

**ILM LEVEL 2
CERTIFICATE IN
SALES MANAGEMENT**



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Institute of Leadership & Management (ILM)

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ILM LEVEL 2 CERTIFICATE IN SALES MANAGEMENT (QCF)

[Qualification No. – 500/5643/8]

Note: This qualification specification should always be read in conjunction with the “Supporting Notes for ILM VRQs” document which is downloadable from ILM website or it can be accessed via your Quality Manager/External Verifier or from the ILM Customer Services Team by emailing at customer@i-l-m.com

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QUALIFICATION OVERVIEW:

ILM Level 2 Certificate in Sales Management		
Purpose of the qualification	Aims to give practising or potential Sales Managers the foundation for their formal development in this role. The qualification does this by developing basic sales manager skills and assisting participants in gaining the basic knowledge required at this level.	
Progression routes	The qualification provides opportunities for progression to other qualifications such as the: <ul style="list-style-type: none"> • ILM Level 2 Certificate in Team Leading • ILM Level 3 Award, Certificate or Diploma in First Line Management 	
Credit Value	13	
Induction	1 hour	
Tutorial Support	At least 1 hour	
Guided Learning Hours (GLH) – this range is based on the guide learning defined for each unit and includes any additional time for induction and tutorial support:	40 hours	
To be completed within	3 years	
Structure	Mandatory Units (<i>Learners must complete the 3 mandatory units with a combined credit value of 6</i>)	Credit Value
	M2.30 Effectively selling to customers	2 credits
	M2.31 Understanding sales in the workplace	2 credits
	M2.32 Managing customer care	2 credits
	Optional Units (<i>Learners must achieve 7 credits from this group of which at least 2 credits have to be a level 2 bringing the total credit value of the qualification to 13 credits</i>)	Credit Value
	M2.03 Planning and monitoring work	2 credits
	M2.07 Fulfilling customer requirements	2 credits
	M2.08 Providing quality to customers	1 credit
	M2.13 Using resources efficiently in the workplace	1 credit
	M2.14 Communicating with people outside the work team	1 credit
	M2.17 Workplace information systems	1 credit
	M2.22 Dealing with customers lawfully	1 credit
	M3.01 Solving problems and making decisions	2 credits
	M3.03 Planning change in the workplace	2 credits
	M3.09 Giving briefings and making presentations in the workplace	1 credit
	M3.20 Planning to work efficiently	2 credits
	M3.30 Understanding the communication process in the workplace	1 credit
	M3.32 Communicating one-to-one at work	1 credit

OCCUPATIONAL COMPETENCY REQUIREMENTS FOR THE LEVEL 2 CERTIFICATE IN SALES MANAGEMENT

It is the centres responsibility to ensure that they have competent and suitably qualified staff involved in delivering, quality assuring and/or assessing qualifications.

The table below shows the occupational competence requirements of tutors, internal quality assurers and/or assessors. Given that occupational competence requirements will vary greatly between lower and higher level qualifications, this table will highlight if there is an additional requirement of any qualification specific occupational competency.

Tutors Occupational Competence Requirements	Evidence Indicators
A thorough knowledge and understanding of the qualification(s).	<ul style="list-style-type: none"> Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification. Demonstrate understanding of the Level 2 Award and Certificate in Team Leading, with the ability to deliver them across a variety of operational environments and sectors. Show evidence of information or documents prepared for learners such as a learner journey plan (SoW), lesson plan, learner guidance notes, tutorial support plan etc. for the ILM qualification. Show evidence of participation in Continuing Professional Development (CPD) in relation to the relevant field and qualification requirements.
Relevant and credible experience in the field of the relevant qualification.	<ul style="list-style-type: none"> Training, development and experience as a tutor, adviser and/or assessor in the team leading or managerial area. Be able to prove that they have current experience of delivering training appropriate to the level and subject area of the qualification
A qualification in support of assessment and internal quality assurance.	<ul style="list-style-type: none"> Ideally hold a valid and recognised teaching/training qualification.

Internal Quality Assurers and/or Centre Assessors Occupational Competence Requirements	Evidence Indicators
A thorough knowledge and understanding of the relevant qualification(s).	<ul style="list-style-type: none"> Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification. Show evidence of carrying out CPD in order to familiarise themselves with current standards for assessment/verification in the subject area of this qualification.
Relevant and credible experience in the field of the relevant qualification.	<ul style="list-style-type: none"> Demonstrate clear evidence of current experience in quality assurance and/or assessment appropriate to the level and subject area of this qualification
A qualification in support of assessment and/or internal quality assurance.	<ul style="list-style-type: none"> Ideally hold an assessment qualification (e.g. TAQA or equivalent)
Experience and a working knowledge of the operational and assessment processes for the relevant qualification.	<ul style="list-style-type: none"> Demonstrate an understanding of the organisation's management centric policies, procedures and practices. Demonstrate knowledge and understanding of ILM's quality assurance policy, procedures and requirements.

