media.

For more information visit us at www.vtct.org.uk and www.skillsfirst.co.uk, contact our dedicated Customer Support Team via email at customersupport@vtct.org.uk and customerservices@skillsfirst.co.uk or call 0121 270 5100

Contents

1 Qualification at a glance

Qualification title	VTCT (Skillsfirst) Level 2 NVQ Certificate in Recruitment Resourcing (RQF)
Qualification number	601/3449/5
Product code	RRNC2
Age range	There are no age limits attached to learners undertaking this qualification unless this is a legal requirement of the process or the environment.
Credits	28
Total Qualification Time (TQT)	280
Guided Learning (GL) hours	134
Assessment	To be awarded this qualification, learners must successfully achieve the following assessments: • Portfolio of evidence • Skills-based assessment (if applicable)
Entry requirements	There are no formal entry requirements for learners undertaking this qualification; however centres must ensure that learners have the potential and opportunity to gain evidence for the qualification in the work place.
Support materials	Support materials can be found on the website (if applicable)

2 Qualification information

2.1 Qualification aim and design

This qualification has been designed for learners who work or want to work in recruitment. It allows learners to practise their skills and apply the knowledge required for career progression in the recruitment sector as recruitment consultants or resourcers. It is also flexible, allowing learners to choose units that best fit their needs, whilst at the same time ensuring that essential areas of knowledge and skill are covered.

The qualification covers the range of activities and processes carried out by trainee recruitment consultants and resourcers working within a recruitment business. These include supporting the recruitment processes, researching candidates through social media networking, using a Client Relationship Management (CRM) system for recruitment purposes, contributing to the development of a recruitment resourcing plan, pre-selecting candidates and developing working relationships with colleagues.

This qualification also serves as a core component of the Intermediate Level Apprenticeship in Recruitment Resourcing.

2.2 Progression opportunities

On completion of the Level 2 NVQ Certificate in Recruitment Resourcing (RQF), learners may progress into employment or onto the following Skillsfirst qualifications:

- Skillsfirst Level 2 Certificate in Recruitment Resourcing (RQF)
- Skillsfirst Level 3 Certificate in Principles of Recruitment Practice (RQF)
- Skillsfirst Level 3 NVQ Diploma in Recruitment (RQF)

or similar higher level qualifications

3 Qualification structure

To be awarded the VTCT (Skillsfirst) Level 2 NVQ Certificate in Recruitment Resourcing (RQF) learners must achieve all mandatory units. All 28 credits must be achieved, of which a minimum of 6 credits must be from optional units.

The minimum TQT required to achieve this qualification is **280.**

Product code	Unit title	Level	Credit	Unit reference number
Mandatory units (Group M): 22 credits				
RPC1	Support the recruitment processes	2	3	M/506/4361
RPC2	Researching candidates for recruitment purposes	2	2	K/506/4360
RPC3	Using Client Relationship Management systems for recruitment purposes	2	3	T/506/4359
RPC4	Researching candidates through social media networking	2	3	M/506/4358
RPC5	Contributing to the development of a recruitment resourcing plan	2	2	K/506/4357
RPC6	Identifying client recruitment requirements	2	2	H/506/4356
RPC7	Pre-selecting candidates	2	2	D/506/4355
RPC8	Building and maintaining relationships with candidates	2	2	Y/506/4354
ML2	Develop working relationships with colleagues	2	3	R/506/1789

Product code	Unit title	Level	Credit	Unit reference number
Optional units (Group O): A minimum of 6 credits				
BUS13	Manage diary systems	2	2	L/506/1807
CUS7	Deliver customer service	2	5	A/506/2130
CUS11	Make telephone calls to customers	2	3	K/506/2155
CUS14	Exceed customer expectations	2	3	Y/506/2135
CUS17	Resolve customer service problems	2	5	A/506/2158
CUS18	Deliver customer service to challenging customers	2	3	F/506/2159
ML1	Manage personal performance and development	2	4	L/506/1788
SA203	Selling face to face	2	4	L/502/8564
SA208	Preparing and delivering a sales demonstration	2	3	T/502/8588
SA212	Generating and qualifying sales leads	2	2	H/502/8599

4 Centre requirements

4.1 Resources

Centres must possess the physical resources needed to support the delivery of the programme and the assessment of knowledge and skills, which should therefore be of industry standard. Where specific resources are required these have been indicated in individual units.

