REC Level 3 NVQ Diploma in Recruitment Syllabus

REC | Recruitment & Employment Confederation

Candidates must achieve:................. all 9 Mandatory units, providing 28 credits & 13 credits from any combination of Optional units

The REC Level 3 NVQ Diploma in Recruitment has been developed to provide recruitment professionals and potential recruitment professionals, with an industry recognised competency qualification at level 3.

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

1. Confirm clients' staffing requirements
2. Analyse the role requirements of staff sought
3. Confirm recruitment arrangements with clients
4. Shortlist candidates
5. Present pre-selected candidates to clients

6. Plan candidate assessments
7. Carry out candidate assessments
8. Understand the basis for choosing selection methods and media
9. Develop and maintain a candidate database
10. Match candidates
11. Present candidates to clients
12. Plan candidate attraction activities
13. Implement candidate attraction activities
14. Build relationships with candidates
15. Identify candidates' needs
16. Brief candidates on employer requirements
17. Support candidates
18. Review candidates' progress
19. Exchange feedback with candidates
20. Administer the recruitment process
21. Administer the selection process
22. Administer the appointment process
23. Understand the benefits of working with colleagues
24. Be able to establish working relationships with colleagues
25. Be able to act in a professional and respectful manner when working with colleagues
26. Be able to communicate with colleagues
27. Be able to identify potential work-related difficulties and explore solutions
28. Understand human resource planning
29. Define clients' operational recruitment needs
30. Understand the basis for choosing recruitment methods and media
31. Analyse the effectiveness of the recruitment solutions
32. Agree with clients how recruitment needs will be met
33. Develop a recruitment resourcing plan
34. Understand networking tools to create relationships with clients in recruitment
35. Build and sustain relationships with clients in recruitment
36. Place flexible workers with clients
37. Manage clients' bookings for flexible staff
38. Co-ordinate the needs of flexible workers
39. Be able to identify the need for market research
40. Be able to design market research projects
41. Be able to manage market research data collection
42. Understand how to handle objections and negotiate with the customer
43. Be able to prepare for objections and negotiation with the customer
44. Be able to handle objections
45. Be able to negotiate with the customer
46. Be able to close the sale following negotiation
47. Understand the impact of different models of buyer behaviour on the sales cycle
48. Be able to respond to the buyer at each stage of the decision making process
49. Be able to identify competitor activity
50. Be able to determine the nature of the threat posed by competitor activity
51. Understand how to write sales proposals
52. Be able to develop sales proposals
53. Be able to evaluate the proposal
54. Understand the factors for consideration in the preparation of sales presentations
55. Be able to prepare a sales presentation
56. Understand how to deliver sales presentations
57. Be able to deliver a sales presentation
58. Understand the benefits of networking and the need for data privacy
59. Be able to develop a personal network of contacts
60. Be able to review networking relationships

Identify client recruitment requirements
REC 3-2

Level	3
Credit Value	3
GLH	10

Unit aims

This unit concerns confirming clients' staffing requirements, analysing the role requirements of staff sought and confirming recruitment arrangements with clients.

Learning outcomes

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

1. Confirm clients' staffing requirements
2. Analyse the role requirements of staff sought
3. Confirm recruitment arrangements with clients

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

1. Confirm clients' staffing requirements

1.1 Establish the numbers of people needed in which roles
1.2 Establish the client's policies and requirements for experience, skills, qualifications, attributes and any other relevant candidate requirements
1.3 Clarify the contractual terms of the staff sought by the clients

2. Analyse the role requirements of staff sought

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

3. Confirm recruitment arrangements with clients

3.1 Confirm the services to be offered
3.2 Confirm terms of business and timescales
3.3 Ensure that agreements meet legal and ethical requirements

Pre-select candidates
REC 3-4

Level	3
Credit Value	3
GLH	10

Unit aims

This unit concerns shortlisting candidates and presenting pre-selected candidates to clients

