SPECIFICATION

IAO LEVEL 2 CERTIFICATE FOR TRANSITION TO WORKING IN SALES AND MARKETING

QUALIFICATION NUMBER: 603/6388/5

Innovate Awarding is an Ofqual regulated awarding organisation with an innovative and dynamic approach. We develop off-the-shelf, customised and fully bespoke qualifications across a growing number of sectors – all on the Regulated Qualifications Framework (RQF).

Our portfolio is always growing and we currently have qualifications in the following sectors:

Active Leisure	**Health and Social Care**
Business and Management	**Hospitality and Catering**
Childcare	**IT**
Employability	**Logistics**
Retail	**Education and Training**

We currently offer over 100 qualifications and we're continuously developing and diversifying our portfolio. Please visit our website regularly to keep up-to-date www.innovateawarding.org.

This document will be updated if there are any changes, so it is important to make sure you are working from the most up-to-date version, which is available to download from our website.

This specification also provides details on administration, quality assurance policies and the requirements as well as responsibilities that are associated with the delivery of vocational qualifications.

Innovate Awarding is an Ofqual-regulated Awarding Organisation in England.

If you have any questions regarding qualifications in general, aspects of specific qualifications or our quality assurance policies and procedures, visit our website where a lot more information is available.

If you cannot find what you are looking for on our website, please call or email our customer support team:

Telephone: 0117 314 2800
Email: contactus@innovateawarding.org

"We work with a wide variety of organisations such as employers, training providers, FE colleges and Sector Skills Councils and develop off-the-shelf, customised and bespoke qualifications."

Qualification summary

Qualification Accreditation Number (QAN)	603/6388/5
Qualification review date	31.07.2024
Guided Learning Hours (GLH)	100
Total Qualification Time (TQT)	130
RQF level	2
Qualification credit value	13 credits
Minimum credits at/above level	13 credits
Assessment requirements	Portfolio of Evidence, Multiple Choice Examination
	This qualification is internally assessed and internally quality assured by Centre staff and externally quality assured by Innovate Awarding External Quality Advisors (EQAs).
Aims and objectives of the qualification	The aim of this qualification is to prepare learners for work. It supports the development of knowledge and skills to enable learners to prepare for work and identify the skills and behaviours required within a professional environment. It provides an insight into the principles and processes of sales and marketing and has been designed to support transition into employment for those seeking to work in a sales or marketing role. It is designed to meet the skills needs of employers of all sizes across the public, private and not-for-profit sectors.
Entry guidance	There are no formal entry requirements for this qualification.
	This qualification is suitable for those who are preparing to work in sales and marketing positions across a variety of sales related industries.
Progression opportunities	Learners who achieve this qualification could progress into further education or employment in a sales and marketing role.

On completion of this course, Learners may progress to:
- IAO Level 2 NVQ Certificate in Sales
- IAO Level 3 NVQ Diploma in Sales
- IAO Level 2 Certificate in Principles of Sales
- IAO Level 3 Certificate in Principles of Sales

Funding

For details on eligibility for government funding please refer to the following websites:
http://www.education.gov.uk/section96/
https://www.gov.uk/government/organisations/education-and-skills-funding-agency

Innovate Awarding

When you work with Innovate Awarding, you're working with an awarding organisation that sets itself apart – a dynamic company with a collaborative approach to doing business. We're consultative and innovative…everything that our customers say they want an awarding organisation to be.

We're easy to work with, committed and passionate about exceeding our customers' expectations. We're not tied down by bureaucracy and red tape and can think outside the box and respond quickly to our customers' needs.

We have a Performance Pledge that details guaranteed response times. Copies of these can be found on our website www.innovateawarding.org.

Feedback

Your feedback is very important to us. We're always open to suggestions when it comes to enhancing and improving our services, products and systems. Email us at contactus@innovateawarding.org or call us on 0117 314 2800.

Complaints

If we do get things wrong, we'll make every effort to resolve your issues quickly and efficiently. If you'd like to raise a formal complaint then we recommend you read our Complaints Procedure which can be found on our website.