4.2 SkillsCFA

The Level 2 NVQ Certificate in Recruitment Resourcing (RQF) is based on the units developed by SkillsCFA who are the sector skills council for recruitment. Their contact details are:

6 Graphite Square
Vauxhall Walk
London
SE11 5EE
Phone 020 7091 9620

info@skillscfa.uk.org

This handbook provides details from SkillsCFA's assessment strategy, which centres will need to apply in order to assess and quality assure the Level 2 NVQ Certificate in Recruitment Resourcing (RQF) and includes the:

- occupational expertise of those who assess performance, and moderate and verify assessments
- continuous professional development
- summary of assessment methods

The complete assessment strategy is available for view and to download from the e-skills website www.skillscfa.org

4.3 Occupational expertise of those who assess performance, and moderate and verify assessments

4.3.1 Deliverers, assessors, and moderators and internal verifiers (IVs)

Staff delivering these qualifications must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be technically competent in the areas for which they are delivering training and/or have experience of providing training. This knowledge must be at least to the same level as the training being delivered
- have recent relevant experience in the specific area they will be assessing

Assessors must be occupationally competent to make assessment judgments about the level and scope of individual learner skills and understanding in recruitment practice and, occupationally competent to make assessment judgments about the quality of assessment and the assessment process.

IVs must be occupationally competent to make recruitment moderation and verification judgments about the quality of assessment and the assessment process.

For assessors and IVs, this could be verified by:

- curriculum vitae and references
- possession of a relevant qualification
- corporate membership of a relevant professional institution

Assessors and IVs must have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

Centre staff may undertake more than one role, e.g. tutor and assessor or moderator/IV, but must never internally verify their own assessments.

4.4 Employer direct model

Where employers opt for an 'employer direct' model, the qualification requirements for assessors and IVs may be waived. The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of Skillsfirst may choose between:

- achieving the appropriate approved qualifications for assessment/verification

or

- demonstrating that their (the employer's) training and development activity undertaken to prepare, validate and review these assessment roles, maps 100% to the National Occupational Standards which these qualifications are based on. The mapping process must be agreed by Skillsfirst as providing the equivalent level of rigour and robustness as achievement of the approved assessment/verification qualification.

Each application to use the employer direct model will be considered on an individual organisation and qualification basis and agreed by the qualification regulators, including the sector skills council. Prospective organisations must be able to confirm that their in-house practices conform to the requirements of the standards in association with Skillsfirst

4.5 Continuous professional development (CPD)

Centres are responsible for ensuring that Deliverers, Assessors and IVs plan and maintain their CPD.

All deliverers, assessors and IVs must maintain current competence in recruitment practice to deliver these functions. This can be achieved in many ways, but must be recorded in individual continual professional development (CPD) records that are maintained by the centre. Centres are expected to support their Deliverers, Assessors and IVs in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

Centres may have generic criteria and personnel specifications in addition to the above.

4.6 Total Qualification Time (TQT)

Each qualification has a Total Qualification Time (TQT) value based on the total number of hours learning required to achieve it. The TQT value reflects the number of supervised learning hours required to achieve the knowledge and assessment requirements, plus the length of time a learner would need to take to achieve the skills and capabilities to be deemed competent. All RQF qualifications are subject to an evaluation process to determine their fitness-for-purpose.

5 Assessment

5.1 Summary of assessment methods

For this qualification, learners will be required to provide a portfolio of evidence for **each** unit.