ASSESSMENT GUIDANCE FOR THE LEVEL 2 CERTIFICATE IN SALES MANAGEMENT

A brief introduction on ILM's Assessment Strategy can be found in *Supporting notes for ILM VRQs*. For detailed information, centres are encouraged to refer to the various assessment guides that are available from the ILM Customer Services Team at customer@i-l-m.com or refer to the Centre Manual (www.i-l-m.com/centres.aspx). This segment gives you specific guidance around assessments for the Level 2 Certificate in Sales Management.

Appendix B in this document outlines the assessments and mark sheets for the units in this qualification. Centres should use the prescribed assessments. However some flexibility is permitted. In exceptional circumstances and to meet a specific need a centre may deviate from the prescribed assessment subject to prior written approval from ILM. Equal opportunities issues are relevant to all units of study and these aspects should be explicitly addressed in the delivery and assessment of this programme. The table below gives a brief overview of the units and assessment(s):

Unit	Assessment
M2.30 Effectively selling to customers	Role-play
M2.31 Understanding sales in the workplace	Team Brief
M2.32 Managing customer care	Knowledge Review

Learners are likely to come from a variety of backgrounds, in that they will have had different training and work experiences, differing ambitions and opportunities, centres therefore can encourage learners to select topics for assessment in their own organisation and/or area of work, (or within another organisation if they are currently unemployed or self-employed). They should ensure learners are able to present their work as simple and clearly as possible. An approximate word count is given for each assessment. This should only be seen as a guide to help achieve a balanced piece of work.

Centres must ensure that learners adequately complete all sections of the assessment. To ensure all learning outcomes are assessed, section passes have been provided in the assessments. To assist this practice, ILM normally applies a pass mark of 50% in each section as reflecting a minimum pass. Centres must note that compensation between learning outcomes is not allowed in any QCF unit.

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A P P E N D I X - A

UNIT SPECIFICATIONS FOR THE LEVEL 2 CERTIFICATE IN SALES MANAGEMENT

Title:	Planning and monitoring work (M2.03)	
Level:	2	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand how to work within the organisation's policies, procedures and priorities	1.1 Identify <u>one</u> organisational policy that is relevant to the work of the team 1.2 Give <u>one</u> example of a target or objective that the team is working to achieve 1.3 Give <u>one</u> example of conflict or incompatibility between different targets or objectives in the workplace
2	Understand how to plan and allocate work	2.1 Explain how work is planned or allocated to meet the target or objective selected in 1.2 above 2.2 Describe <u>one</u> way of checking that team members understand what work is required of them
3	Understand how to monitor a team's work	3.1 List <u>two</u> ways to monitor the team's work 3.2 Describe <u>one</u> action the team leader could take to rectify performance that does not meet the required standard
Additional information about the unit		
Unit purpose and aim(s)		To develop an understanding of effective planning and monitoring of work as required by a practising or potential team or cell leader.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: D5
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management

Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Shared
Units available from		01/01/2008
Unit guided learning hours		8
Additional Guidance about the Unit		
Indicative Content:		
1	<ul style="list-style-type: none"> • Role and purpose of objectives and targets • Setting SMART work targets to meet customer specifications and organisational requirements • Causes of conflict and incompatibility between targets/objectives in the workplace • Distinction between policies and procedures • Working according to organisation's objectives, policies, procedures, and priorities 	
2	<ul style="list-style-type: none"> • The roles people play in a team • The importance of knowing individual team members' strengths in their work roles • Simple techniques for scheduling work, e.g. rotas/shifts • Effective methods of communication to give instructions and achieve performance standards • Supervised practice or simulation to develop the ability to communicate instructions effectively 	
3	<ul style="list-style-type: none"> • Methods to monitor actual performance against production targets and time-scales, and identify variances • Ways to ensure team members understand monitoring systems • Recording outputs/variances/actions • Types of quality standards and their purpose • Quality checks/inspections vs. standards • Taking remedial/corrective action • Progress chasing • Effective reporting back to manager 	