Fees

Our fees structure is transparent and straightforward. Our fees are published on our website in a clear format with no hidden charges. Unlike other awarding organisations, we do not charge an annual centre fee. Visit our website to compare our fees.

Enquiries and appeals

We recognise that sometimes decisions are made that a centre (or learner) may wish to appeal. We have an Enquiries and Appeals Policy and Process on our website that sets out guidelines on grounds for appeal and the process.

Data Protection

Innovate Awarding takes the protection of data seriously; we have a data protection statement outlining how we and our centres, comply with the current legislation on data protection. This statement can be found on our website.

Equality and Diversity

Innovate Awarding is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation (Equality Act 2010) and EU directives.

Centres are required, as conditions of approval, to use an equality and diversity policy that works together with ours and that they maintain an effective complaint and appeals process. We expect centres to tell learners how to find and use their own equality and diversity and appeals processes. For information, please visit our website.

Reasonable Adjustment and Special Consideration

All learners must be treated fairly and equally and be given every opportunity to achieve our/the qualifications. A copy of our policy on Reasonable Adjustments and Special Considerations, and application form, can be found on our website.

Malpractice and Maladministration

Innovate Awarding has a responsibility to do everything it can to prevent any malpractice or maladministration from occurring, and where it has already occurred, ensuring action is taken proportionate to the gravity and scope of the occurrence.

A copy of our policy and procedure on Malpractice and Maladministration is available on our website.

Recognition of Prior Learning (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification or unit. Innovate Awarding have produced guidance on RPL and this can be found within our Information and Guidance for Centres on our website.

Please note the above is not a comprehensive guide to running qualifications. Once approved centres must adhere to the Centre Agreement and Information and Guidance for Centres.

The Regulated Qualifications Framework (RQF)

What is the RQF?

The Regulated Qualifications Framework (RQF) is an Ofqual regulated system of cataloguing qualifications. Qualifications on the RQF can be found by their size or level. Qualifications at a given level can differ depending on their content and purpose.

All of Innovate Awarding's qualifications are on the RQF.

Qualification Level

The level reflects the challenge or difficulty of the qualification. There are eight levels of qualification from 1 to 8, supported by three "Entry" levels.

Qualification Size

The size of a qualification reflects the estimated total amount of time it would take the average learner to study and be assessed. The size of a qualification is expressed in terms of Total Qualification Time (TQT). The time spent being taught or supervised, rather than studying alone, is the Guided Learning Hours (GLH).

Qualifications can sit at different levels, but require similar amounts of study and assessment. Similarly, qualifications at the same level can take different amounts of time to complete.

Rules of combination

To achieve this qualification, learners must gain 5 credits from the mandatory units and a minimum of 8 credits from units in the optional bank.

The minimum guided learning hours for this qualification is 100.

*These units are assessed by multiple choice examination

Mandatory units

Unit ref	Unit title	Level	Credit value	GLH
H/501/5917	Preparing for an interview	2	1	10
J/501/5893	Applying for a job	2	1	10
J/618/3737	Effective skills, qualities and attitudes for learning and work	2	3	22

Optional units:

Unit ref	Unit title	Level	Credit value	GLH
J/618/3740	Teamworking skills	2	3	20
F/618/3655	Principles of how to sell a product or service	2	1	10
A/502/8205	Understanding sales techniques and processes	2	5	40
K/503/8194	Principles of customer relationship	2	3	18
D/502/9928	*Principles of marketing theory	2	4	30
R/618/3739	Building working relationships with customers	2	2	20

Mandatory units:

Title:	H/501/5917 Preparing for an interview
Level:	2
Credit Value:	1
GLH:	10
Learning Outcomes **The learner will:**	**Assessment Criteria** **The learner can:**
1. Be able to anticipate key questions that they might be asked at the interview	1.1 Suggest key types of questions that an interviewer might ask
2. Be able to prepare answers to anticipated interview questions	2.1 Prepare appropriate answers to the key questions most likely to be asked by an interviewer
3. Know how to use information about the job/course to identify questions to ask the interviewer	3.1 Find out key information about the employer/organisation/course and explain why it is useful for the interview 3.2 Identify what information they do not have about the job/placement/course which they could request at the interview
Additional information	
Unit aim (s)	This unit focuses on the role of the learner in correctly anticipating and preparing key information, questions and answers for a potential interview.

