



**Specification**

**Level 3**

**Sales Qualifications**

**Valid from 01.07.19**

**Version 6**

Ofqual regulated

# ISM

The Institute of Sales Management (ISM) is the professional membership body for salespeople. Our mission is to promote standards of excellence in sales and enhance the status of sales as a profession.

ISM members are drawn from every sector of industry and commerce. From those just embarking upon a sales career through to senior and experienced sales managers and directors, they share a commitment to upholding the standards of professionalism and integrity that are all hallmarks of sales success. We are recognised by the English government regulatory body Ofqual as an awarding organisation to offer qualifications in Sales and Sales Management.

To find out more about what we do, visit our website at [www.ismprofessional.com](http://www.ismprofessional.com).

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# Section 1

## 1.1 Introduction

This booklet is to inform ISM learners and centres about the delivery and assessment of the ISM Level 3 qualifications on the Regulated Qualifications Framework (RQF). The latest version of this document will always be posted on the ISM website at [www.ismprofessional.com](http://www.ismprofessional.com). It should be read in conjunction with the Centre Guide which gives detailed guidance on running the qualifications in your centre. The Centre Guide is available on request; [education@ismprofessional.com](mailto:education@ismprofessional.com)

## 1.2 REGULATED QUALIFICATIONS FRAMEWORK (RQF)

The RQF provides a single framework for cataloguing all qualifications regulated by Ofqual.

There are eight levels of the RQF, underpinned by three 'entry' levels. A qualification's level indicates the difficulty and complexity of the knowledge and skills associated with the qualification.

The size of the qualification is determined by the estimated number of study hours both supervised and self study a typical learner will need to achieve the qualification is expressed in terms of Total Qualification Time (TQT).

For further information on the RQF, please visit Ofqual's website:  
<https://www.gov.uk/find-a-regulated-qualification>

## 1.3 Who are the qualifications aimed at?

The level 3 qualifications have been approved for use with the following age groups:

- 16-18
- 18+

Level 3 qualifications are Vocationally Related Qualifications designed for sales professionals with at least one or two years' experience working in sales, wishing to deepen their knowledge and skills in sales, and possibly aspiring to team management.

We do not specify entry requirements for these qualifications, but centres are required to ensure that learners admitted to the programme have sufficient experience, aptitude and ability at the right level to undertake the learning and assessment.

## 1.4 Qualification definitions

All qualifications on the Regulated Qualification Framework (RQF) have a 'size' which is expressed in terms of total qualification time (TQT). TQT is a guide for the total amount of time measured in hours that a typical learner would need to be able to evidence the level of achievement necessary for the award of a qualification.

There are three sizes of qualifications: Awards, Certificates and Diplomas. These are determined by the TQT required to achieve the qualification.

An Award has a TQT of between 10 and 120 hours, a Certificate has a TQT of between 130 and 360 hours and a Diploma has a TQT of 370 hours or more.

The terms Award, Certificate and Diploma do not describe qualification levels. It is possible to have an Award at level 5, for example, and a Diploma at level 3.

This specification details the ISM's qualifications at level 3. Other specifications are available for other levels.

## 1.5 Unit definition

ISM qualifications are composed of one or more unit(s). A unit is defined as a coherent and explicit set of learning outcomes and assessment criteria with a title, credit value and level. The term 'unit' refers to a unit of assessment. ISM units share a common set of characteristics, are submitted on a template and can be combined to support the creation of coherent programmes of learning and qualifications.

## 1.6 Delivering the qualifications

The ISM does not prescribe any method of delivery to training organisations, which are free to use any methods of delivery suitable to their learners. Methods may include open, distance,

blended or online learning. In qualifications with more than one unit, units may be delivered and assessed in any order.

## **1.7 Grading**

Each unit and each qualification is graded Pass/Fail. A Pass confirms that the required criteria for achievement have been met. Where qualifications consist of more than one unit, the learner must pass each unit to pass the qualification.

## **1.8 Total Qualification Time (TQT) and Guided Learning hours (GLH)**

TQT is comprised of GLH which is under the immediate guidance of a trainer or supervisor including induction, face to face training, e-learning with the co-presence of learner and tutor, invigilated exams and non-supervised directed, private and online study and non-invigilated assessment. Qualifications can be delivered in a class room or through e-learning.

## **1.9 Credit**

Each ISM qualification has a Credit value. Credit is calculated by dividing the TQT by ten. For example, a qualification with TQT of 120 hrs would have a credit value of 12.

## **1.10 Indicative content**

In addition to the Learning Outcomes and Assessment Criteria, the ISM qualifications are provided with extensive indicative content advice. The indicative content is provided to guide tutors towards the appropriate topics, theories and models to be covered. However, variation can be made within this advice to suit the needs of both teachers and learners. Tutors should choose from a range of theories and models. Qualifications can only be updated periodically so it is expected that tutors will adapt the content to present the most up to date theory and examples. For example, promotional tools such as social media are being updated constantly and the teaching should reflect this. It is also acceptable to adapt teaching to suit local conditions. For example, to reflect the local legal system.

This content is not prescriptive but is intended to provide helpful guidance to teachers and learners relating to the kinds of evidence that should be provided for each assessment objective to enable the learner to achieve the unit.

In summary, provided the Learning Outcomes and Assessment Criteria are covered, the indicative content can be adapted to reflect current thinking and local conditions.

## 1.11 Progression

The qualifications provide opportunities for progression to other qualifications at the same or higher levels and they support learners in meeting the knowledge and skills requirements for employment within sales. A number of single-unit level 3 Awards can be built up over time to progress to the level 3 Certificate in Sales and Marketing or the larger level 3 Diploma in Sales and Marketing.