Title:	Fulfilling customer requirements (M2.07)	
Level:	2	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Know how to fulfil customer requirements		1.1 Identify any <u>two</u> internal and/or external customer groups and explain their differing expectations 1.2 List <u>two</u> established standards of service in the organisation 1.3 Explain how performance is measured against <u>one</u> of these established standards of service 1.4 Briefly describe <u>one</u> technique they could use to improve customer service or satisfaction 1.5 Briefly explain why it is important to exceed customer expectations
2 Understand the importance of collecting and analysing customer feedback		2.1 Explain the importance of customer feedback 2.2 Briefly describe <u>two</u> different methods of collecting formal and informal feedback 2.3 Collect and analyse simple feedback from customers 2.4 Depict customer feedback using a chart, graph or pictogram 2.5 Briefly describe the Data Protection Act and its implications for collecting, storing and using customer feedback
Additional information about the unit		
Unit purpose and aim(s)		To develop an understanding of fulfilling customer requirements as required by a practising or potential team or cell leader.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: F5 (ICS unit 31), F7 (ICS unit 37)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)

Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Restricted to ILM
Units available from	01/01/2008
Unit guided learning hours	9
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Own internal and external customers • How to recognise different types of customers, their expectations and needs • Nature and purpose of service standards • Awareness of service standards in own organisation • Simple performance indicators • Techniques for performance improvement to exceed customer expectations • Supervised practice or simulation to develop the ability to apply knowledge and skills in performance improvement
2	<ul style="list-style-type: none"> • Simple ways of initiating and obtaining customer feedback • Separating facts and opinions • Tabulating and analysing information • Creating and using visual presentations to enhance understanding <ul style="list-style-type: none"> • Charts • Graphs • Pictograms • The Data Protection Act and its implications for collecting, storing and using customer feedback

Title:	Providing quality to customers (M2.08)	
Level:	2	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Understand the importance of quality within the organisation		1.1 Explain the importance of quality to the customer 1.2 Explain the difference between quality assurance and quality control 1.3 Briefly describe one quality system relevant to the organisation
2 Know how to deliver quality within the organisation		2.1 Briefly describe <u>one</u> method of monitoring the quality of the team's work 2.2 Briefly describe <u>two</u> things the team could do to improve quality 2.3 Describe <u>one</u> way that the team could measure an improvement in quality
Additional information about the unit		
Unit purpose and aim(s)		To develop an understanding of providing quality to customers as required by a practising or potential team or cell leader.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: F5 (ICS unit 31), F7 (ICS unit 37)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Restricted to ILM
Units available from		01/01/2008

Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Quality and its importance to customers; difference between quality assurance and quality control • Simple quality systems relevant to own organisation • The use of quality standards • The costs of quality (prevention, inspection and failure) • Total Quality Management • Practical steps to quality – team approaches
2	<ul style="list-style-type: none"> • Practical steps to quality – team approaches • Simple tools for quality relevant to the organisation • Records for maintaining quality

Title:	Using resources efficiently in the workplace (M2.13)	
Level:	2	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Understand the importance of using physical resources effectively		1.1 Identify <u>one</u> material/consumable item and one capital item used in the workplace 1.2 Explain why it is important to have the appropriate level of physical resources in the workplace 1.3 Briefly describe how to obtain material/consumable items 1.4 Briefly explain <u>one</u> simple measure for the safe use and <u>one</u> simple measure for the efficient use of resources within the team
Additional information about the unit		
Unit purpose and aim(s)		To develop an understanding of the efficient use of physical resources as required by a practising or potential team or cell leader.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: D5
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Restricted to ILM and City & Guilds
Units available from		01/01/2008
Unit guided learning hours		7

Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Different types of physical resources used in the workplace • Importance of sufficient resources, and the implications of shortfalls • Methods to plan and procedures for obtaining the necessary resources • Methods of resolving problems/shortfalls in supply • Simple measures to ensure the safe and efficient use of resources within the team • Concepts of capital, consumable, fixed and variable costs as indicators of where team leader can make a difference • Compliance with organisational, legal and regulatory standards

Title:	Communicating with people outside the work team (M2.14)	
Level:	2	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand the importance of effective communication with people outside the team	1.1 Briefly describe <u>one</u> way that they could build effective working relationships with people outside the team
2	Understand how to present a positive impression to those outside the team	2.1 Explain why product/service knowledge is important in presenting a positive impression to those outside the team 2.2 Explain why it is important to observe legal, organisational and ethical rules when providing information to customers of own organisation 2.3 Briefly describe <u>two</u> communication skills that could improve the relationship with people outside the team 2.4 Give <u>one</u> example of a decision that they would refer to someone with more authority in the organisation
Additional information about the unit		
Unit purpose and aim(s)		To develop an understanding of communicating with people outside the team as required by a practising or potential team or cell leader.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: D1
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management

Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Restricted to ILM and City & Guilds
Units available from		01/01/2008
Unit guided learning hours		6
Additional Guidance about the Unit		
Indicative Content:		
1	<ul style="list-style-type: none"> Building and maintaining effective working relationships with those outside the team 	
2	<ul style="list-style-type: none"> When to refer outside the team How to create a positive impression Promoting positive relationships with customers Importance of product/service knowledge Communication skills, including: <ul style="list-style-type: none"> Questioning Active listening Informing Negotiating Importance of observing legal, organisational and ethical rules on providing information to customers 	

Title:	Workplace information systems (M2.17)	
Level:	2	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand the purpose of record keeping for the organisation	1.1 Give <u>two</u> reasons why the organisation needs to keep records
2	Understand how information is stored, indexed and retrieved	2.1 Briefly describe what spreadsheets and databases can be used for in the workplace 2.2 Briefly describe how <u>one</u> particular type of information relevant to the team is stored, indexed and retrieved (manual or electronic, as appropriate)
3	Understand the importance of confidentiality/security of records	3.1 Briefly describe why a team leader should ensure that information is kept secure and confidential 3.2 Briefly explain <u>two</u> things the team leader could do to ensure confidentiality/security of manual/electronic records as appropriate to own organisation
4	Understand how information is stored, indexed and retrieved	
Unit purpose and aim(s)		To develop an understanding of information systems as required by a practising or potential team or cell leader.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: F7 (ICS unit 37)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the		Institute of Leadership & Management

unit	
Availability for use	Restricted to ILM and City & Guilds
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> The purpose of record-keeping for the organisation
2	<ul style="list-style-type: none"> Storage, indexing and information retrieval systems (manual and electronic, as appropriate) to meet team and organisation's procedures How and where spreadsheets and databases can be used
3	<ul style="list-style-type: none"> Confidentiality/security of records (levels of access, backup, virus protection, legal aspects) Data Protection Act Methods of storage to maintain security and confidentiality

Title:	Dealing with customers lawfully (M2.22)	
Level:	2	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Understand the customer's rights and your team's responsibilities		1.1 List <u>two</u> rights of a customer in a contract with a supplier 1.2 Describe an organisation's responsibilities in collecting and storing information about customers 1.3 Briefly explain why it is important to maintain confidentiality 1.4 Briefly describe the organisation's procedures for dealing with complaints or problems 1.5 Give <u>one</u> example of a customer complaint or problem they would need to refer to someone with more authority
Additional information about the unit		
Unit purpose and aim(s)		To provide practising or potential team or cell leaders with the ability to deal with customers lawfully.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: F5 (ICS unit 31), F7 (ICS unit 37)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Restricted to ILM and City & Guilds
Units available from		01/01/2008
Unit guided learning hours		4

Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Customer rights arising from the law relating to contracts for the sale of goods and services • Warranties and codes of practice • Data Protection Act • Importance of maintaining confidentiality • Own organisation's procedures for dealing with complaints or problems • Limits of own authority and when to refer

Title:	Effectively selling to customers (M2.30)	
Level:	2	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Understand customers needs and requirements		1.1 Identify why previous sales were successful 1.2 Identify customer requirements by using a recognised question-based structure 1.3 Record and prioritise customer responses
2 Meet the customers needs and requirements		2.1 Briefly describe how to match a customers requirements with their organisation's relevant business solution(s) 2.2 Gain commitment from the customer by closing the sale
Additional information about the unit		
Unit purpose and aim(s)		To develop an understanding of effectively selling to customers.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: F17, F19
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Restricted to ILM and City & Guilds
Units available from		01/01/2009

Unit guided learning hours	7
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • How to recognise different types of customers, their expectations and needs • Questioning techniques and question-based structures • Listening techniques • Simple ways of initiating and obtaining customer feedback • Accurate and clear note taking • Method of prioritising
2	<ul style="list-style-type: none"> • Features, advantages and benefits • Unique Selling Points • Attention Interest Desire Action (AIDA) • Awareness of service standards in own organisation • Closing techniques • Objection handling • Signing a type contract

Title:	Understanding sales in the workplace (M2.31)	
Level:	2	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Understand the sales process		1.1 Outline the stages in the sales process 1.2 Explain how sales links to marketing within the workplace 1.3 Describe the difference between push and pull sales strategies
2 Understand the place of the sales team in achieving the organisation's objectives		2.1 Describe different strategies that can be used to achieve sales objectives 2.2 Identify how the accumulation of sales staffs targets formulate the organisation's target
Additional information about the unit		
Unit purpose and aim(s)		To develop an understanding of sales in the workplace.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: F18, F19
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Restricted to ILM
Units available from		01/01/2009
Unit guided learning hours		7
Additional Guidance about the Unit		