Title:	J/501/5893 Applying for a job
Level:	2
Credit Value:	1
GLH:	10

Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Be able to access different methods of applying for a job	1.1 Investigate different methods of applying for a job
2. Be able to prepare a job application	2.1 Collate the appropriate information for a job application 2.2 Prepare a thorough job application
3. Be able to present the job application appropriately	3.1 Select and use the conventions, formats and styles of presenting job applications appropriately
4. Be able to reflect on the appropriateness of the job application	4.1 Evaluate the suitability of the style and information in the job application in relation to its intended audience

Additional information	
Unit aim (s)	This unit aims to equip learners with the skills to access and respond to different types of job application opportunities. Learners will gain an understanding of how to present a job application in an appropriate way.

Title:	J/618/3737 Effective skills, qualities and attitudes for learning and work
Level:	2
Credit Value:	3
GLH:	22

Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand a range of positive qualities, attitudes and behaviours for learning and work	1.1 Explain the importance of positive qualities, attitudes and behaviours for employment 1.2 Describe appropriate codes of conduct 1.3 Describe the importance of: • adaptability and flexibility • motivation • enthusiasm • commitment • professionalism 1.4 Reflect on their positive qualities, attitudes and behaviours for learning and work
2. Understand why effective communication is important	2.1 Explain the importance of effective verbal and non-verbal communication 2.2 Describe how to communicate effectively face-to-face with colleagues or customers 2.3 Describe how to communicate effectively with colleagues or customers who are not present 2.4 Explain ideas using technical language where appropriate 2.5 Give examples of different forms of written communication and when they are used 2.6 Describe the possible impact of inappropriate use of social network sites
3. Be able to work effectively	3.1 Identify the tasks that need to be done and the deadlines 3.2 Produce a plan for the working day 3.3 Work safely following health and safety guidelines 3.4 Carry out multiple tasks or projects 3.5 Complete tasks to required standard and deadlines 3.6 Reflect on their work and identify ways of working more effectively
Additional information	

Unit aim (s)	The aim of this unit is to help the learner to be able to demonstrate positive qualities, attitudes and behaviours for learning and work, and to communicate and work effectively.

Optional Units:

Title:	J/618/3740 Teamworking skills
Level:	2
Credit Value:	3
GLH:	20

Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand why effective teamwork is important	1.1 Define effective teamwork 1.2 Describe the advantages and disadvantages of teamwork for a given situation
2. Understand the roles people may take in a teamwork situation	2.1 Give examples of formally allocated roles 2.2 Give examples of less formal roles 2.3 Describe the impact these roles could have on the way a team works and on members of the team
3. Understand the role of conflict	3.1 List factors that could contribute to conflict in a team 3.2 Explain how conflicting views could be an advantage 3.3 Suggest ways to manage and resolve conflict
4. Understand what needs to be done to achieve a particular goal	4.1 Explain the overall goal and objectives of the team 4.2 Identify their own strengths, skills and experiences relevant to the teamwork situation 4.3 Describe their own role as part of the team
5. Be able to work with others towards achieving shared objectives	5.1 Agree an action plan of individual and group activities needed to achieve the objectives 5.2 Clarify action plan if necessary 5.3 Identify who to ask for help if needed 5.4 Carry out the individual and group activities as agreed 5.5 Motivate the team to achieve its objectives 5.6 Provide feedback in an appropriate and constructive manner 5.7 Receive and respond to constructive feedback
6. Be able to reflect on own performance and that of the team	6.1 Reflect on their own performance and the performance of the team

	6.2 Suggest ways of improving own team working skills
Additional information	
Unit aim (s)	The aim of this unit is to help the learner understand the roles people may take within teams and be able to work with others towards achieving shared objectives.