Learning outcomes

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

1. Shortlist candidates
2. Present pre-selected candidates to clients

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

1.   Shortlist candidates

1.1   Assess candidates against the agreed criteria
1.2   Identify any attractive prospects who do not meet the criteria but who offer potentially valuable alternatives
1.3   Inform those who are not pre-selected of the outcome in accordance with organisational standards and procedures
1.4   Confirm the interest, identity, suitability and availability of those pre-selected
1.5   Ensure all pre-selection processes meet legal and ethical requirements

2.   Present pre-selected candidates to clients

2.1   Present shortlisted candidates to clients in the agreed format and timescale
2.2   Promote the shortlisted candidates, explaining how they meet the client's requirements
2.3   Agree with the client which candidates they will consider

Assess candidates
REC 3-5

Level	3
Credit Value	3
GLH	20

Unit aims

This unit concerns planning candidate assessments, carrying out candidate assessments and understanding the basis for choosing selection methods and media

Learning outcomes

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

1. Plan candidate assessments
2. Carry out candidate assessments
3. Understand the basis for choosing selection methods and media

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

1.   Plan candidate assessments

1.1 Confirm the objectives of the assessment process(es)
1.2 Assemble the resources needed for the assessment process
1.3 Invite candidates to carry out the assessment process(es) in accordance with organisational standards and procedures

2.   Carry out candidate assessments

2.1 Carry out assessments in accordance with the resourcing plan, job and personal specification and good industry practice in the use of interviewing techniques
2.2 Make assessments that are objective and evidence-based
2.3 Inform candidates of the next step(s) and/or results in the process in accordance with organisational standards and procedures
2.4 Record the outcomes of the assessment in accordance with organisational standards and procedures
2.5 Ensure the assessment process(es) meet legal and ethical requirements

3.   Understand the basis for choosing selection methods and media

3.1 Explain the features, requirements, advantages and disadvantages of a range of selection methods (pre-selection, interviewing (biographical and competence assessment), assessment centres, psychometric testing
3.2 Explain why some selection methods are better suited to some roles than others

Match and present candidates to employers
RECTC 3-6

Level	3
Credit Value	4
GLH	30

Unit aims

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

Learning outcomes

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

1. Develop and maintain a candidate database
2. Match candidates
3. Present candidates to clients

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

1. Develop and maintain a candidate database

1.1 Agree the criteria by which candidates will be included on the candidate database
1.2 Obtain sufficient relevant information about candidates to enable matching to take place
1.3 Keep the candidate database up to date

2. Match candidates

2.1 Identify potentially suitable job opportunities that meet candidates' specifications and candidates who meet client specifications
2.2 Promote suitable candidates to clients and suitable clients to candidates
2.3 Inform candidates of the nature and details of the selection assessment

3. Present candidates to clients

3.1 Present candidates to clients in the agreed format and timescale
3.2 Promote shortlisted candidates, explaining how they meet the client's requirements
3.3 Agree with the client which candidates will be accepted
3.4 Record placements and carry out associated administrative and financial actions in accordance with organisational procedures
3.5 Provide constructive feedback to candidates on the results of the submission and assessment
3.6 Use feedback to make improvements to the recruitment process
3.7 Ensure all recruitment policies, materials and processes meet legal and ethical requirements

Attract potential candidates
REC 3-8

Level	3
Credit Value	3
GLH	20

Unit aims

This unit concerns planning candidate attraction activities, implementing candidate attraction activities and building relationships with candidates

Learning outcomes

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

1. Plan candidate attraction activities
2. Implement candidate attraction activities
3. Build relationships with candidates

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

1. Plan candidate attraction activities

1.1 Select networks and marketing methods and media that are likely to reach the desired candidate group(s)
1.2 Specify the timescale
1.3 Ensure all recruitment activities, materials and processes meet legal and ethical requirements

2. Implement candidate attraction activities

2.1 Deliver the plan within the agreed timescale
2.2 Manage problems in accordance with organisational procedures
2.3 Keep stakeholders up to date with progress, developments and issues
2.4 Record and report on the outcomes of the implementation in accordance with the plan and organisational procedures
2.5 Create job advertisements that capture all the required information using relevant and accurate information sources
2.6 Explain the principles of effective job advertisement design (Attention, Desire, Interest, Action (AIDA))
2.7 Ensure all recruitment advertising, materials and processes meet legal and ethical requirements