Indicative Content:	
1	<ul style="list-style-type: none"> • The stages of the sales process • How sales links to marketing within the workplace • The difference between push and pull sales strategies • Channels of distribution • The 7 “Ps” of marketing (product, price, place, promotion, people, process, physical evidence)
2	<ul style="list-style-type: none"> • Strategies that can be used to achieve sales objectives • Briefing the sales team • How the accumulation of sales targets formulate the organisation’s target • Ansoff strategies • PEST Analysis (political, economic, social, technological) • SWOT Analysis (strengths, weaknesses, opportunities, threats)

Title:	Managing customer care (M2.32)	
Level:	2	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Understand the benefits and barriers to good customer care		1.1 Give examples of good and bad service 1.2 Explain the benefits of good customer service 1.3 State barriers to good customer care
2 Understand how to deliver professional customer service		2.1 List five basic principles associated with good customer care 2.2 Explain how to satisfactorily deal with difficult customer behaviour (s) 2.3 Explain how to deal with complaints in own area of responsibility
Additional information about the unit		
Unit purpose and aim(s)		To develop an understanding of managing customer care.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: F17, F18, F19
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Shared
Units available from		01/01/2009
Unit guided learning hours		7
Additional Guidance about the Unit		

Indicative Content:	
1	<ul style="list-style-type: none"> • How to recognise the customer experience physical and emotional • Importance of customer service standards • Time management • Budgetary constraints • Levels of authority • Peoples skills
2	<ul style="list-style-type: none"> • Work within a customer care framework • Using neutral terminology • Personalise interactions • Be curious • Make positive choices • Deliver as agreed • Keep promises • Identify problems • Define solutions • Ensure complaints are resolved

Title:	Solving problems and making decisions (M3.01)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Know how to describe a problem, its nature, scope and impact	1.1 Describe a problem, its nature scope and impact
2	Know how to gather and interpret information to solve a problem	2.1 Gather and interpret information to identify possible solutions to a problem
3	Know how to solve a problem	3.1 Briefly summarise the options, providing facts and evidence, not just opinion 3.2 Use at least <u>one</u> simple decision making technique to evaluate options to arrive at the best solution
4	Know how to plan the implementation and communication of decisions	4.1 Plan the implementation and communication of the decision 4.2 Briefly discuss which monitoring and review techniques could be used to evaluate outcomes
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of solving problems and making decisions as required by a practising or potential first line manager.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: C2, C5, C6, F6 (ICS unit 32)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management

Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Restricted to ILM and City & Guilds
Units available from	01/01/2008
Unit guided learning hours	11
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Simple ways to recognise, investigate and analyse problems • Objective setting in relation to problem • Brainstorming and creative thinking techniques
2	<ul style="list-style-type: none"> • Difference between data and information • How to calculate and use simple averages and basic summary statistics • How to prepare and use grouped data and tables • Interpretation of charts and diagrams • Methods of indexing, referencing and structuring qualitative information
3	<ul style="list-style-type: none"> • How to evaluate options • The importance of adequate and relevant information for effective decision-making • Identification of what information is relevant to specific decisions • Simple decision making techniques
4	<ul style="list-style-type: none"> • Effective presentation of a case – ie, providing facts and evidence, not just opinion • Monitoring and review techniques to evaluate outcomes of problem solving activities

Title:	Planning change in the workplace (M3.03)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1	Understand the forces for change in an organisation	1.1 Identify the forces that may require own organisation to change by conducting a simple PESTLE and/or SWOT analysis
2	Understand planning for change in an organisation	2.1 Give an example of change required in the workplace reflecting the SWOT and/or PESTLE analyses 2.2 Use a technique for planning change within the context of the example given 2.3 Identify relevant human and financial factors in the consideration of change within the context of the example given 2.4 Explain how to communicate with and involve people to facilitate effective change
3	Understand continuous improvement in an organisation	3.1 Explain the importance of quality awareness and the need to continuously improve the organisation 3.2 Identify the organisation's quality standards 3.3 Use a continuous improvement tool or technique relevant to the workplace 3.4 Explain ways of involving the team in quality and continuous improvement 3.5 Discuss ways to evaluate continuous improvement activities
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of planning change as required by a practising or potential first line manager.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: C5
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills		Council for Administration (CfA)

council or other appropriate body (if required)	
Location of the unit within the subject/sector classification system	Business Management
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Restricted to ILM and City & Guilds
Units available from	01/01/2008
Unit guided learning hours	11
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Simple PESTLE analysis • Organisational SWOT analysis
2	<ul style="list-style-type: none"> • The principles of change management • Basics of system theory and process design • Methods of planning for change • Use of Gantt charts, network planning as tools for planning change • Identification of human and financial factors in the consideration of change • Differentiate between fixed and variable costs • The importance of communication and involving people to facilitate effective change
3	<ul style="list-style-type: none"> • The importance of quality awareness and the need to strive for continuous improvement • Service standards as appropriate to own organisation • Quality circles, benchmarking, Kaizen • The importance of commitment and loyalty to the organisation • Ways to involve people in quality and continuous improvement, including suggestion schemes/role models • Ways to evaluate continuous improvement activities

