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# Handbook

RPD3 – VTCT (Skillsfirst) Level 3 NVQ Diploma in  
Recruitment (RQF)

600/8282/3

Version 5

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# About Skillsfirst

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

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

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

For more information visit us at [www.vtct.org.uk](http://www.vtct.org.uk) and [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk), contact our dedicated Customer Support Team via email at [customersupport@vtct.org.uk](mailto:customersupport@vtct.org.uk) and [customerservices@skillsfirst.co.uk](mailto:customerservices@skillsfirst.co.uk) or call 0121 270 5100

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# 1 Qualification at a glance

<b>Qualification title</b>	VTCT (Skillsfirst) Level 3 NVQ Diploma in Recruitment (RQF)
<b>Qualification number</b>	600/8282/3
<b>Product code</b>	RPD3
<b>Age range</b>	There are no age limits attached to learners undertaking this qualification unless this is a legal requirement of the process or the environment
<b>Credits</b>	41
<b>Total Qualification Time (TQT)</b>	410
<b>Guided Learning (GL) hours</b>	188
<b>Assessment</b>	To be awarded this qualification, learners must successfully achieve the following assessments: <ul style="list-style-type: none"><li>• Portfolio of evidence</li><li>• Skills-based assessment (if applicable)</li></ul>
<b>Entry requirements</b>	There are no formal entry requirements for learners undertaking this qualification; however centres must ensure that learners have the potential and opportunity to gain evidence for the qualification in the work place.
<b>Support materials</b>	Support materials can be found on the website (if applicable)

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## 2 Qualification information

### 2.1 Qualification aim and design

This qualification has been designed for the recruitment consultant who is progressing in their career and has a good range of knowledge and experience. At this level they will be required to demonstrate autonomy in completing tasks, organising activities and contributing to decision making.

### 2.2 Progression opportunities

Learners who achieve this qualification will be able to progress on to the Level 4 Diploma in Principles of Recruitment Practice (RQF), the Level 4 NVQ Diploma in Recruitment (RQF), into employment, or progress onto the following Skillsfirst qualifications:

- VTCT (Skillsfirst) Level 5 NVQ Diploma in Management (RQF)
- VTCT (Skillsfirst) Level 5 Diploma in the Principles of Management and Leadership (RQF)

or similar higher level qualifications.

## 3 Qualification structure

To be awarded the VTCT (Skillsfirst) Level 3 NVQ Diploma in Recruitment (RQF) learners must achieve all mandatory units. All **41** credits must be achieved, of which a minimum of **13** credits must be from optional units.

The minimum TQT required to achieve this qualification is **410**.

Product code	Unit title	Level	Credit	Unit reference number
<b>Mandatory units (Group M): 28 credits</b>				
REC1	Identify client recruitment requirements	3	3	T/504/6962
REC2	Pre-select candidates	3	3	F/504/6964
REC3	Assess candidates	3	3	L/504/6966
REC4	Match and present candidates to employers	3	4	R/504/6967
REC5	Attract potential candidates	3	3	K/504/6974
REC6	Brief and support candidates	3	3	T/504/6967
REC7	Carry out candidate debriefing	3	4	A/504/6977
REC8	Administer recruitment processes	2	2	F/504/6978
TLD1	Develop working relationships with colleagues	2	3	H/600/9660

Product code	Unit title	Level	Credit	Unit reference number
<b>Optional units (Group O): minimum 13 credits</b>				
REC9	Advise clients on operational recruitment planning	4	4	M/504/6961
REC10	Develop resourcing plan for recruitment services	3	4	A/504/6963
REC11	Sustain customer-focused relationships with clients	3	6	D/504/6969
REC12	Co-ordinate flexible workers	3	6	J/504/6979
REC13	Conduct market research	3	6	H/502/9929
REC14	Analyse competitor activity	3	3	Y/502/9927
SA301	Negotiating, handling objections and closing sales	3	4	F/502/8612
SA304	Buyer behaviour in sales situations	3	3	K/502/8622
SA307	Preparing and delivering a sales presentation	3	4	L/502/8631
SA303	Developing sales proposals	4	5	A/502/8656
MA3	Develop, maintain and review personal networks	4	4	R/600/9587

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## 4 Centre requirements

### 4.1 Resources

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

### 4.2 SkillsCfA

The Level 3 NVQ Diploma in Recruitment (RQF) is based on the units developed by the SkillsCfA who are the sector skills council for recruitment. Their contact details are:

6 Graphite Square  
Vauxhall Walk  
London  
SE11 5EE

Phone 020 7091 9620

info@skillscfa.uk.org

This handbook provides details from SkillsCfA's assessment strategy, which centres will need to apply in order to assess and quality assure the Level 3 NVQ Diploma in Recruitment (RQF) and includes the:

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

The complete assessment strategy is available for view and to download from the SkillsCfA website [www.skillscfa.org](http://www.skillscfa.org)

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

Assessors and internal verifiers (IVs) are appointed by the recognised centre and approved by Skillsfirst through the external verifier (EV). Assessors and IVs should:

- have verifiable relevant experience and current knowledge of the occupational working area at, or above, the level they are assessing or verifying. This experience and knowledge must be of sufficient depth to be effective and reliable when judging learner competence or verifying assessment processes and decisions. This could be verified by:
  - curriculum vitae and references
  - possession of a relevant qualification
  - corporate membership of a relevant professional institution
- have sufficient occupational expertise so they have up to date knowledge and experience of the particular aspects of work they are assessing or verifying. This could be confirmed by records of continuing professional development (CPD) achievements
- be prepared to participate in training activities for their CPD
- have a sound in-depth knowledge of, and uphold the integrity of, the National Occupational Standards (NOS), units of assessment and the people1st assessment principles

- be employed directly or contractually by the same centre as the learner or
- be acting as a counter signatory on a short-term basis for a maximum period of 18 months, where the assessor/IV has not achieved the relevant award

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

#### 4.3.1 Internal verifiers

The IV is responsible for the approved centre's assessment quality. Therefore, in addition to the above, IVs must also:

- provide evidence of knowledge, understanding and application of the regulatory authorities' code of practice
- undertake CPD to ensure that they are working to the current NOS in assessment and verification
- only verify the decisions of assessors which fall within their acknowledged area of technical and occupational competence

Internal verifiers will either:

Hold an appropriate quality assurance qualification, such as D34 or V1, or an appropriate TAQA qualification or be working towards an appropriate quality assurance qualification.

- IVs working towards their qualification should achieve the qualification within 18 months of beginning their internal verification duties
- IV decisions, by those still working towards their qualification, must be countersigned by a fully qualified IV

All new IVs must hold recognised assessor units.

or:

Where employers opt for an 'employer direct' model (described below) the qualification requirement may be waived. It is desirable that all IVs hold a relevant qualification.

#### 4.3.2 Assessors

Assessors should only assess in their area of technical and occupational competence, approved by Skillsfirst.

Assessors will either:

Hold an appropriate assessor qualification, such as D32/33 or A1/2, or an appropriate TAQA qualification, or be working towards an appropriate assessor qualification.

- those working towards an appropriate assessor qualification should achieve the qualification within 18 months of beginning assessment duties
- assessment decisions, by those still working towards an appropriate assessor qualification, must be countersigned by a qualified assessor

or:

Where employers opt for an 'employer direct' model (described below) the qualification requirement may be waived.



#### 4.4 Employer direct model

Where employers opt for an 'employer direct' model, the qualification requirements for assessors and internal verifiers may be waived.

The employer direct' model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process. Under this model, the employer, with the agreement of Skillsfirst and SkillsCfA may choose between:

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

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

#### 4.5 Continuous professional development (CPD)

Centres are responsible for ensuring that assessors and IVs plan and maintain their CPD.

Centres are expected to support their assessors and IVs in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

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

#### 4.6 Total Qualification Time (TQT)

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

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# 5 Assessment

## 5.1 Summary of assessment methods

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

## 5.2 Assessment principles

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

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

## 5.3 Characteristics of assessment guidance

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

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

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

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

### 5.3.1 Professional discussion

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

## 5.4 Simulation and witness testimony

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

### 5.4.1 Simulation

Simulation can only be used to assess learners where the opportunity to assess naturally occurring evidence is unlikely or not possible, for example assessment relating to health and safety, fire and emergency procedures. It should not include routine activities that must be covered by performance evidence. There are no units that can be solely achieved by simulation. In the case of imported units, where simulation is acceptable in the evidence requirements, it should only be used when performance evidence is unlikely to be generated through normal working practices

### 5.4.2 Witness testimony

Skillsfirst recognise the use of witness testimony and expert witness testimony as appropriate methods for assessors to collect evidence on candidate's performance.

Witness testimonies can be obtained from people that are occupationally competent and who may be familiar with the national occupational standards, such as the learner's line manager. They may also be obtained from people who are not occupationally competent and do not have a knowledge of the national occupational standards such as other people within the learner's workplace, customers and suppliers.