## 1.12 Language

The qualification is offered in the medium of the English language

## 1.13 Level description

This qualification has been designed to suit learners working towards a level 3 qualification. Level descriptors are divided into two categories:

- I. Knowledge and understanding
- II. Skills

There is a knowledge descriptor and a skills descriptor for each Level within the framework. The descriptors set out the generic knowledge and skills associated with the typical holder of a qualification at that Level.

For more information please follow this link to the Ofqual website:

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/461637/qualification-and-component-levels.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/461637/qualification-and-component-levels.pdf)

## 1.14 Qualification overview

There are 12 ISM qualifications available at this level: 10 single-unit Awards, 1 composite-unit Certificate and 1 composite-unit Diploma. Units can be built up over time to contribute to the Certificate and Diploma.

The qualification titles given below are the titles as they will appear on the certificate when awarded to the learner. The qualification reference number is the number allocated to the qualification by Ofqual upon accreditation. Each unit also has a unique RQF unit number which can be found within the content of each unit in this syllabus.

Qualification title	ISM qualification code	Ofqual qualification reference number (QAN code)	Credit
Level 3 Award in Preparing and delivering a sales presentation	A301	600/0230/X	5
Level 3 Award in Handling objections, negotiating and closing sales	A302	600/0231/1	6
Level 3 Award in Understanding influences on buyer behaviour	A303	600/0232/3	3
Level 3 Award in Understanding customer segmentation and profiling	A304	600/0233/5	4
Level 3 Award in Understanding sales and marketing in organisations	A305	600/0235/9	4
Level 3 Award in Using market information for sales	A306	600/0236/0	5
Level 3 Award in Time and territory management for sales people	A307	600/0238/4	6
Level 3 Award in Planning for professional development	A308	600/0240/2	2

Level 3 Award in Prospecting for new business	A309	600/0237/2	4
Level 3 Award in Sales pipeline management	A310	600/0239/6	6
Level 3 Certificate in Sales and Marketing	C301	600/0241/4	17
Level 3 Diploma in Sales and Marketing	D301	600/0242/6	37

## 1.15 Unit overview

The following units are offered as single-unit Awards and within the Certificate. Please note one of the units is a level 2 unit, which is also offered as a standalone level 2 Award; please see the level 2 specification if you are interested in this as a standalone qualification.

Unit title	Unit level	ISM unit number	RQF unit code	Credit	Assessment method(s)
Understanding laws and ethics of selling	2	U201	Y/502/7482	3	Work based evidence or assignment
Preparing and delivering a sales presentation	3	U301	R/502/7500	5	Work based evidence or assignment
Handling objections, negotiating and closing sales	3	U302	Y/502/7501	6	Work based evidence or assignment
Understanding influences on buyer behaviour	3	U303	D/502/7502	3	Work based evidence or assignment

Understanding customer segmentation and profiling	3	U304	K/502/7504	4	Work based evidence or assignment
Understanding sales and marketing in organisations	3	U305	M/502/7505	4	Work based evidence or assignment
Using market information for sales	3	U306	T/502/7506	5	Work based evidence or role play assignment
Time and territory management for sales people	3	U307	A/502/7507	6	Work based evidence or assignment
Planning for professional development	3	U308	Y/502/5652	2	Work based evidence or assignment
Prospecting for new business	3	U309	F/502/7508	4	Work based evidence or assignment
Sales pipeline management	3	U310	J/502/7509	6	Work based evidence or assignment

## 1.16 Rules of combination for composite qualifications

Unit combinations for qualifications consisting of more than one unit at this level are listed below.

The **Level 3 Certificate in Sales and Marketing** consists of a combination of units. To achieve the Certificate, learners must complete each of the mandatory units U201, U301, U302 and U303, totalling 17 credits.

### Level 3 Certificate in Sales and Marketing

Unit code	Unit title	Mandatory/Optional	Assessment	Credit
U201	Understanding laws and ethics of selling	Mandatory	Work based evidence or assignment	3
U301	Preparing and delivering a sales presentation	Mandatory	Work based evidence or assignment	5
U302	Handling objections, negotiating and closing sales	Mandatory	Work based evidence or assignment	6
U303	Understanding influences on buyer behaviour	Mandatory	Work based evidence or assignment	3

The **Level 3 Diploma in Sales and Marketing** consists of a combination of units. To achieve the Diploma, learners must complete each of mandatory units U201, U301, U302 and U303, giving 17 credits, plus any of the optional units giving a minimum of another 20 credits, to a total of at least 37 credits.

### Level 3 Diploma in Sales and Marketing

Unit code	Unit title	Mandatory/ Optional	Assessment	Credit
U201	Understanding laws and ethics of selling	Mandatory	Work based evidence or assignment	3
U301	Preparing and delivering a sales presentation	Mandatory	Work based evidence or assignment	5
U302	Handling objections, negotiating and closing sales	Mandatory	Work based evidence or assignment	6
U303	Understanding influences on buyer behaviour	Mandatory	Work based evidence or assignment	3
U304	Understanding customer segmentation and profiling	Optional	Work based evidence or assignment	4
U305	Understanding sales and marketing in organisations	Optional	Work based evidence or assignment	4
U306	Using market information for sales	Optional	Work based evidence or assignment	5
U307	Time and territory management for sales people	Optional	Work based evidence or assignment	6
U308	Planning for professional development	Optional	Work based evidence or assignment	2
U309	Prospecting for new business	Optional	Work based evidence or assignment	4
U310	Sales pipeline management	Optional	Work based evidence or assignment	6

## 1.17 Assessment

All units will be internally assessed by the centre and externally verified by the ISM. No units are assessed by examination in these qualifications. Learners will need to show that they meet each of the assessment criteria detailed within each unit, to the required standard for the level of the unit. For further details on the assessment please refer to the ISM Centre Guide.