Title:	Giving briefings and making presentations in the workplace (M3.09)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Know how to conduct a briefing or presentation		1.1 Select appropriate information in line with the objectives of the briefing or presentation 1.2 Logically structure the content of the briefing or presentation 1.3 Introduce an appropriate management topic clearly 1.4 Use appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation 1.5 Present information clearly 1.6 Display confidence in the subject matter 1.7 Keep to time 1.8 Use feedback to check understanding 1.9 Design a simple evaluation form
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of briefing and presentation skills as required by a practising or potential first line manager.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Restricted to ILM and City & Guilds

Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Selection of relevant information content • How to plan and prepare effectively for briefings (account for Purpose; Audience; Content; Form) • Formal and informal presentation skills including platform techniques and visual aids • How to evaluate briefings/presentations • Use of feedback to check understanding • Reporting back to management after briefing • The value of various methods of data presentation – tables, graphs, charts, diagrams, Gantt charts, etc • Evaluation of alternative methods to select the most appropriate for a given situation • How to construct a range of data presentation methods • The use of spreadsheets for the creation of graphs, charts and diagrams • How to interpret information contained in charts and diagrams, and explain this to others • Supervised practice or simulation to develop the ability to apply knowledge and skills

Title:	Planning to work efficiently (M3.20)	
Level:	3	
Credit value:	2	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Know how to plan work		1.1 Identify targets set for the team; and state indicators to measure performance 1.2 Use one appropriate planning technique to plan a job activity 1.3 Explain one technique to monitor and control a planned job activity 1.4 Explain the importance of the supply chain in delivering results and meeting customer requirements
2 Understand the importance of efficiency and effectiveness to achieve objectives		2.1 Explain the importance of effectiveness and efficiency to achieve their workplace objectives 2.2 Explain how efficiency and effectiveness are measured in their organisation
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of planning to work efficiently as required by a practising or potential first line manager.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: D6
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Restricted to ILM and City & Guilds

Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Links between organisational and team objectives • Target setting and performance indicators • Planning techniques appropriate to job activity (e.g. task/work/production schedules, timetables, rotas, Kanban systems, Just In Time and Takt time, etc, as appropriate) • Importance of supply chain in delivering results and meeting customer requirements • Monitoring and control techniques and records • Use of results to “close the loop”, so ensuring that objectives are achieved
2	<ul style="list-style-type: none"> • Definitions of effectiveness and efficiency, and the difference between them • The need to achieve results and meet objectives • The importance to the organisation of operating efficiently • Potential for conflict between efficiency and effectiveness, and ways to resolve this

Title:	Understanding the communication process in the workplace (M3.30)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Understand the communication process and relevant communication media		1.1 Outline the stages in the communication process 1.2 Identify <u>two</u> possible barriers to communication in the workplace and describe how each barrier could be overcome 1.3 Name <u>two</u> different types of communication that could ensure effective communication in the workplace and identify an advantage and a disadvantage of each 1.4 Explain how non-verbal communications can influence the receiver 1.5 Briefly explain how to use feedback to check the effectiveness of communication
2 Know how to increase information awareness in the workplace		2.1 Explain how they could increase information awareness in own workplace
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of the communication process as required by a practising or potential first line manager.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: C2
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management

Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	Restricted to ILM and City & Guilds
Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • The importance of effective communication at work and the effects of poor communication • The stages in communication: sender – encoding – transmission – decoding – receiver • Possible barriers to communication and methods to overcome them • Ways to ensure effective communication in the workplace • Different types of communication including oral, written, visual, and electronic and their relative advantages and disadvantages • Techniques of face-to-face and indirect communication, and when each is appropriate • How to use feedback to check effectiveness of communication
2	<ul style="list-style-type: none"> • The five human senses, and how to use them effectively in the workplace • Active listening skills • Focused and wide angle observation for data gathering in the workplace • Perception and its effects on the interpretation of data • Significance of non-verbal communication and body language