3. Build relationships with candidates

3.1 Qualify candidates in accordance with organisational standards and procedures
3.2 Provide information and advice that would enhance candidates' employability
3.3 Use opportunities to promote the candidate for suitable positions
3.4 Apply customer service techniques in building productive relationships with potential candidates
3.5 Record all contact with and information about candidates that is likely to add to understanding about candidates and clients

Brief and support candidates
REC 3-9

Level	3
Credit Value	3
GLH	15

Unit aims

This unit concerns identifying candidates' needs, briefing candidates on employer requirements and supporting them

Learning outcomes

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

1. Identify candidates' needs
2. Brief candidates on employer requirements
3. Support candidates

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

1. Identify candidates' needs

1.1 Identify the nature of candidates' needs and expectations
1.2 Agree priorities, availability, flexibilities and action plans
1.3 Record agreements and information in accordance with organisational procedures

2. Brief candidates on employer requirements

2.1 Brief candidates on employers' requirements and preferences
2.2 Provide constructive and sensitive feedback to candidates on their job-search performance
2.3 Ensure all recruitment policies, materials and processes meet legal and ethical requirements

3. Support candidates

3.1 Take steps to find suitable job opportunities for candidates
3.2 Promote candidates to employers for suitable positions
3.3 Suggest ways of improving candidates' employability
3.4 Negotiate on behalf of candidates to optimum effect (e.g. terms, dates, counter offers)

Carry out candidate debriefing
REC 3-10

Level	3
Credit Value	4
GLH	20

Unit aims

This unit concerns reviewing candidates' progress and exchanging feedback with them

Learning outcomes

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

1. Review candidates' progress
2. Exchange feedback with candidates

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

1. Review candidates' progress

1.1 Keep candidate records and the database of their job search-related activities up to date
1.2 Review the effectiveness of agreed action plans at agreed intervals and adapt them in the light of changing circumstances
1.3 Use information from a range of sources to add to the understanding of candidates' needs and expectations

2. Exchange feedback with candidates

2.1 Provide timely feedback that is constructive, accurate, sensitive and evidence-based
2.2 Give candidates feedback at all stages of the job search programme
2.3 Optimise the personal and business brand through productive relationships with candidates
2.4 Ensure the realism of candidates' expectations, explaining why some may be unachievable
2.5 Ensure all recruitment policies and advice given meet legal and ethical requirement

Administer recruitment processes
REC 2-1

Level	2
Credit Value	2
GLH	20

Unit aims

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

Learning outcomes

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

1. Administer the recruitment process
2. Administer the selection process
3. Administer the appointment process

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

1. Administer the recruitment process

1.1 Ensure that current and accurate job descriptions/role profiles and person specifications are available for the roles being recruited
1.2 Confirm the accuracy and completeness of the terms, conditions, benefits, application and response methods for the roles being recruited
1.3 Place advertisements in the chosen media/locations in accordance with the candidate attraction plan
1.4 Make effective use of internet recruitment in accordance with the candidate attraction plan
1.5 Manage responses in accordance with the candidate attraction plan
1.6 Explain organisational procedures for the recruitment of personnel

2. 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 Carry out financial actions in accordance with organisational procedures

3. Administer the appointment process

3.1 Confirm the terms and conditions on which the candidate will be employed
3.2 Carry out the agreed pre-employment checks

3.3 Communicate offers in accordance with organisational standards and procedures
3.4 Keep databases up to date and maintain the requirements of confidentiality

Develop working relationships with colleagues
D1

Level	2
Credit Value	3
GLH	15

Unit aims

This unit will help learners to establish and develop effective working relationships with colleagues

Learning outcomes

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

1. Understand the benefits of working with colleagues
2. Be able to establish working relationships with colleagues
3. Be able to act in a professional and respectful manner when working with colleagues
4. Be able to communicate with colleagues
5. Be able to identify potential work-related difficulties and explore solutions