### Centre assessment staff

The centre is required to appoint at least one Assessor who is responsible for assessing the learning against the assessment criteria in the unit. The Assessor may be the teacher or trainer who delivers the learning.

The centre is also required to appoint an Internal Quality Assurer who is accountable for the verification of the all assessment decisions in the centre for the ISM qualification(s). The Assessor and Internal Quality Assurer roles must be carried out by different people. If your centre has difficulty finding a suitable person for the Internal Quality Assurer role please contact the ISM at [education@ismprofessional.com](mailto:education@ismprofessional.com) or phone 01582 227 801

### ISM assessment staff

An ISM-appointed External Quality Assurer is linked to the centre for the purposes of support, guidance and external verification. The External Quality Assurer checks that the centre is applying the correct standards and either approves the centre's assessment decisions or gives guidance until centre decisions are deemed to be accurate.

### Assessment routes

There are four possible routes to fulfilling the assessment criteria for each unit, and each route is equally valid:

- Route A is via Work Based Evidence
- Route B is via Model Assignment
- Route C is via Contextualised Model Assignment
- Route D is via Centre Devised Assignment

One route must be chosen per learner per unit. A centre with more than one learner may assess some learners through one route and other learners through another route at the same time or over a period of time. Learners taking qualifications consisting of more than one unit can provide evidence through one route for one unit and through other routes for other units. However, where the route chosen does not cover adequately some of the assessment criteria, evidence from other routes may be added to fulfill the assessment criteria.

Centres are asked to indicate which route(s) they intend to offer, when applying for ISM centre recognition. Model Assignments are provided on request.

### **Route A: Work Based Evidence**

This route is available for learners employed in sales who have the opportunity to produce work based evidence showing that they have met the assessment criteria through their employment. Evidence must be generated through their day to day work and may take any format, as long as it produces relevant tangible evidence which can be accessed by a third party.

Examples of types of evidence are:

- Witness statements
- Observations of performance in the work environment
- Learner statements
- Written evidence such as diaries, emails, reports, presentation slides
- Photos
- Video recordings
- Interview or viva voce
- Project documentation
- Verbal presentations

This list is not conclusive.

Work based evidence may be built up over time and assessment criteria in the unit can be 'ticked off' gradually until they are all met. At the time of assessment against the particular assessment criterion, evidence must be current ie produced within the past three years. Evidence must be authentic ie produced by the learner.

Work based evidence should be assessed holistically, and one piece of evidence may cover more than one assessment criterion. One piece of evidence may be used for assessment across different units and across different qualifications, provided it meets the relevant assessment criteria.

### **Route B: Model Assignment**

A Model Assignment is available for each internally assessed unit, which provides the learner with the opportunity to meet all the assessment criteria in the unit. The Model Assignment consists of one or more tasks, based on a fictional yet realistic sales situation. Centres are responsible for providing the Model Assignment to learners and for setting deadlines, monitoring progress and assessing learner work against the assessment criteria.

Centres use the ISM Model Assignment exactly as they receive it, with no amendments. The Model Assignment will be sent to centres on request.

## **Route C: Contextualised Model Assignment**

A Contextualised Model Assignment gives centres the opportunity of adapting the Model Assignment, to tailor it to the needs and interests of the centre or learners. For example the centre may change the setting of the Model Assignment from a car sales situation to a pharmaceuticals sales situation. A Contextualised Model Assignment must enable learners to meet all of the assessment criteria for the unit and must be approved by the ISM in advance of issuing it to learners.

## **Route D: Centre Devised Assignment**

Centres can create their own Centre Devised Assignment from scratch using the ISM Assignment Template. A Centre Devised Assignment must enable the learner to meet all of the assessment criteria for the unit and must be approved by the ISM in advance of issuing it to learners. The assignment may consist of one or more tasks.

Centres choosing this route must ensure that each Centre Devised Assignment:

- permits the learner to meet all of the assessment criteria in the unit
- is relevant to the content of the unit
- has clear instructions to the learner as to what is expected
- has clear instructions to the learner regarding the duration of the assignment (if it is a timed activity), and what reference or other material they may use (if any) to complete it
- contains language free from any bias
- contains language and technical terms at the appropriate level for the learner

## **1.18 Recognition of Prior Learning and Achievement**

Within this suite of qualifications, learners have the opportunity to build their achievements from a single unit into a composite qualification. Learners may apply via their centre to claim for credit transfer and exemption where they have completed relevant units and qualifications from other Awarding Organisations. Credit transfer in the RQF will be based on confirmation of achievement of RQF units.

There will still be instances where learners will wish to claim recognition of prior learning which has not been formally assessed and accredited. In those instances, centres are free, after discussion and agreement with the ISM, to allow these learners direct access to the relevant assessment for the unit, without unnecessary repetition of learning. Details of the process for recording such RPL (Recognition of Prior Learning) are available from the ISM.

## 1.19 Centre approval

Centres must pass through the ISM centre approval process to become an ISM Recognised Centre before offering any RQF qualifications. An application form is available on request please email [education@ismprofessional.com](mailto:education@ismprofessional.com).