Title:	F/618/3655 Principles of how to sell a product or service
Level:	2
Credit Value:	1
GLH:	10

Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the buying needs and interests of customers	1.1 Identify customers': • requirements • needs • and interests 1.2 Identify which aspects of products or services can match customers identified needs
2. Understand how to promote the features and benefits of products or services to customers	2.1 Explain the features and benefits of products or services to show how they can meet customers' requirements 2.2 Identify any possible queries or objections that a customer might have 2.3 Identify ways of helping customers overcome their queries and objections 2.4 Identify terms of sale that might meet both the requirements of your customers and business
Additional information about this unit	
Unit aim (s)	To support the development of skills customer requirements and promote the benefits of products or services when starting a business.

Title:	A/502/8205 Understanding sales techniques and processes
Level:	2
Credit Value:	5
GLH:	40

Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the sales cycle	1.1 Describe the characteristics of the sales cycle 1.2 Explain how the different stages of the sales cycle affects the approach to the sale 1.3 Describe the use of the sales cycle in: • structuring • progressing • sales contacts
2. Understand the buyer decision-making process	2.1 Describe an organisation's procedures for dealing with buyers 2.2 Explain how buyer behaviour affects the achievement of targets 2.3 Explain the distinction between customer wants and needs 2.4 Explain the difference between consumer buyer decision-making and business-to-business decision-making 2.5 Describe the pressures on customers that influence their buying behaviour
3. Understand how to generate and qualify sales leads	3.1 Explain how to segment customers 3.2 Explain how to target market customers and prospects 3.3 Describe how to source and gather information about the market and the prospect 3.4 Explain the process for qualifying the sales contact 3.5 Explain the importance of accurate record keeping
4. Understand how to sell by inbound telephone call	4.1 Explain the characteristics of inbound telephone selling 4.2 Describe the advantages and disadvantages of inbound telephone selling

	4.3	Explain the characteristics of reactive selling
	4.4	Describe the following techniques that are most suited to telephone selling: • verbal • listening • questioning
	4.5	Describe how to manage customer behaviour during inbound calls
	4.6	Describe how to interpret the customer's reaction as the sale progresses during inbound calls
	4.7	Describe how to involve the customer in closing the sale during inbound calls
5. Understand how to sell by outbound telephone call	5.1	Describe the preparations to be made prior to telephone selling
	5.2	Explain the characteristics, of outbound telephone selling
	5.3	Explain the advantages and disadvantages of outbound telephone selling
	5.4	Explain the characteristics of proactive selling
	5.5	Describe how to manage customer behaviour during outbound calls
	5.6	Describe how to interpret the customer's reaction as the sale progresses during outbound calls
	5.7	Describe how to involve the customer in closing the sale during outbound calls
6. Understand the principles of selling face to face	6.1	Explain the characteristics of face to face selling
	6.2	Explain the advantages and disadvantages of face to face selling
	6.3	Explain the importance of preparing for the contact
	6.4	Describe the stages of selling face to face
	6.5	Describe how to manage customer behaviour during face to face sales contacts
	6.6	Describe how to interpret the customer's reaction as the sale progresses during face to face contacts
	6.7	Describe how to involve the customer in closing the sale during face to face contacts
7. Understand how to close a sale	7.1	Explain how to overcome objections

	7.2	Explain how to identify the following buying signals: • verbal • non-verbal
	7.3	Explain how to overcome barriers to closing the sale
	7.4	Explain how to identify further potential: • add-on • up-selling • cross-selling opportunities prior to closing the sale
	7.5	Describe different methods of closing sales
8. Understand how to process sales orders	8.1	Describe the process for ordering products and/or services
	8.2	Describe an organisation's payment methods
	8.3	Describe the requirements of customer credit checks
	8.4	Explain the role of the despatch function
	8.5	Describe order completion service standards
	8.6	Describe the importance of discounts and special offers
	8.7	Describe the importance of keeping the customer informed of developments relating to their order
Additional information		
Unit aim (s)	This unit concerns understanding the sales cycle, the buyer decision-making process, how to generate and qualify sales leads, how to sell by inbound and outbound telephone calls, how to sell face to face, how to close a sale and how to process sales orders.	