5.2 Assessment principles

Units will be achieved through the acquisition of evidence by the learner and submission to their assessor. Units may be assessed through a number of different sources and forms, which must meet the requirements of assessment criteria.

- Assessment should normally be at the learner's workplace, but where the opportunity to assess across the range of standards is unavailable other comparable working environments may be used, following agreement from the external verifier.
- A holistic approach towards the collection of evidence should be encouraged, assessing activities generated by the whole work experience rather than focusing on specific tasks. e.g. If the learner communicates with a customer whilst engaged in sales activities these can be assessed against both sales and customer service elements.
- Assessors can only assess in their acknowledged area of occupational competence.
- Assessors and IVs will be registered with their centre and be accountable to the organisation for their assessment practice.
- Health and safety of customers/clients and employees must be maintained throughout the assessment process and if any person carrying out assessment or verification activities does not feel that there is due regard to health and safety then that person should refuse to continue with the activity(ies) until satisfied that due regard to health and safety is being taken.

5.3 Characteristics of assessment guidance

The learner may produce evidence from a range of examples which should be recorded in some form. A record of evidence will confirm to the assessor their confidence in the learner's breadth and depth of knowledge and understanding in being able to competently meet the functional requirements of all the units.

The assessor will need to be assured that the learner can:

- meet all the learning outcomes of a unit
- pass all the assessment criteria of a unit

An assessor may request additional evidence if they are not satisfied with the evidence presented by the learner. If this occurs, it may need to be agreed in partnership with the learner and the assessor.

5.3.1 Professional discussion

Professional discussion is encouraged as a supplementary form of evidence to confirm a learner's competence. Such discussions should not be based on a prescribed list of questions but be a structured discussion which enables the assessor to gather relevant evidence to ensure the learner has a firm understanding of the standard being assessed

5.4 Simulation and witness testimony

Simulation or witness testimony is warranted where the centre can demonstrate that performance evidence has been impossible to obtain in the work environment.

5.4.1 Simulation

Simulation must not be used, except in exceptional circumstances where natural work evidence is unlikely to occur. Agreement must be gained from Skillsfirst for the use of any simulation. If simulation is used, it should be used sparingly and should only form a small part of the evidence for the qualification.

5.4.2 Witness testimony

Skillsfirst recognise the use of witness testimony and expert witness testimony as appropriate methods for assessors to collect evidence on candidate's performance. Witness testimonies can be obtained from people that are occupationally competent and who may be familiar with the national occupational standards, such as the learner's line manager. They may also be obtained from people who are not occupationally competent and do not have a knowledge of the national occupational standards such as other people within the learner's workplace, customers and suppliers. The assessor must judge the validity of the witness testimony and these may vary depending on the source. Witness testimonies can only support the assessment process and may remove or reduce the need to collect supplementary evidence. However, centres must comply with Skillsfirst guidance over the occupational competence and briefing of witnesses in the use of witness testimony

5.5 Recognition of prior learning (RPL)

RPL is a method of assessment that considers whether a learner can demonstrate that they can meet the assessment requirements for a component of a qualification through knowledge, understanding or skills that they already possess and do not need to develop through a course of learning. Should any opportunities for RPL be identified, it is important that a complete process of recognising prior experience and learning is undertaken, by ensuring that:

- it covers relevant or appropriate experience for previous activities, as well as accredited learning and qualifications
- it is incorporated into the assessment planning, with details of how this will take place
- mapping of prior learning to the national occupational standards to identify gaps is
- documented and auditable
- assessment methods or processes for recognising prior experience and learning, are documented and made available to the external verifier
- the audit trail covers the whole process and methodology of RPL
- the authenticity and currency of presented evidence is established by the assessor

This evidence will need to be referenced clearly on recording documentation and will need to be appropriately authenticated and validated, perhaps by an employer or expert witness.