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

1.   Understand the benefits of working with colleagues

1.1 Describe the benefits of productive working relationships

2.   Be able to establish working relationships with colleagues

2.1 Identify colleagues within own and other organisations
2.2 Agree the roles and responsibilities for colleagues

3.   Be able to establish working relationships with colleagues

3.1 Explain how to display behaviour that shows professionalism

4.   Be able to establish working relationships with colleagues

4.1 Identify, information to others clearly and concisely
4.2 Explain how to receive and clarify own understanding of information

5.   Be able to establish working relationships with colleagues

5.1 Identify potential work-related difficulties and conflicts of interest
5.2 Explain how to resolve identified potential difficulties

Advise clients on operational recruitment planning REC 3-1

Level	3
Credit Value	4
GLH	15

Unit aims

This unit concerns understanding human resource planning, defining clients' operational recruitment needs, understanding the basis for choosing recruitment methods and media and analysing the effectiveness of the recruitment solutions

Learning outcomes

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

1. Understand human resource planning
2. Define clients' operational recruitment needs
3. Understand the basis for choosing recruitment methods and media
4. Analyse the effectiveness of the recruitment solutions

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

1. Understand human resource planning

1.1 Explain how public and private sector organisations carry out human resource planning
1.2 Identify the factors to be taken into account in human resource planning
1.3 Explain the importance of the role of recruitment in human resource planning
1.4 Assess the recruiter's role in human resource planning

2. Define clients' operational recruitment needs

2.1 Explain employment-related trends and patterns in the client's industry
2.2 Determine the client's current operational needs
2.3 Advise on the availability of suitable personnel in the labour market
2.4 Calculate the cost of hiring time, fees/staff costs to the client
2.5 Present a recruitment solution to the client, showing costs, benefits and performance measures
2.6 Agree mutually acceptable terms and conditions of business with the client
2.7 Ensure all recruitment policies, materials and processes meet legal and ethical requirements

3. Understand the basis for choosing recruitment methods and media

3.1 Explain the features, requirements, advantages and disadvantages of a range of recruitment methods (word of mouth, newspaper adverts, TV, radio, e-recruitment, agencies/consultancies, job clubs, training schemes, networking, etc.)
3.2 Explain why some recruitment methods and media are better suited to some roles than others

4. Analyse the effectiveness of the recruitment solutions

4.1 Analyse valid information using valid methods of evaluation
4.2 Identify the success of the solutions in meeting the client's objectives

Develop resourcing plan for recruitment services
REC 3-3

Level	3
Credit Value	4
GLH	15

Unit aims

This unit concerns agreeing with clients how recruitment needs will be met and developing a recruitment resourcing plan

Learning outcomes

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

1. Agree with clients how recruitment needs will be met
2. Develop a recruitment resourcing plan

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

1. Agree with clients how recruitment needs will be met

1.1 Clarify the client's recruitment and selection preferences and/or processes
1.2 Recommend the optimum method(s) of recruitment and selection for a range of roles
1.3 Advise the client on any potential adverse effect associated with recruitment methods
1.4 Ensure all recruitment policies, materials and processes meet legal and ethical requirements

2. Develop a recruitment resourcing plan

2.1 Ensure the plan includes SMART objectives, candidate attraction plan, application method(s), circulation arrangements, quality standards, resource allocations, contingencies, success criteria, validation processes and evaluation mechanisms
2.2 Ensure the plan specifies the chosen recruitment and selection method(s) and is achievable within budget and timescale
2.3 Ensure the resourcing plan meets legal and ethical requirements

Sustain customer-focused relationships with clients REC 3-7

Level	3
Credit Value	6
GLH	30

Unit aims

This unit concerns understanding networking tools to create relationships with clients, building and sustaining relationships with clients in recruitment

Learning outcomes

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

1. Understand networking tools to create relationships with clients in recruitment
2. Build and sustain relationships with clients in recruitment