The assessor must judge the validity of the witness testimony and these may vary depending on the source. Witness testimonies can only support the assessment process and may remove or reduce the need to collect supplementary evidence. However, centres must comply with Skillsfirst guidance over the occupational competence and briefing of witnesses in the use of witness testimony.

## 5.4 Recognition of prior learning (RPL)

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

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

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

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

In summary, evidence submitted to the RPL process must:

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

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# 6 Units

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# Unit Handbook

## REC1 – Identify client recruitment requirements

Unit reference number: T/504/6962

**Level: 3**

**Credit value: 3**

**Guided Learning (GL) hours: 10**

### Unit aim

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

### Learning outcomes

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

LO1 Confirm clients' staffing requirements

LO2 Analyse the role requirements of staff sought

LO3 Confirm recruitment arrangements with clients

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to CfA Rec2 - Contact hirers and establish recruitment requirements and Rec4 - Obtain, prepare and promote job vacancies.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

### REC1 Document History

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



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# Unit Handbook

## REC2 – Pre-select candidates

Unit reference number: F/504/6964

**Level: 3**

**Credit value: 3**

**Guided Learning (GL) hours: 10**

### Unit aim

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

### Learning outcomes

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

LO1 Shortlist candidates

LO2 Present pre-selected candidates to clients

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to CfA Rec6 - Assess job-seekers and Rec7 - Review job-seekers' progress and close vacancies.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

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# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

## REC2 Document History

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

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# Unit Handbook

## REC3 – Assess candidates

Unit reference number: L/504/6966

**Level: 3**

**Credit value: 3**

**Guided Learning (GL) hours: 20**

### Unit aim

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

### Learning outcomes

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

LO1 Plan candidate assessments

LO2 Carry out candidate assessments

LO3 Understand the basis for choosing selection methods and media

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to CfA Rec6 - Assess job-seekers.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

### REC3 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator



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# Unit Handbook

REC4 – Match and present candidates to employers

Unit reference number: R/504/6967

**Level: 3**

**Credit value: 4**

**Guided Learning (GL) hours: 30**

## Unit aim

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

## Learning outcomes

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

LO1 Develop and maintain a candidate database

LO2 Match candidates

LO3 Present candidates to clients

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to CfA Rec6 - Assess job-seekers and Rec7 – Review job-seekers' progress and close vacancies.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

#### REC4 Document History

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

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# Unit Handbook

## REC5 – Attract potential candidates

Unit reference number: K/504/6974

**Level: 3**

**Credit value: 3**

**Guided Learning (GL) hours: 20**

### Unit aim

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

### Learning outcomes

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

LO1 Plan candidate attraction activities

LO2 Implement candidate attraction activities

LO3 Build relationships with candidates

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to CfA Rec3 - Attract and maintain relationships with job-seekers

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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 (ADIA))
	2.7 Ensure all recruitment advertising, materials and processes meet legal and ethical requirements

Learning Outcome	Assessment Criteria
LO3 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

### REC5 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator



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# Unit Handbook

REC6 – Brief and support candidates

Unit reference number: T/504/6976

**Level: 3**

**Credit value: 3**

**Guided Learning (GL) hours: 15**

## Unit aim

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

## Learning outcomes

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

LO1 Identify candidates' needs

LO2 Brief candidates on employer requirements

LO3 Support candidates

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to CfA Rec3 - Attract and maintain relationships with job-seekers.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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 requirement

Learning Outcome	Assessment Criteria
LO3 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)

### REC6 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator

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# Unit Handbook

REC7 – Carry out candidate debriefing

Unit reference number: A/504/6977

**Level: 3**

**Credit value: 4**

**Guided Learning (GL) hours: 20**

## Unit aim

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

## Learning outcomes

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

LO1 Review candidates' progress

LO2 Exchange feedback with candidates

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to CfA Rec7 - Review job-seekers' progress and close vacancies.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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 requirements

### REC7 Document History

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



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# Unit Handbook

REC8 – Administer recruitment processes

Unit reference number: F/504/6978

**Level: 2**

**Credit value: 2**

**Guided Learning (GL) hours: 20**

## Unit aim

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

## Learning outcomes

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

LO1 Administer the recruitment process

LO2 Administer the selection process

LO3 Administer the appointment process

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to: Administer the recruitment and selection process.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

### REC8 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator

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# Unit Handbook

TLD1 – Develop working relationships with colleagues

Unit reference number: H/600/9660

**Level: 2**

**Credit value: 3**

**Guided Learning (GL) hours: 15**

## Unit aim

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

## Learning outcomes

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

LO1 Understand the benefits of working with colleagues.