Assessment must be valid and reliable to ensure the integrity of the award. The evidence gathered must meet the standards of the qualification or component and the assessment process must be subject to the same quality assurance procedures as any other assessment process.

In summary, evidence submitted to the RPL process must:

- be authentic and prove conclusively that RPL is based on the learner's own work;
- meet the requirements of the current the skills and knowledge requirements and be
- appropriate to the content of the component or qualification being considered for RPL;
- be sufficient to conclusively prove consistency of learner performance in meeting the skills and knowledge requirements

6 Units

SKILLSFIRST

Unit Handbook

RPC1 – Support the recruitment processes

Unit reference number: M/506/4361

Level: 2 **Credit value: 3** **Guided Learning (GL) hours: 11**

Unit aim

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

Learning outcomes

There are three outcomes to this unit. The learner will:

LO1 Be able to administer tasks within the recruitment process

LO2 Be able to administer the selection process

LO3 Be able to ensure compliance with the recruitment process

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Job description – this is a list to show general tasks, or functions, and responsibilities of a position or work role. It may often include to whom the position reports.

Person specification – this outlines the type of person needed to meet the requirements of a job description. It might contain the educational qualifications, previous experience, general intelligence, specialised skills, interests, personality and physical requirements.

Terms of business – this defines what the recruitment consultancy will do for the client, fees for the service provided, refunds, transfer fees, etc.

Candidate attraction plan – an agreement with the client which confirms the tools and techniques that the recruitment consultancy will use to attract potential candidates to fill a vacancy.

Resourcing plan – this sets out the costs of the resources needed to attract potential candidates and to fill a vacancy/position.

Financial actions - may include, but are not limited to:
- arranging travel costs
- invoicing
- attendance expenses

Simulation is not allowed

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the national occupational standards:

CFAREC4 - Obtain, prepare and promote job vacancies

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to administer tasks within 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 information
	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

Learning Outcome	Assessment Criteria
LO2 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 assessment events in accordance with organisational procedures
	2.3 Arrange for any 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

Learning Outcome	Assessment Criteria
LO3 Be able to ensure compliance with the recruitment process	3.1 Confirm that the 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

RPC1 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

RPC2 – Researching candidates for recruitment purposes

Unit reference number: K/506/4360

Level: 2
Credit value: 2
Guided Learning (GL) hours: 11

Unit aim

This unit concerns searching for candidate information for recruitment purposes.

Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Understand how to search for candidate information for recruitment purposes

LO2 Be able to search for candidate information for recruitment purposes

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the national occupational standards:

CFAREC5 - Match job-seekers with suitable vacancies

Assessment guidance

Boolean searching – this is combining keywords with operators such as AND, NOT and OR to further produce more relevant results. For example, a Boolean job search could be "catering" AND "London". This would limit the search results to only those documents containing the two keywords.

Client requirements – this is the agreed job description and the person specification.

Simulation is not allowed

Learning outcomes

Learning Outcome	**Assessment Criteria**
LO1 Understand how to search for candidate information for recruitment purposes	1.1 Explain the importance of agreeing aims, objectives and deadlines when researching for 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

Learning Outcome	**Assessment Criteria**
LO2 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

RPC2 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

RPC3 – Using Client Relationship Management systems for recruitment purposes

Unit reference number: T/506/4359

Level: 2 **Credit value: 3** **Guided Learning (GL) hours: 14**

Unit aim

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

Learning outcomes

There are four outcomes to this unit. The learner will:

LO1 Understand the principles of Client Relationship Management (CRM) for recruitment purposes

LO2 Be able to administer a candidate database

LO3 Be able to store, retrieve and archive candidate information

LO4 Be able to use a CRM system to match candidates to meet client requirements

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

CRM system – this allows a recruitment consultancy to track each individual client and customer by a variety of information. This information may include, but is not limited to:

- their name and personal details
- their requirements and expectations
- where they are in the recruitment process
- any recent social media activity
- notes from previous calls and contacts
- records of email conversations

Right to work – candidates must prove that they have an ongoing right to work in the UK, or are eligible to have a right to work in the UK for up to 12 months (known as a 'limited right').