Title:	K/503/8194 Principles of customer relationships
Level:	2
Credit value:	3
GLH:	18

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand customers and their needs	1.1 Describe the importance of understanding customers' wants and needs 1.2 Explain the role of segmentation in identifying customers' likely wants and needs 1.3 Describe the factors that motivate customers to buy 1.4 Explain the importance of seeking customer feedback on: • performance • products and/or services
2. Understand an organisation's responses to customer relationships	2.1 Describe an organisation's marketing objectives and activities 2.2 Explain the importance of developing customer service plans and customer relationship plans 2.3 Describe an organisation's system for relationship management 2.4 Describe an organisation's customer care programme 2.5 Describe the system for communicating with customers 2.6 Explain the importance of a consistent level of service 2.7 Explain the link between customer satisfaction and sales growth 2.8 Explain the importance of using customer feedback to enhance: • performance • products and/or services
3. Understand the principles of customer relationship management	3.1 Explain the concept and principles of relationship management 3.2 Explain the importance of keeping promises made to customers

	3.3 Explain the importance of balancing customers' needs with those of the organisation
	3.4 Explain the importance of keeping customers informed of:
	• progress
	• problems
	• issues
	• and the actions
	undertaken in support of them
	3.5 Explain how to identify added value that could be offered to customers
Additional information about this unit	
Unit aim (s)	This unit concerns understanding customers and their needs, organisations' responses to customer relationships and customer relationship management

Title:	D/502/9928 Principles of marketing theory
Level:	2
Credit value:	4
GLH:	30
TQT:	40

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to segment the market	1.1 Explain the importance of defining market segments 1.2 Describe the difference between: • market segments • customer classifications 1.3 Explain how to cluster customers with similar characteristics 1.4 Describe how a range of products may appeal to different market segments 1.5 Describe the importance of valid and reliable marketing data to segmenting the market 1.6 Explain the strengths and weaknesses of different marketing data collection methods 1.7 Describe the use of Customer Relationship Management (CRM): • activities • systems
2. Understand the value of marketing	2.1 Describe the role of marketing in enhancing the sale of products and/or services 2.2 Explain the significance of customer loyalty to the achievement of marketing objectives 2.3 Explain the role of performance indicators and evaluation arrangements 2.4 Describe the factors to be taken into account when assessing the cost and value of marketing activities 2.5 Explain the significance of brand and reputation to sales performance

3. Understand the principles of socially responsible marketing	3.1 Explain the scope and purpose of socially responsible marketing
	3.2 Explain the importance of involving stakeholders in socially responsible marketing activities
	3.3 Explain how core values are expressed through:
	• coherent branding
	• chosen communication methods
	3.4 Explain the requirements of socially responsible marketing campaigns
Additional information about this unit	
Unit aim (s)	This unit concerns understanding how to segment the market, the value of marketing and the principles of socially responsible marketing

Title:	R/618/3739 Building working relationships with customers
Level:	2
Credit Value:	2
GLH:	20

Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand how a customer's or client's interactions with employees influence their opinion of an organisation as a whole	1.1 Explain how an employee's self-presentation can affect a customer's opinion of the individual and their organisation 1.2 Explain why keeping customers satisfied is important to organisations
2. Understand why organisations normally have protocols for dealing with customers	2.1 Describe the key areas likely to be contained in a customer service protocol 2.2 Explain why it is important for employees to follow customer service protocols
3. Be able to interact positively with customers in line with given protocols	3.1 Follow protocols to provide answers to commonly occurring customer query requests 3.2 Communicate appropriately with customers 3.3 Explain the procedures within an organisation for dealing with customer problems and complaints 3.4 Describe when it would be necessary to involve colleagues in assisting the customer
Additional information	
Unit aim (s)	In this unit the learner will be introduced to the concept of customer service standards and the way in which organisations ensure their delivery through the use of protocols.