LO2 Be able to establish working relationships with colleagues.

LO3 Be able to act in a professional and respectful manner when working with colleagues.

LO4 Be able to communicate with colleagues.

LO5 Be able to identify potential work-related difficulties and explore solutions.

---

# Unit content

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

This unit directly relates to MSC D1 Develop productive working relationships with colleagues.

## Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Management Standards Centre.

## Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

## Assessment guidance

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questions, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the benefits of working with colleagues	1.1 Describe the benefits of productive working relationships

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 Be able to act in a professional and respectful manner when working with colleagues	3.1 Explain how to display behaviour that shows professionalism

Learning Outcome	Assessment Criteria
LO4 Be able to identify potential work-related difficulties and explore solutions	4.1 Identify information to others clearly and concisely
	4.2 Explain how to receive and clarify own understanding of information

Learning Outcome	Assessment Criteria
LO5 Be able to communicate with colleagues	5.1 Identify potential work-related difficulties and conflicts of interest
	5.2 Explain how to resolve identified potential difficulties

### TLD1 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator



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# Unit Handbook

## REC9 – Advise clients on operational recruitment planning

Unit reference number: M/504/6961

**Level: 3**

**Credit value: 4**

**Guided Learning (GL) hours: 15**

### Unit aim

This unit concerns understanding the nature of human resource planning, defining clients' strategic recruitment needs and evaluating the effectiveness of the recruitment strategy.

### Learning outcomes

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

LO1 Understand human resource planning

LO2 Define clients' operational recruitment needs

LO3 Understand the basis for choosing recruitment methods and media

LO4 Analyse the effectiveness of the recruitment solutions

---

# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is not directly linked to the above.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 Understand the basis for choosing recruitment methods	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

Learning Outcome	Assessment Criteria
LO4 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

### REC9 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator

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# Unit Handbook

## REC10 – Develop resourcing plan for recruitment services

Unit reference number: A/504/6963

**Level: 3**

**Credit value: 4**

**Guided Learning (GL) hours: 15**

### Unit aim

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

### Learning outcomes

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

LO1 Agree with clients how recruitment needs will be met

LO2 Develop a recruitment resourcing plan

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is directly linked to the CfA Rec1 - Develop a resourcing strategy and Rec4 - Obtain, prepare and promote job vacancies.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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



### REC10 Document History

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

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# Unit Handbook

## REC11 – Sustain customer-focused relationships with clients

Unit reference number: D/504/6969

**Level: 3**

**Credit value: 6**

**Guided Learning (GL) hours: 30**

### Unit aim

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

### Learning outcomes

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

LO1 Understand networking tools to create relationships with clients in recruitment

LO2 Build and sustain relationships with clients in recruitment

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is directly linked to the CfA Rec2 - Contact hirers and establish recruitment requirements.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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”

Learning Outcome	Assessment Criteria
LO2 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

### REC11 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator

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# Unit Handbook

## REC12 – Co-ordinate flexible workers

Unit reference number: J/504/6979

**Level: 3**

**Credit value: 6**

**Guided Learning (GL) hours: 40**

### Unit aim

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

### Learning outcomes

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

LO1 Place flexible workers with clients

LO2 Manage clients' bookings for flexible staff

LO3 Co-ordinate the needs of flexible workers

---

# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to CfA Rec8 - Co-ordinate and manage temporary workers.

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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



### REC12 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator

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# Unit Handbook

## REC13 – Conduct market research

Unit reference number: H/502/9929

**Level: 3**

**Credit value: 6**

**Guided Learning (GL) hours: 10**

### Unit aim

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

### Learning outcomes

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

LO1 Be able to identify the need for market research

LO2 Be able to design market research projects

LO3 Be able to manage market research data collection

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# Unit content

## **Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)**

This unit is linked to:

Marketing 1.2.1 Define the need for market research

Marketing 1.2.2 Design market research projects

Marketing 1.2.3 Implement programmes to collect market research data

Marketing 1.2.7 Collect data on the knowledge, attitudes and behaviours of target groups

## **Support of the unit by a sector or other appropriate body**

This unit is endorsed by SkillsCfA, the sector skills council for recruitment

## **Evidence requirements**

Learners must provide a portfolio of evidence for this unit.

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

### REC13 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator

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# Unit Handbook

## REC14 – Analyse competitor activity

Unit reference number: Y/502/9927

**Level: 3**

**Credit value: 3**

**Guided Learning (GL) hours: 3**

### Unit aim

This unit is about being able to identify competitor activity and determining the nature of the threat posed by competitors.