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

1. Understand networking tools to create relationships with clients in recruitment

1.1 Explain the purpose and benefits of recruitment networking
1.2 Explain how different social media can be used for recruitment networking and marketing purposes
1.3 Explain the importance and requirements of creating a personal "brand"

2. Build and sustain relationships with clients in recruitment

2.1 Plan an approach that is appropriate to different kinds of recruitment relationship (existing lapsed, potential) and their position in the buying cycle
2.2 Identify the client's needs, preferences, priorities, policies and problems as they relate to recruitment
2.3 Apply customer service techniques in building productive relationships with recruitment clients
2.4 Identify and manage recruitment client expectations
2.5 Explain the components and functions of account management in recruitment
2.6 Use opportunities to maintain productive contact with recruitment clients
2.7 Explain methods of assessing the effectiveness of the relationship (e.g. client satisfaction surveys, Service Level Agreements, business reviews, performance and efficiency indicators)
2.8 Ensure all activities and records meet legal and ethical requirements

Co-ordinate flexible workers
REC 3-11

Level	3
Credit Value	6
GLH	40

Unit aims

This unit concerns placing flexible workers with clients, managing clients' bookings for flexible staff and co-ordinating the needs of flexible workers

Learning outcomes

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

1. Place flexible workers with clients
2. Manage clients' bookings for flexible staff
3. Co-ordinate the needs of flexible workers

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

1. Place flexible workers with clients

1.1 Confirm the roles, requirements and duration of appointments for flexible workers in accordance with current legislation
1.2 Agree rates of pay and any other benefits and conditions in accordance with current legislation
1.3 Carry out any necessary pre-appointment checks
1.4 Place suitable flexible workers within the agreed timescale
1.5 Use feedback from continuing contact with flexible workers to make improvements

2. Manage clients' bookings for flexible staff

2.1 Confirm the suitability and efficiency of flexible staff placed with employers
2.2 Keep databases of flexible workers up to date
2.3 Ensure the accuracy of contractual records
2.4 Use information and feedback from clients to enhance the service
2.5 Arrange for payments to be made in accordance with agreements

3. Co-ordinate the needs of flexible workers

3.1 Maintain current and accurate records of flexible workers' skills and availability
3.2 Maintain the continuing commitment of inactive flexible workers through regular contact
3.3 Market for new flexible workers in accordance with the candidate attraction plan
3.4 Ensure all recruitment policies, materials and processes meet legal and ethical requirements

Conduct market research
MK 3-2

Level	3
Credit Value	6
GLH	

Unit aims

This unit concerns being able to identify the need for market research, design market research projects and manage market research data collection

Learning outcomes

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

1. Be able to identify the need for market research
2. Be able to design market research projects
3. Be able to manage market research data collection

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

1. Be able to identify the need for market research

1.1 Establish the nature of the marketing issue for which information is needed
1.2 Agree the research budget and timescale
1.3 Agree specific, measurable, realistic and time-bound objectives

2. Be able to design market research projects

2.1 Determine the research method(s) and instrument(s) best suited to obtaining the required information within budget
2.2 Establish the sources of reliable quantitative and qualitative information most likely to yield the required information
2.3 Develop a research project proposal and rationale that addresses the research objectives
2.4 Obtain approval to the specified actions, responsibilities, timescales and budget for the research
2.5 Explain the strengths and limitations of the ranges of proposed research methods
2.6 Explain the use of a sample in designing market research projects
2.7 Explain the importance of validating information

3. Be able to manage market research data collection

3.1 Ensure that the team is briefed on the objectives and data collection tasks
3.2 Ensure that data collection activities are carried out in accordance with the market research plan
3.3 Provide progress and variance reports in accordance with the data collection plan
3.4 Address issues and variances in accordance with the market research plan
3.5 Ensure that the data collection is conducted in accordance with legal, regulatory and industry requirements and standards