Simulation is not allowed

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the national occupational standards:

CFAREC5 - Match job-seekers with suitable vacancies

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

Learning Outcome	Assessment Criteria
LO4 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 details of the selection assessment
	4.6 Ensure all activities are undertaken in line with legal and ethical practice

RPC3 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

RPC4 – Researching candidates through social media networking

Unit reference number: M/506/4358

Level: 2
Credit value: 3
Guided Learning (GL) hours: 17

Unit aim

This unit will enable the learner to understand how social media can play its part in the carrying out of candidate research. It will also allow the learner to understand the social media applications that may be used for candidate research and how to make best use of them.

Learning outcomes

There are four outcomes to this unit. The learner will:

LO1 Understand the benefits and risks of using social media networking to conduct a candidate search

LO2 Understand how social media networks are used

LO3 Be able to create a social networking profile

LO4 Be able to create a social media group or network to attract candidates

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Social media networking - may include, but is not limited to:

- Linkedin
- Facebook
- Twitter
- Google plus

Digital media – may include, but are not limited to:

- images
- URLs

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the national occupational standards:

CFAREC5 - Match job-seekers with suitable vacancies

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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 a candidate research
	1.2 Describe the benefits and risks 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

Learning Outcome	Assessment Criteria
LO4 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 in a social media site to share information to attract candidates
	4.3 Post comments to a social network to attract candidates
	4.4 Adhere to organisational policies and procedures, legal and ethical requirements

RPC4 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

RPC5 – Contributing to the development of a recruitment resourcing plan

Unit reference number: K/506/4357

Level: 2
Credit value: 2
Guided Learning (GL) hours: 8

Unit aim

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

There are two outcomes to this unit. The learner will:

LO1 Be able to support the client to meet their recruitment needs

LO2 Be able to contribute to the overall development of a recruitment resourcing plan

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Potential adverse effect – this is a barrier that may make the recruitment of a candidate problematic, such as the vacancy being at a rival organisation to their current employment or references cannot be obtained.

Recruitment resourcing plan – this sets out the costs of the resources needed to attract potential candidates and to fill a vacancy/position.

Simulation is not allowed

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the national occupational standards:

CFAREC1 - Develop a resourcing strategy

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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 effect associated with particular recruitment methods
	1.5 Ensure all recruitment policies, materials and processes are in line with organisational policy and procedures

Learning Outcome	Assessment Criteria
LO2 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

RPC5 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

RPC6 – Identify client recruitment requirements

Unit reference number: H/506/4356

Level: 2
Credit value: 2
Guided Learning (GL) hours: 12

Unit aim

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

There are three outcomes to this unit. The learner will:

LO1 Know how to identify clients' recruitment requirements

LO2 Be able to establish role requirements

LO3 Be able to provide information to confirm recruitment arrangements with clients

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Clients' recruitment requirements - may include, but are not limited to:

- job specification
- person specification
- permanent
- temporary
- fixed
- part time

Job description – this is a list to show general tasks, or functions, and responsibilities of a position or work role. It may often include to whom the position reports.

Person specification – this outlines the type of person needed to meet the requirements of a job description. It might contain the educational qualifications, previous experience, general intelligence, specialised skills, interests, personality and physical requirements.