## 1.20 Support and guidance for centres

Each centre is allocated an ISM External Quality Assurer whose role is to support and advise all of the centres in the region as well as to verify assessment decisions. The External Quality Assurer will contact the centre at the Centre Approval stage so that support may start immediately.

A handbook is provided to centres to give guidance on administrative procedures.

Study guides tailored to each unit are available to support learners.

For up to date details of the above support, visit the ISM website at [www.ismprofessional.com](http://www.ismprofessional.com).

## 1.21 Equality of opportunity

The ISM endeavours in setting the structure and content of our qualifications, and in its processes and arrangements for assessment and awarding, to:

- Ensure access and equality of opportunity wherever possible without affecting the integrity of the qualification
- Not create unnecessary barriers to achievement.
- Guarantee fair assessment for all candidates, including those with particular assessment requirements.
- Comply with the requirements of equalities legislation in force from time to time
- Ensure that it does not discriminate on the grounds of race, disability, gender and transgender, political or religious belief, age, marital/civil partnership status, sexual orientation, or on any other ground or status
- Ensure that all staff and associates are aware of the policy and receive adequate training to ensure its implementation and compliance

# Section 2

## Units

### Unit U201: Understanding laws and ethics of selling

Unit aim				This unit aims to support learners in understanding the legal and ethical requirements in sales and understand the consequences of non-compliance for individuals, organisations and customers.	
Level:	2	ISM Unit no.	U201	RQF unit reference no.	Y/502/7482
Credit Value	3	TQT	30	Guided Learning Hours	24
Mapping to National Occupational Standards				Sales NOS 7.8	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Understand the laws affecting selling	1.1. Identify the laws affecting selling in an organisation  1.2 Describe how the laws affect selling in an organisation	1.1 Main laws and their affects in you sector, GDPR)  1.2 Organisation responsibility to ensure products/services meet legal requirements and their salespeople are aware and compliant with sales and consumer protection legislation  1.3 Consequences such as investigations by industry

	1.3 Describe the consequences for self, organisation and customer if legal requirements are not complied with	watchdogs, fines, imprisonment, loss of license, reputation and business
2. Understand the ethics of selling	2.1 Describe the qualities of an ethical sales person	2.1 Ethical qualities honesty, fairness, trustworthy, professional
	2.2 Describe the benefits of selling ethically	2.2 Ethical benefits (enhances trust attracts investment, builds sales through customer loyalty, high staff morale)
	2.3 Describe the importance of industry codes of conduct	2.3 Codes of good practice in different sectors set out expected behaviour of professionalism – ISM code of conduct for salespeople
	2.4 Describe the consequences for self, organisation and customer if a salesperson behaves unethically	2.4 Loss of trust, bad reputation, lost sales, high staff turnover

## Unit U301: Preparing and delivering a sales presentation

Unit aim				<p>This unit aims to provide the necessary skills for preparing, developing and delivering sales presentations (or pitches) including considering the customer's needs and preparing a presentation to meet those needs.</p> <p>Candidates should be able to give a sales presentation to suit the customer and meet pre-defined objectives. The presentation should provide opportunities for questions to be asked. The presentation is likely to be made to a single customer as a sales pitch, but could be made to a group of customers.</p>	
Level:	3	ISM Unit no.	U301	RQF unit reference no.	R/502/7500
Credit Value	5	TQT	50	Guided Learning Hours	40
Mapping to National Occupational Standards				Sales NOS 5.3	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Be able to prepare a sales presentation	1.1 Identify the needs of the customer	Know about your organisation, the industry, the competition, your products/services, qualifying criteria, identify the main contact (MAN ; money, authority, need.) Know about your potential customer, their organization, products, customers, people, buying processes. Gather information from different sources including talking to the customer.

	<p>1.2 Set objectives for the sales presentation ensuring they reflect the customer's needs and interests</p> <p>1.3 Assess the likely physical situation for the presentation and identify the most appropriate method of presentation</p> <p>1.4 Identify and evaluate resources for delivery of the presentation</p> <p>1.5 Prepare a presentation that includes unique selling propositions</p>	<p>Set clear achievements for the presentation. SMART objectives (Specific, Measurable, Achievable, Realistic and Timed) Features and benefits (FAB), Unique selling point (USP) tailored to the specific customer requirements</p> <p>Awareness of the physical location, resources available and number of people attending to decide best presentation method</p> <p>Identify appropriate resources based on presentation method. PowerPoint, video, brochures, price lists, physical product for demonstration</p> <p>Structure presentation to follow a clear logical order that will deliver your objectives  1. State and clarify the customer's situation  Check and probe for agreement.  2. Outline the likely impact of these challenges and benefits to be achieved to the organisation and people of resolving the identified issues.  3.State the applicable benefits of your product/service that will enable the customer to achieve his requirements. Check and gain commitment.</p>
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<p>2. Be able to deliver a sales presentation</p>	<p>2.1 Deliver a presentation</p> <p>2.2 Provide the customer with opportunities to ask questions and raise objections</p> <p>2.3 Listen and respond to questions from the customer</p> <p>2.4 Gain commitment to proceed to the next stage of the sale</p>	<p>Personal presentation, body language, build initial rapport Deliver the presentation in the clear logical order you prepared</p> <p>Ensure customer engagement and commitment throughout by using active listening and questioning skills Proactively encourage customer to ask questions so any concerns can be aired and dealt with</p> <p>Listen carefully to what the customer is saying, don't assume ask for clarification, provide answers and confirm satisfaction</p> <p>Confirm understanding and commitment throughout ensuring the final commitment/conclusion is a natural agreed resolution</p>
<p>3. Be able to evaluate a sales presentation</p>	<p>3.1 Evaluate the presentation to identify lessons learnt which can be applied to future presentations</p>	<p>Assess your performance against the set objectives for the presentation. What prevented you from sticking to your presentation plan? What will you do differently next time and why.</p>