### Learning outcomes

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

LO1 Be able to identify competitor activity

LO2 Be able to determine the nature of the threat posed by competitor activity

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# Unit content

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

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

## Endorsement of the unit by a sector or other appropriate body

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

## Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

## Evidence requirements

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

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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



### REC14 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator

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# Unit Handbook

## SA301 – Negotiating, handling objections and closing sales

Unit reference number: F/502/8612

**Level: 3**

**Credit value: 4**

**Guided Learning (GL) hours: 22**

### Unit aim

This unit aims to provide the skills to handle and overcome sales objections in order to be able to close the sale.

### Learning outcomes

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

LO1 Understand how to handle objections and negotiate with the customer

LO2 Be able to prepare for objections and negotiation with the customer

LO3 Be able to handle objections

LO4 Be able to negotiate with the customer

LO5 Be able to close the sale following negotiation

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# Unit content

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

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

## Endorsement of the unit by a sector or other appropriate body

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

## Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

## Evidence requirements

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

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

Learning Outcome	Assessment Criteria
LO4 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

Learning Outcome	Assessment Criteria
LO5 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

### SA301 Document History

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

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# Unit Handbook

## SA304 – Buyer behaviour in sales situations

Unit reference number: K/502/8622

**Level: 3**

**Credit value: 3**

**Guided Learning (GL) hours: 27**

### Unit aim

This unit aims to provide the knowledge, understanding and skill necessary to enable the sales person to respond to different members of the decision-making unit, whether in consumer markets or organisational markets.

### Learning outcomes

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

LO1 Understand the impact of different models of buyer behaviour on the sales cycle.

LO2 Be able to respond to the buyer at each stage of the decision making process.

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# Unit content

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

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

## Endorsement of the unit by a sector or other appropriate body

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

## Functional Skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

## Evidence requirements

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



# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

### SA304 Document History

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

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# Unit Handbook

SA307 – Preparing and delivering a sales presentation

Unit reference number: L/502/8631

**Level: 3**

**Credit value: 4**

**Guided Learning (GL) hours: 28**

## Unit aim

This unit aims to provide the necessary skills for developing and delivering sales presentations.

## Learning outcomes

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

LO1 Understand the factors for consideration in the preparation of sales presentations

LO2 Be able to prepare a sales presentation

LO3 Understand how to deliver sales presentations

LO4 Be able to deliver a sales presentation

---

# Unit content

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

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

## Endorsement of the unit by a sector or other appropriate body

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

## Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

## Evidence requirements

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

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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 presentation
	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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

Learning Outcome	Assessment Criteria
LO4 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

### SA307 Document History

Version	Issue Date	Changes	Role
V1.0	31/01/2023	Re-branded	Qualification Administrator

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# Unit Handbook

## SA403 – Developing sales proposals

Unit reference number: A/502/8656

**Level: 4**

**Credit value: 5**

**Guided Learning (GL) hours: 30**

### Unit aim

This unit aims to provide the knowledge and skills for preparing sales proposals for customers.

### Learning outcomes

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

LO1 Understand how to write sales proposals.

LO2 Be able to develop sales proposals.

LO3 Be able to evaluate the proposal.



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# Unit content

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

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

## Endorsement of the unit by a sector or other appropriate body

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

## Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

## Evidence requirements

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

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 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

Learning Outcome	Assessment Criteria
LO3 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

### SA403 Document History

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

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# Unit Handbook

## MA3 – Develop, maintain and review personal networks

Unit reference number: R/600/9587

**Level: 4**

**Credit value: 4**

**Guided Learning (GL) hours: 25**

### Unit aim

This unit helps learners to develop, maintain and review networking relationships based on personal contacts.

### Learning outcomes

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

LO1 Understand the benefits of networking and the need for data privacy.

LO2 Be able to develop a personal network of contacts.

LO3 Be able to review networking relationships.

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# Unit content

## Assessment guidance

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questions, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

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

This unit directly relates to MSC A3 - Develop your personal networks.

## Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the CfA for the Management Standards Centre.

## Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

# Learning outcomes

Learning Outcome	Assessment Criteria
LO1 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

Learning Outcome	Assessment Criteria
LO2 Be able to develop a personal network of contacts	2.1 Develop and maintain networks that will provide personal and organisational benefit
	2.2 Develop guidelines for working with networks in line with organisational procedures

Learning Outcome	Assessment Criteria
LO3 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

### MA3 Document History

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

### RPD3 Document History

Version	Issue Date	Changes	Role
v5	08/02/2023	Formatting and re-branding. No content amendment.	Data Administrator