Simulation is not allowed

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the national occupational standards:

CFAREC2 - Contact hirers and establish recruitment

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

RPC6 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

RPC7 – Pre-selecting candidates

Unit reference number: D/506/4355

Level: 2 **Credit value: 2** **Guided Learning (GL) hours: 5**

Unit aim

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

There are two outcomes to this unit. The learner will:

LO1 Be able to pre-select candidates

LO2 Be able to present pre-selected candidates

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Simulation is not allowed

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the national occupational standards:

CfAREC4 - Obtain, prepare and promote job vacancies

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

RPC7 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

RPC8 – Building and maintaining relationships with candidates

Unit reference number: Y/506/4354

Level: 2
Credit value: 2
Guided Learning (GL) hours: 5

Unit aim

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

Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Be able to build long term relationships with candidates

LO2 Be able to maintain on-going and post-placement relationships

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Added value - may include, but is not limited to:

- CPD activities
- CV writing
- Career advice

Simulation is not allowed

Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the national occupational standards:

CFAREC3 - Attract and maintain relationships with job-seekers

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

RPC8 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

ML2 – Develop working relationships with colleagues

Unit reference number: R/506/1789

Level: 2 **Credit value: 3** **Guided Learning (GL) hours: 19**

Unit aim

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

There are three outcomes to this unit. The learner will:

LO1 Understand the principles of effective team working

LO2 Be able to maintain effective working relationships with colleagues

LO3 Be able to collaborate with colleagues to resolve problems

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Feedback should not be restricted just to that normally given by a team leader or supervisor – it should focus on the interaction between team members – supporting each other.

Conflict management techniques might include, but is not limited to:

- Forcing
- Win-win – collaborating
- Compromising
- Withdrawing
- Smoothing
- Include the use of real life examples.

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

ML2 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

BUS13 – Manage diary systems

Unit reference number: L/506/1807

Level: 2
Credit value: 2
Guided Learning (GL) hours: 12

Unit aim

The aim of this unit is to provide learners with an understanding of the management of diary systems and apply this understanding to manage diary systems.

Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Understand the management of diary systems

LO2 Be able to manage diary systems

Version 1

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Diary systems include:

- Paper diaries
- Electronic diary systems

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Learning outcomes

Learning Outcome	**Assessment Criteria**
LO1 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

Learning Outcome	**Assessment Criteria**
LO2 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

BUS13 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

SKILLSFIRST

Unit Handbook

CUS7 – Deliver customer service

Unit reference number: A/506/2130

Level: 2
Credit value: 5
Guided Learning (GL) hours: 27

Unit aim

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 to support improvements to customer service delivery.

Learning outcomes

There are five outcomes to this unit. The learner will:

LO1 Understand customer service delivery

LO2 Understand the relationship between customer service and a brand

LO3 Be able to prepare to deal with customers

LO4 Be able to provide customer service

LO5 Be able to support improvements to customer service delivery

Version 1

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Features - Characteristics, attributes and qualities of a product or service

Benefits - Advantages, uses, plusses and pros of a service or product

Methods of measuring their own effectiveness may include, but are not limited to:
- Customer feedback
- Peer feedback
- Reviewing performance against targets

Brand is a type of product /service provided by a particular company under a specific name

Customer service language could include phrases such as:
- “My pleasure”
- “No problem”
- “Have a good day”
- “Thank you for your custom”

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for customer service.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 Understand the relationship between customer service and a brand	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

Learning Outcome	Assessment Criteria
LO3 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

Learning Outcome	Assessment Criteria
LO4 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

Learning Outcome	Assessment Criteria
LO5 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

CUS7 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS11 – Make telephone calls to customers

Unit reference number: K/506/2155

Level: 2
Credit value: 3
Guided Learning (GL) hours: 16

Unit aim

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

Learning outcomes

There are three outcomes to this unit. The learner will:

LO1 Understand how to make telephone calls to customers

LO2 Be able to plan telephone calls to customers

LO3 Be able to make telephone calls to customers

Version 1

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Questioning techniques may include, but is not exclusive to:
- Open
- Closed
- Verbal
- Written
- Probing
- Clarification

Simulation is not allowed.