## Unit U302: Handling objections, negotiating and closing sales

Unit aim				This unit aims to provide the skills to handle and overcome sales objections and to negotiate in order to be able to close the sale effectively in a way that is mutually beneficial to both the customer and own organisation.	
Level:	3	ISM Unit no.	U302	RQF unit reference no.	Y/502/7501
Credit Value	6	TQT	60	Guided Learning Hours	50
Mapping to National Occupational Standards				Sales NOS 7.5, 7.6	

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Be able to prepare to handle objections, negotiate and close the sale	<p>1.1 Plan to deal with a range of sales objections prior to dealing with the customer</p> <p>1.2 Confirm authorisation to negotiate and prepare a negotiation plan</p> <p>1.3 Identify methods of closing the sale</p>	<p>Research common sales objections understand the customer's reasons for raising them. Understand where in your presentation you should ensure they are addressed Active listening – Agree understanding of customer concern, clarify, offer solution. Use could and follow with would. If we could provide training would that satisfy you concern. Where you can use Feel Felt Found (FFF)</p> <p>Negotiation plan, Like. Intend, Must (LIM) Scope of own authority and responsibility.</p> <p>Asking for the order should be a natural conclusion to the sale provided all concerns have been unearthed and deal with satisfactorily</p>

<p>2. Be able to handle objections</p>	<p>2.1 Identify any issues that are preventing the customer agreeing the sale</p> <p>2.2 Explore issues with the customer to identify and prioritise concerns</p> <p>2.3 Provide evidence to the customer of the strengths of the company's products or services</p> <p>2.4 Confirm that the customer is in agreement with how the objection(s) can be overcome</p> <p>2.5 Respond to verbal and non-verbal buying signals</p>	<p>Ongoing open and probing questions during the presentation, gaining commitment at each stage before moving onto the next.</p> <p>More probing and challenging questions to extract the impact of their main issues. Be respectful of genuine customer concerns</p> <p>Create value by matching those features and benefits of your product/service that will solve their issues and allay their concerns</p> <p>Gain confirmation from the customer that you have been able to overcome his concerns and he agrees with the solution you propose</p> <p>Active listening and observation to be able to respond appropriately to verbal and non-verbal buying signals</p>
<p>3. Be able to negotiate with the customer</p>	<p>3.1 Carry out negotiation according to plan</p> <p>3.2 Inform the customer when no further adjustment is available</p>	<p>Have your negotiation plan prepared. Use LIM (like, intend, must). Think about what issue will be of most importance to the other party.</p> <p>Plan for trade-offs and stick to your plan in terms of what you must achieve</p>
<p>4. Be able to close the sale</p>	<p>4.1 Apply a trial close</p>	<p>Ask the customer a confirmation question/s.</p>

	<p>4.2 Respond to any further objections and concerns</p> <p>4.3 Use questions to identify potential opportunities for add-ons, up-selling or cross-selling</p> <p>4.4 Close the sale and summarise agreements</p>	<p>Restate the benefits and the customer's affirmations. Isolate any lingering objection, if we agree a solution will you move forward with the sale?</p> <p>Restate the customer's affirmations back to him. Summarise what you have agreed and ask for the order</p>
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## Unit U303: Understanding influences on buyer behaviour

Unit aim				<p>This unit aims to provide the knowledge and understanding necessary to enable the sales person to respond to different members of the decision-making unit, whether in consumer markets or organisational markets.</p> <p>Knowledge of buyer behaviour enables the sales person to identify appropriate methods of contact and present appropriate solutions depending on who is involved in the sales decision.</p>	
Level:	3	ISM Unit no.	U303	RQF unit reference no.	D/502/7502
Credit Value	3	TQT	30	Guided Learning Hours	24
Mapping to National Occupational Standards				Sales NOS 9.3	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Understand buyer decision making processes and their impact on the sales cycle	1.1 Explain how the consumer buying decision-making process affects the sales cycle	<p>Buyer behaviour and motivation. Consumer buying decision-making process (DMP): Identification of need, Finance, Evaluation of alternatives, Trial, Negotiate, Purchase, Evaluate the purchase.</p> <p>Influences on domestic consumer buying behaviour: Frequency, Importance, Socio-economic category, Logic and emotion, third party influences, Buying environment.</p> <p>Sales cycle. Basic supply chain. Integration of supply chain into marketing and not simply downward channel to user.</p>

	<p>1.2 Explain how the organisational buying decision-making process affects the sales cycle</p> <p>1.3 Explain how each role of the decision-making unit impacts on the sales cycle</p>	<p>Motivational theories such as Maslow's Hierarchy of Needs</p> <p>Business to business (B2B) commercial decision-making process (DMP). More people involved in decision and often high cost sales makes the sales cycle more complex.</p> <p>Decision-making unit (DMU). Financier, User, Influencer, Buyer, Initiator, Decider, Gatekeeper</p>
<p>2. Understand how to respond to the buyer at each stage of the decision-making process</p>	<p>2.1 Describe how to differentiate between and respond to each member of the decision-making unit in a sales situation</p> <p>2.2 Describe how to present solution(s) to meet the needs and wants of each member of the decision-making unit</p>	<p>Behaviours, actions and words of Financier, User, Influencer, Buyer, Initiator, Decider, Gatekeeper Personality types and associated behaviours</p> <p>Present solutions showing how needs and wants for each member of the DMU are met.</p>