Title:	Influencing others at work (M3.31)	
Level:	3	
Credit value:	1	
Learning outcomes (the learner will)		Assessment criteria (the learner can)
1 Understand the value of networking		1.1 Explain the value to the first line manager of networking 1.2 Identify an appropriate network for a first line manager and describe methods to establish and maintain effective professional relationships with the identified network
2 Know how to influence and negotiate with others to achieve objectives		2.1 Explain the general principles of negotiation 2.2 Explain a relevant technique for influencing others to achieve workplace objectives 2.3 Describe how to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations
Additional information about the unit		
Unit purpose and aim(s)		To develop knowledge and understanding of influencing others as required by a practising or potential first line manager.
Unit review date		31/12/2014
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)		Links to Management & Leadership 2008 NOS: D1
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from a sector skills council or other appropriate body (if required)		Council for Administration (CfA)
Location of the unit within the subject/sector classification system		Business Management
Name of the organisation submitting the unit		Institute of Leadership & Management
Availability for use		Shared

Units available from	01/01/2008
Unit guided learning hours	6
Additional Guidance about the Unit	
Indicative Content:	
1	<ul style="list-style-type: none"> • Nature, purpose and value of networking • Identification of relevant networks • Effective networking practices and skills • Network and contact creation • Methods to establish and maintain effective professional relationships at various levels
2	<ul style="list-style-type: none"> • Formal and informal negotiation • Negotiation strategy, tactics and behaviour • Non-verbal communication and social skills • Techniques for influencing others • Value systems and other barriers to acceptance • Conflict and its resolution to achieve a win-win situation • Levels of power and authority, and the impact on negotiation

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A P P E N D I X - B

ASSESSMENTS FOR THE LEVEL 2 CERTIFICATE IN SALES MANAGEMENT

ROLE-PLAY: M2.30

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:
TASK The tutor will divide the group into pairs to carry out a role-play. Each learner will then prepare for a sales visit to a customer outlining why the customer would be interested in their solution by identifying why previous sales were successful and by identifying and prioritising customer responses. This could be either a business to business or business to consumer environment. This outline must be handed to the tutor on completion of the role-play. <i>Note: Tutors please note that the role-play should either be recorded orally or visually to give feedback to the learners and for quality assurance purposes.</i>	
<i>Please use the headings shown below when writing up your Assignment</i>	Assessment Criteria
Understand customers needs and requirements Prepare for a sales visit to a customer. In your preparation you should outline why the customer would be interested in your solution by identifying why previous sales were successful. You should use a recognised question-based structure to identify and prioritise customer responses. <i>Note: This outline should be handed to your tutor on completion of the role-play.</i> <i>(min 25 marks from 50)</i>	<ul style="list-style-type: none"> • Identified why previous sales were successful • Identified customer requirements by using a recognised structure • Recorded and prioritised customer responses
Meeting the customers needs and requirements During the role-play match the customer's requirements with your business solutions and gain commitment from the client by closing the sale. <i>Note: Briefly summarise the outcome of the sale and hand this to your tutor.</i> <i>(min 25 marks from 50)</i>	<ul style="list-style-type: none"> • Briefly described how to match a customers requirements with their organisation's relevant business solution(s) • Gained commitment from the customer by closing the sale
By submitting I confirm that this assessment is my own work	

MARK SHEET: ROLE-PLAY: M2.30

Centre Number:		Centre Name:		
Learner Registration No:		1. Learner named below confirms authenticity of submission. 2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed. However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/>		
Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand customers needs and requirements <ul style="list-style-type: none"> Identified why previous sales were successful Identified customer requirements by using a recognised structure Recorded and prioritised customer responses 			/50 marks (min 25)	
Meeting the customers needs and requirements <ul style="list-style-type: none"> Briefly described how to match a customers requirements with their organisation's relevant business solution(s) Gained commitment from the customer by closing the sale 			/50 marks (min 25)	
Assessor's decision		Quality assurance use		
Total marks	Outcome (circle as applicable)	Total marks	Outcome (circle as applicable)	
Total 50 + overall, AND minimum in each section	PASS/REFERRAL	Total 50 + overall, AND minimum in each section	PASS/REFERRAL	
Section referral if applicable:		Date of IQA check:		
Name of assessor:		Name of IQA:		
Assessor signature and date:		IQA signature:		
ILM EV signature:		Date externally verified (where applicable):		