Assessment guidance

This unit is endorsed by Instructus Skills who are the SSC for customer service.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

CUS11 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS14 – Exceed customer expectations

Unit reference number: Y/506/2135

Level: 2
Credit value: 3
Guided Learning (GL) hours: 15

Unit aim

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

There are two outcomes to this unit. The learner will:

LO1 Understand how to exceed customer expectations

LO2 Be able to exceed customer expectations

Version 1

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Legislation could include;

- Sale of goods Act 1979 (as amended)
- Age restrictive legislation covering for example the sale of:
    - Tobacco - Children and Young Persons (Protection from Tobacco) Act 1991 and Children and Young Person (Sale of Tobacco) Order 2007
    - Alcohol products - Licensing Act 2003
    - Spray paint – Anti Social Behaviour Act 2003
    - Knives – Criminal Justice Act 1988 etc.
- Equality Act 2010
- H&S at Work Act 1974

Organisational policies - this will depend on the organisation you are employed by but could include, for example:

- Time in which goods can be returned (returns policy)
- Gift receipts
- Condition in which goods can be returned
- Validity of gift vouchers – expiry date
- Availability of the service offer
- Restrictions on the service offer, e.g., one per household, per customer
- H&S at work implications of any offer, e.g., working hours

Added Value is the extra, over and above the basic product or service offer that an organisation makes to its customers. This added value represents extra benefits that can truly delight the customers and keep them loyal

The **service offer** is defined as the extent and limits of the customer service that an organisation is offering

Offers to customers could include:

- Providing promotional vouchers
- Offering additional service within organisational guidelines
- Offering additional services that have been advertised
- Making verbal offers as appropriate, e.g., offering something which is approved by the organisation but which the customer thinks has come from the individual

Simulation is not allowed

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for customer service.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

CUS14 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS17 – Resolve customer service problems

Unit reference number: A/506/2158

Level: 2
Credit value: 5
Guided Learning (GL) hours: 22

Unit aim

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

Learning outcomes

There are three outcomes to this unit. The learner will:

LO1 Understand the resolution of customer service problems

LO2 Be able to resolve customer service problems

LO3 Be able to manage unresolved customer service problems

Version 1

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

In AC 1.2 **techniques** include, types of questioning used, communicating with both customers and colleagues, active listening

In AC 1.3 **techniques** may relate to learners own communication style, body language, active listening or referral and involvement of others

Others may include colleagues, supervisors, managers.

Other sources of help may be internal or external to an organisation i.e. managers or the Citizens Advice Bureau.

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for customer service.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

CUS17 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

CUS18 – Deliver customer service to challenging customers

Unit reference number: F/506/2159

Level: 2
Credit value: 3
Guided Learning (GL) hours: 16

Unit aim

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 understanding to deal with challenging customers.

Learning outcomes

There are two outcomes to this unit. The learner will:

LO1 Understand the delivery of customer service to challenging customers

LO2 Be able to deal with challenging customers

Version 1

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Challenging customers may have:
- Problems/ questions
- Additional needs / requirements
- Poor communication skills and language barriers

or be:
- Angry
- Unreasonable
- Confused

Behaviours may include but are not limited to:
- Aggression
- Frustration
- Irritation
- Confrontation

Techniques may include but are not limited to:
- Active listening
- Asking questions
- Showing empathy
- Using positive body language
- Taking action

Service offer defines the extent and limits of the customer service that an organisation is offering

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for customer service.

Learning outcomes

Learning Outcome	**Assessment Criteria**
LO1 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

Learning Outcome	**Assessment Criteria**
LO2 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

CUS18 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

ML1 – Manage personal performance and development

Unit reference number: L/506/1788

Level: 2
Credit value: 4
Guided Learning (GL) hours: 18

Unit aim

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

There are four outcomes to this unit. The learner will:

LO1 Be able to manage personal performance

LO2 Be able to manage their own time and workload

LO3 Be able to identify their own development needs

LO4 Be able to fulfil a personal development plan

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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”

Learning Outcome	Assessment Criteria
LO3 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