## Unit U304: Understanding customer segmentation and profiling

Unit aim				This unit aims to build on the understanding of customer groups through profiling/segmentation activities	
Level:	3	ISM Unit no.	U304	RQF unit reference no.	K/502/7504
Credit Value	4	TQT	40	Guided Learning Hours	32
Mapping to National Occupational Standards				Sales NOS 9.1	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Understand how to identify customer groups	<p>1.1 Describe methods of identifying customer groups</p> <p>1.2 Compare the characteristics of customers in identified customer groups</p>	<p>Consumer customer segmentation bases: Demographic (quantitative data), Psychographic (qualitative data), Geographic, Behavioural, Product/Services awareness Lifestyle.</p> <p>B2B segmentation bases: Geographic, Size, Sector Classification Code (SIC), Company age, Personal characteristics of buyers, Usage rates, buying criteria.</p> <p>Consumer bases example, demographics: look at age, sex, occupation income etc.</p> <p>B2B bases example Size look at turnover, staff, buying criteria.</p>

<p>2. Understand the motivations, attitudes and behaviours of customers in identified customer groups</p>	<p>2.1 Describe the motivations, attitudes and behaviours of customers in identified customer groups</p> <p>2.2 Describe clusters of customers who have distinct similarities in their motivations, attitudes and behaviours</p>	<p>Application of motivation theories including Maslow</p> <p>Groups with distinguishable similarities in their motivations, attitudes and behaviours</p>
<p>3. Understand how to profile existing customer groups</p>	<p>3.1 Identify the characteristics of established customers</p> <p>3.2 Describe the similarities between identified established customers</p> <p>3.2 Explain how to develop profiles for customer groups</p>	<p>Identify distinguishing characteristics of existing customer groups.</p> <p>Describe similar features of these customer groups Ensure research is sufficient to justify conclusions</p> <p>A consumer customer profile will include customer demographics, information on buying patterns, and psychographic characteristics, which help determine why customers buy and their lifestyle preferences.</p> <p>For business-to-business markets (B2B), the sources of information that help you profile customers will come from existing sales data and other published information such as SIC (Standard Industrial Classification) code.</p> <p>CRM- analyse patterns and trends identify opportunities such as upselling and cross selling</p>

## Unit U305: Understanding sales and marketing in organisations

Unit aim				This unit aims to provide the knowledge and understanding about the factors that can cause conflict between sales and marketing departments. It also provides an understanding of the ways in which collaboration can benefit both departments and the organisation.	
Level:	3	ISM Unit no.	U305	RQF unit reference no.	M/502/7505
Credit Value	4	TQT	40	Guided Learning Hours	32
Mapping to National Occupational Standards				Sales NOS 4.5, Marketing NOS 7.4.2	

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Understand various organisational structures and their impact on the roles of those in sales and marketing	1.1 Explain a range of business orientations  1.2 Differentiate between various organisational structures  1.3 Explain the impact of organisational structure and business orientation on the relationship between sales and marketing roles	Business orientations: Product, Production, Sales, Marketing, Social  Organisational structures: Types of organisation charts showing employee rank and position/roles  Marketing orientation v sales orientation Organisation structure with distinct Sales function or Sales

		function operating under Marketing
2. Understand the roles of sales and marketing personnel	<p>2.1 Explain the roles of sales personnel</p> <p>2.2 Explain the roles of marketing personnel</p>	<p>Understanding of the roles of sales personnel including:</p> <ol style="list-style-type: none"> <li>1 Sales Directors</li> <li>2 Key account managers</li> <li>3 Sales Executives</li> </ol> <p>Face to face customer interaction, business development, account management, telesales.</p> <p>Understanding of the roles of marketing personnel including:</p> <ol style="list-style-type: none"> <li>1. Marketing Directors</li> <li>2 Marketing manages</li> <li>3. Digital marketing managers</li> <li>4. Marketing executives</li> <li>5. Designers</li> </ol> <p>Market research, marketing campaigns, design-packaging, brand, website, promotions</p>
3. Understand the importance of collaboration between sales and marketing departments	3.1 Explain the factors that can cause conflict between sales and marketing departments	Organisational relationship between marketing and sales practices. Conflicts and misunderstandings about the importance of activities. Sales as an internal aspect of marketing. Internal communications.

	<p>3.2 Explain the consequences to the organisation of sales and marketing departments not working collaboratively</p> <p>3.3 Explain the ways in which sales and marketing departments can support each other</p> <p>3.4 Explain the benefits of sales and marketing departments working collaboratively</p>	<p>Implications of not satisfying customers, lost sales Sales people not properly supported</p> <p>Provide clear information to promote understanding. Effective and regular communication. Feedback.</p> <p>Sense of common purpose. Implications of satisfying customers. Benefits for customers, sales team, marketing team, organisation.</p>
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## Unit U306: Using market information for sales

Unit aim				This unit aims to provide the knowledge and skills needed to obtain and analyse information that helps to understand the markets that are sold into.	
Level:	3	ISM Unit no.	U306	RQF unit reference no.	T/502/7506
Credit Value	5	TQT	50	Guided Learning Hours	40
Mapping to National Occupational Standards				Sales NOS 1.1, 1.2	

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Understand the importance of obtaining and storing sales-related information	1.1 Explain the importance of having up-to-date information to support sales activities  1.2 Explain the importance of reviewing data requirements for current and future use	Monitor external environment PESTLE Sector, competitor, product knowledge Knowledge and expertise builds trust and rapport with customer  Data from the latest markets trends, consumer trends, competition offerings, as well as past sales performance and previous consumer behaviours, needs and reactions to market offerings. Reviewing this data will inform marketing, support sales decisions and identify opportunities