TEAM BRIEF: M2.31

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:
TASK Prepare a brief for the team. The brief should include an outline of the sales process and the place of the sales team in achieving the organisation's objectives. <i>Note for Tutors: Microsoft Power Point with notes pages can be used as evidence for this assignment.</i>	
<i>Please use the headings shown below when writing up your Outline</i>	Assessment Criteria
Prepare a brief for a sales team about the sales process and the place of the sales team in achieving the organisation's objectives Prepare a brief for a sales team about the sales process. Your preparation should include: <ul style="list-style-type: none"> • An outline of the sales process. <i>(20% of the mark)</i> • How sales links to marketing within your workplace. <i>(25% of the mark)</i> • The difference between push and pull strategies in the marketplace. <i>(10% of the mark)</i> • How different strategies can be used to achieve sales objectives. <i>(25% of the mark)</i> • How the accumulation of sales staff targets formulate the organisation's target. <i>(20% of the mark)</i> <i>Note: You must hand you outline to your tutor for quality assurance purposes</i> <i>(min 50 marks from 100)</i>	<ul style="list-style-type: none"> • Outlined the stages in the sales process • Explained how sales links to marketing within the workplace • Described the difference between push and pull sales strategies • Described different strategies that can be used to achieve sales objectives • Identified how the accumulation of sales staffs targets formulate the organisation's target
By submitting I confirm that this assessment is my own work	

MARK SHEET: TEAM BRIEF: M2.31

Centre Number:		Centre Name:		
Learner Registration No:		1. Learner named below confirms authenticity of submission. 2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed. However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/>		
Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Prepare a brief for a sales team about the sales process and the place of the sales team in achieving the organisation's objectives <ul style="list-style-type: none"> • Outlined the stages in the sales process • Explained how sales links to marketing within the workplace • Described the difference between push and pull sales strategies • Described different strategies that can be used to achieve sales objectives • Identified how the accumulation of sales staffs targets formulate the organisation's target 			/100 marks (min 50)	
Assessor's decision		Quality assurance use		
Total marks	Outcome (circle as applicable)	Total marks	Outcome (circle as applicable)	
Total 50 + overall, AND minimum in each section	PASS/REFERRAL	Total 50 + overall, AND minimum in each section	PASS/REFERRAL	
Section referral if applicable:		Date of IQA check:		
Name of assessor:		Name of IQA:		
Assessor signature and date:		IQA signature:		
ILM EV signature:		Date externally verified (where applicable):		

KNOWLEDGE REVIEW: M2.32

Centre Number:	Centre Name:
Learner Registration No:	Learner Name:
TASK Read the questions below and answer them within the context of your work-place.	
<i>Please use the headings shown below when writing up your Assignment</i>	Assessment Criteria
The benefits and barriers to good customer care <ul style="list-style-type: none"> • Give examples of good and bad service. <i>(20% of the mark)</i> • Explain the benefits of good customer service to your organisation. <i>(20% of the mark)</i> • State five barriers to good customer care in your organisation. <i>(10% of the mark)</i> <i>(min 25 of 50 marks)</i>	<ul style="list-style-type: none"> • Gave examples of good and bad service • Explained the benefits of good customer service • Stated barriers to good customer care
Delivering a professional customer service <ul style="list-style-type: none"> • List five basic principles associated with good customer care in your organisation. <i>(10% of the mark)</i> • Explain how you deal with difficult customer behaviour(s) in your workplace. <i>(20% of the mark)</i> • Explain how you deal with complaints in your area of responsibility. <i>(20% of the mark)</i> <i>(min 25 of 50 marks)</i>	<ul style="list-style-type: none"> • Listed five basic principles associated with good customer care • Explained how to satisfactorily deal with difficult customer behaviour(s) • Explained how they deal with complaints in own area of responsibility
By submitting I confirm that this assessment is my own work	

MARK SHEET: KNOWLEDGE REVIEW – M2.32

Centre Number:		Centre Name:		
Learner Registration No:		1. Learner named below confirms authenticity of submission. 2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed. However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: <input type="checkbox"/>		
Criteria	Strengths	Areas for Improvement	Assr Mark	QA mark
The benefits and barriers to good customer care <ul style="list-style-type: none"> Gave examples of good and bad service Explained the benefits of good customer service Stated barriers to good customer care 			/50 marks (min 25)	
Delivering a professional customer service <ul style="list-style-type: none"> Listed five basic principles associated with good customer care Explained how to satisfactorily deal with difficult customer behaviour(s) Explained how they deal with complaints in own area of responsibility 			/50 marks (min 25)	
Assessor's decision		Quality assurance use		
Total marks	Outcome (circle as applicable)	Total marks	Outcome (circle as applicable)	
Total 50 + overall, AND minimum in each section	PASS/REFERRAL	Total 50 + overall, AND minimum in each section	PASS/REFERRAL	
Section referral if applicable:		Date of IQA check:		
Name of assessor:		Name of IQA:		
Assessor signature and date:		IQA signature:		
ILM EV signature:		Date externally verified (where applicable):		