Learning Outcome	Assessment Criteria
LO4 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

ML1 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

SA203 – Selling face to face

Unit reference number: L/502/8564

Level: 2
Credit value: 5
Guided Learning (GL) hours: 33

Unit aim

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

Learning outcomes

There are five outcomes to this unit. The learner will:

LO1 Understand how to sell to customers face to face

LO2 Be able to prepare for the sale

LO3 Be able to conduct a face to face sales meeting with the customer

LO4 Be able to deal with sales objections during face to face sales situations

LO5 Be able to close the sale

Version 1

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which covers all the learning outcomes and meets all the assessment criteria.

Assessment guidance

Cross-selling - this is the action, or practice, of selling an additional product or service to an existing customer.

Up-selling – this is a sales strategy where the seller will provide opportunities to purchase related products or services, often for the sole purpose of making a larger sale.

Add-on selling – this is the sale of additional goods or services to a buyer.

Buying needs and interests – may include, but not limited to:

- price
- after-sales service
- exclusivity or specific/specialist features

Unique selling point (or USP) – this is something that differentiates a product or service from its competitors, such as the lowest cost, the highest quality or the first-ever product/service of its kind. A USP could be thought of as “what you have that competitors don’t.”

Details of the relationship between the unit and relevant national occupational standards

These qualifications are based on NOS which have been developed by CfA, the sector skills council for Sales.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

Learning Outcome	Assessment Criteria
LO4 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

Learning Outcome	Assessment Criteria
LO5 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

SA203 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

SA208 – Preparing and delivering a sales presentation

Unit reference number: T/502/8588

Level: 2 **Credit value: 3** **Guided Learning (GL) hours: 20**

Unit aim

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

There are four outcomes to this unit. The learner will:

LO1 Understand how to prepare and deliver a sales demonstration

LO2 Be able to prepare for a sales demonstration

LO3 Be able to deliver a sales demonstration

LO4 Be able to evaluate the sales demonstration

Version 1

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which covers all the learning outcomes and meets all the assessment criteria.

Assessment guidance

Sales demonstration – this is a method that shows the performance of a product in actual conditions, or encourages trial purchase and use of the product/service for evaluation by the customer.

Sales targets – these are an agreed specified amount of sales or income that has been set for achieving or exceeding within a specified timeframe.

Details of the relationship between the unit and relevant national occupational standards

These qualifications are based on NOS which have been developed by CfA, the sector skills council for Sales.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by CfA, the sector skills council for Sales.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

Learning Outcome	Assessment Criteria
LO4 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

SA208 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

Unit Handbook

SA212 – Generating and qualifying sales leads

Unit reference number: H/502/8599

Level: 2 **Credit value: 2** **Guided Learning (GL) hours: 15**

Unit aim

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

Learning outcomes

There are three outcomes to this unit. The learner will:

LO1 Understand the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads

LO2 Understand the process of generating and qualifying sales leads

LO3 Be able to prospect for customers

Version 1

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which covers all the learning outcomes and meets all the assessment criteria.

Assessment guidance

Qualifying sales leads - this can be done through direct contact or by research. A qualified sales lead enables the seller to identify a customer who wants a particular service or product, has the financial capabilities to purchase, has the authority to make a decision and has the resources and/or systems in place for the service or product to be used.

Segmentation - to put customers into groups which have something in common, such as age, work skills, qualification level, job expectations, buying patterns, etc.

Cross-selling - this is the action, or practice, of selling an additional product or service to an existing customer.

Up-selling - this is a sales strategy where the seller will provide opportunities to purchase related products or services, often for the sole purpose of making a larger sale.

Details of the relationship between the unit and relevant national occupational standards

These qualifications are based on NOS which have been developed by CfA, the sector skills council for Sales.

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by CfA, the sector skills council for Sales.

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

SA212 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Rebranded	Qualifications Administrator

RRNC2 Document History

Version	Issue Date	Changes	Role