	1.3 Explain how to ensure that the sales-related information is stored safely and securely and is accessible when needed	Organisational policy on data storage. Data protection. Legal and ethical issues of use of sales-related information. GDPR compliant
2. Be able to obtain sales-related information about customers, markets and competitors	<p>2.1 Identify the information needed to develop knowledge about the organisation's markets, customers and competitors</p> <p>2.2 Identify sources of information about the organisation's markets, customers and competitors</p> <p>2.3 Gather information about the organisation's markets, customers and competitors</p>	<p>Identify relevant information, on sector, competitors, own organisation policies, customers and product knowledge.</p> <p>Sector bodies, Industry bodies, Sector magazines, internet, Company's house, networking events, colleagues, Competitor websites and sales brochures</p> <p>Extract relevant information, list and update as required. Add to company database/CRM</p>
3. Be able to use analytical tools and methods to provide sales-related information	<p>3.1 Select and use a variety of analytical tools and methods to analyse sales-related information</p> <p>3.2 Present your analysis of sales-related information</p>	<p>Know how to use appropriate software packages for analysing and presenting sales-related information. CRM systems and reporting</p> <p>Identify trends in sales-related data.</p> <p>Identify the target audience for each category of sales-related information and communicate it effectively.</p> <p>Present data as coherent and useful sales intelligence.</p>

## Unit U307: Time and territory management for salespeople

Unit aim				This unit aims to provide the knowledge and skills needed to plan use of time and plan sales calls to enable you to meet your sales targets, and to develop a plan to manage sales within a sales territory	
Level:	3	ISM Unit no.	U307	RQF unit reference no.	A/502/7507
Credit Value	6	TQT	60	Guided Learning Hours	48
Mapping to National Occupational Standards				Sales NOS 2.4, 2.7, 2.8, 5.4	

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Be able to manage own use of own time	1.1 Log actual time spent on activities over a set period and classify activities  1.2 Set goals which are specific, measurable, attainable, realistic and time- bound  1.3 Identify and classify activities needed to achieve goals  1.4 Organise time for activities to give the best opportunity to achieve goals  1.5 Build in time for obligations and unforeseen inevitable interruptions	Complete daily activity sheet over a week split into 15- or 30-minute intervals  Identify work objectives, set SMART goals  Set tasks to achieve your goals that are small, manageable and specific  Only put tasks on your daily to do list. Prioritise, number them and add target achievement time  Allow time for urgent requests and other unforeseen activities

	1.6 Use techniques for managing work requests which are not high-priority	Delegate, share, trade off tasks with other team members or negotiate tasks with line manager. Consolidate, postpone, mechanise, simplify tasks. Importance of saying No.
2. Be able to develop a sales call plan	<p>2.1 Prioritise customer and prospects list based on sales revenue and sales potential</p> <p>2.2 Calculate the time to spend on high, medium and low priority customers and prospects</p> <p>2.3 Select the most appropriate method of contacting each customer or prospect</p> <p>2.4 Describe the purpose of each call, ensuring the call gives value to the customer or prospect and to the salesperson</p>	<p>Personal sales targets appropriate to customer base. List customers and prospects in terms of potential value and probability of a sale.</p> <p>Determine the time available to spend on each customer and prospect.</p> <p>Contact methods: phone, in person, email. Awareness of when a call will suffice and when a visit is required. Making an appointment ahead of a sales call.</p> <p>Know what you want to achieve from each contact. Knowledge of the sales cycle to structure and progress sales contacts. Plan purpose of call. Use of CRM</p>
3 Be able to develop a plan to manage sales within a sales territory	<p>3.1 Use analysis of organisation's products/services, market segments, competition, trends and profiles of key accounts to set goals</p> <p>3.2 Develop a strategy for a mix of customers and prospects in a</p>	<p>Access historical information about customers, products, competitors and markets to make informed decisions in setting goals.</p> <p>What extra revenue can you raise from existing customers, what level of new business will</p>

	<p>geographic or named account territory</p> <p>3.3 Analyse the potential turnover, profit and growth potential of a sales territory</p> <p>3.4 Analyse opportunities and threats within a sales territory</p> <p>3.5 Develop a plan to include territory objectives, strategy, tactics and action points.</p>	<p>be required and what product mix will give the best results.</p> <p>Information about number, size and location of customers. Calculate anticipated gross income, expenditure, profit, growth potential.</p> <p>SWOT analysis on customers and prospects Competitor SWOT</p> <p>Develop a plan to achieve sales targets, consider the frequency and level of sales activity required and build in allowances for potential problems.</p> <p>Identify key resource requirements for implementation of plan.</p> <p>Establish key monitoring, control and key performance indicators to measure the success of the plan.</p> <p>Anticipate potential problems to challenge achievement of sales plan and find solutions to problems.</p> <p>Balance benefits against risks of implementing plan.</p> <p>Short, medium and long-term plans</p>
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## Unit U308: Planning for professional development

Unit aim				This unit enables learners to develop knowledge and skills for managing own professional development to enhance career progression	
Level:	3	ISM Unit no.	U308	RQF unit reference no.	Y/502/5652
Credit Value	2	TQT	20	Guided Learning Hours	15
Mapping to National Occupational Standards				Sales NOS 4.9	