3.6 Present the data in the agreed format within the agreed timescale

3.7 Evaluate the effectiveness of the market research data collection against agreed criteria

Negotiating, handling objections and closing sales SAL 3-1

Level	3
Credit Value	4
GLH	22

Unit aims

Learning outcomes

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

1. Understand how to handle objections and negotiate with the customer
2. Be able to prepare for objections and negotiation with the customer
3. Be able to handle objections
4. Be able to negotiate with the customer
5. Be able to close the sale following negotiation

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

Buyer behaviour in sales situations
SAL 3-4

Level	3
Credit Value	3
GLH	27

Unit aims

Learning outcomes

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

1. Understand the impact of different models of buyer behaviour on the sales cycle
2. Be able to respond to the buyer at each stage of the decision making process

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

Analyse competitor activity
MK 3-1

Level	3
Credit Value	5
GLH	

Unit aims

This unit concerns being able to identify competitor activity and determine the nature of the threat posed by competitors

Learning outcomes

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

1. Be able to identify competitor activity
2. Be able to determine the nature of the threat posed by competitor activity

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

1. Be able to identify competitor activity

1.1 Identify organisations competing for the same customers
1.2 Identify potentially threatening competitor activity
1.3 Identify competitors' objectives
1.4 Identify valid sources of information on competitors and their activity
1.5 Explain the advantages and disadvantages of sources of information on competitors and their activity

2. Be able to determine the nature of the threat posed by competitor activity

2.1 Assess the strengths and weaknesses of competitor activity against agreed criteria
2.2 Assess the strengths and weaknesses of competitors' products and/or services against agreed criteria
2.3 Determine the nature and extent of the possible threat posed by competitor activity and products and/or services

Developing sales proposals
SAL 4-3

Level	4
Credit Value	5
GLH	30

Unit aims

Learning outcomes

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

1. Understand how to write sales proposals
2. Be able to develop sales proposals
3. Be able to evaluate the proposal

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

1. Understand how to write sales proposals

1.1 Explain how to write a proposal that differentiates the offer from that of a competitor and promotes organisational strengths
1.2 Describe how to put together a persuasive argument based on quantitative and qualitative evidence
1.3 Explain the importance of addressing the brief in tender documentation
1.4 Explain the importance of using the "house style" in proposals
1.5 Explain the legal and ethical issues relating to sales proposals
1.6 Explain the client's procedures for submitting sales proposals

2. Be able to develop sales proposals

2.1 Ensure the prospect's or customer's requirements are addressed in the proposal
2.2 Ensure that all identified issues requiring clarification are resolved before the proposal is finalised
2.3 Identify the conditions and constraints which need to be included within the proposal in order to protect the organisation's interests
2.4 Present the proposal in "house style"
2.5 Ensure that the proposal is based on market factors
2.6 Provide the required level of detail as briefed by the prospect or customer
2.7 Ensure that the price reflects the value within the proposal
2.8 Gain internal approval before submission
2.9 Supply the proposal within the agreed timescale

3. Be able to evaluate the proposal

3.1 Obtain feedback from colleagues and the customer on the proposal
3.2 Evaluate the outcome of the proposal and recommend improvements for the future

Preparing and delivering a sales presentation
SAL 3-7

Level	3
Credit Value	4
GLH	28

Unit aims

Learning outcomes

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

1. Understand the factors for consideration in the preparation of sales presentations
2. Be able to prepare a sales presentation
3. Understand how to deliver sales presentations
4. Be able to deliver a sales presentation

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

Level	4
Credit Value	4
GLH	25

Unit aims

Learning outcomes

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

1. Understand the benefits of networking and the need for data privacy
2. Be able to develop a personal network of contacts
3. Be able to review networking relationships

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

1. Understand the benefits of networking and the need for data privacy

1.1 Evaluate the benefits of networking with individuals and organisations
1.2 Identify individuals and organisations that would provide benefits to own organisation and networks
1.3 Explain the need for confidentiality with networking contacts

2. Be able to develop a personal network of contacts

2.1 Develop networks that will provide personal and organisational benefit
2.2 Develop guidelines for working with networks in line with organisational procedures

3. Be able to review networking relationships

3.1 Assess the value own current personal network
3.2 Evaluate own experience with existing contacts and use these to inform future actions