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Know how to identify strengths and needs for own role	1.1 Describe skills, qualities and experience which are needed in own role  1.2 Using appropriate tools and techniques identify own strengths for own role  1.3 Using appropriate tools and techniques identify own needs for own role	Knowledge of job description and personal specification. Understanding of how own role fits into achievement of organisational strategies. Personal qualities.  Skills SWOT Identification of personal qualities needed eg attitude, ability to adapt to change, motivation, aptitudes.  Gap analysis of current and required skills and knowledge

<p>2. Understand opportunities for professional development</p>	<p>2.1 Describe own professional needs</p> <p>2.2 Explain opportunities available for professional development</p>	<p>Organisation and personal values, career and wider personal aspirations. Steps needed to develop own skills and competences.</p> <p>Learning experiences that are mutually beneficial to self and organisation.</p> <p>In-house and external training, learning zones within organisations, induction, coaching, shadowing, self-study, mentoring, projects, professional bodies, volunteering, qualifications, life-long learning</p>
<p>3. Be able to produce a professional development plan</p>	<p>3.1 Complete a professional development plan</p>	<p>Professional development objectives appropriate to needs of self, job role and organisation.</p> <p>SMART objectives: specific, measurable, achievable, realistic and time-bound</p> <p>Skills audit, targets and action plan.</p>

## Unit U309: Prospecting for new business

Unit aim				This unit aims to enable the learner to source sales leads and achieve an initial appointment with the decision-maker.	
Level:	3	ISM Unit no.	U309	RQF unit reference no.	F/502/7508
Credit Value	4	TQT	40	Guided Learning Hours	30
Mapping to National Occupational Standards				Sales NOS 7.1	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Be able to plan to prospect for new business	1.1 Prepare an action plan for finding information needed  1.2 Source information to identify potential sales leads  1.3 Prepare a time plan with the number of contacts required to meet targets	Qualification criteria for prospects to identify who is a prospect Identify methods of finding qualified prospects through sector/market information. Awareness of Data Protection legislation.  Social media; creating a personal brand, engage with relevant online groups, blogs etc. Use engaging content to create interest and pull in leads. Networking, sector information, marketing, internet, trade journals.  Understand conversion rates, prospect to leads to customers.

	1.4 Prepare a dialogue framework including the questions to ask to find the information needed	Product/service features and benefit statements. Open, closed and probing questions. Identification of decision maker, needs and budget. Demonstrate value. Commitment questions. Potential customer concerns.
2 Be able to analyse information to create a list of prospects and suspects	2.1 Analyse information against your criteria for qualifying sales leads as prospects and suspects  2.2 Record information about prospects and suspects	Use your qualification criteria to move suspects to prospects  Relevant information use of CRM or other method for systematic approach
3. Be able to make appointments with prospects	3.1 Identify a person or people to meet within an organisation  3.2 Make contact with prospects to arrange to meet  3.3. Prepare for the appointments	Decision-maker and influencer. Understand DMU (decision making unit)  How to approach gatekeepers, any common connections through Linked-in etc. Knowledge of information that may be of interest.  Confirm meeting in writing. Organisation/person research. Plan as in 1.4

## Unit U310: Sales pipeline management

Unit aim				This unit aims to enable the sales person to pro-actively manage the sales cycle to convert potential customers into actual customers and to close sales. The sales person needs to accurately forecast sales, manage time, analyse potential conversions from leads to closed sales and focus time and energy on most likely conversions.	
Level:	3	ISM Unit no.	U310	RQF unit reference no.	J/502/7509
Credit Value	6	TQT	60	Guided Learning Hours	48
Mapping to National Occupational Standards				Sales NOS 3.5, 7.1, 7.2	

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Understand the importance of pipeline management	<p>1.1 Describe pipeline management reporting for the individual sales person, the sales person's line manager and the organisation</p> <p>1.2 Describe issues which complicate pipeline management</p> <p>1.3 Describe own sales process, including contact types and milestones</p>	<p>The visibility of pipeline to self, manager and organization to ensure right volume at every stage to enable targets to be met. Identification of bottlenecks, sales training requirements.</p> <p>Qualification criteria not met, insufficient information gathered, slow follow up, bottlenecks-prospects not moving through pipeline. Low value prospects. Slow sales cycle, Insufficient prospects.</p> <p>Sales process you follow, lead generation, qualification criteria, information gathered, sale presentation, needs</p>

		identification, selling value and closing
2. Be able to analyse conversion ratios to prioritise time spent on prospects	<p>2.1 Identify conversion ratios for Prospect to Customer, Lead to Customer and Proposal to Customer</p> <p>2.2 Analyse current conversion ratios for Prospect to Customer, Lead to Customer and Proposal to Customer</p> <p>2.3 Evaluate prospects at regular intervals against criteria in each step of sales process</p> <p>2.4 Evaluate likelihood of converting prospects into customers and prioritise time and effort to be spent on each prospect</p>	<p>Use information from pipeline to identify your conversion ratios from lead through to closing the deal.</p> <p>From your conversion ratios identify where in the pipeline you are experiencing the greatest challenges and plan to deal with these</p> <p>Your lead cannot be moved to the next stage if criteria is not met, for example has the decision maker been identified, do they have a need and the budget</p> <p>Use sales volume and likelihood of success to determine who and how often contact should be made. Who to remove from the pipeline.</p>
3. Be able to use sales tools to move prospects through the sales pipeline	<p>3.1 Identify sales tools needed to move prospects through the pipeline</p> <p>3.3 Use sales tools to move prospects through the pipeline</p>	<p>Lead generation tools, marketing materials, lead qualifying checklists, sales presentation, CRM.</p> <p>Lead generation, qualification criteria, pipeline monitoring</p>