



# **Qualification Specifications**

## **ISM Level 2 Certificate in Sales and Marketing**

**Valid from 01.01.25**

**Version 8**

**Ofqual regulated**

# ISM Education

ISM Education is an Awarding organisation recognised and regulated by the UK Government's regulator Ofqual (The Office of Qualifications and Examinations Regulation) to develop and award qualifications.

Our qualifications combine the practice and principles to offer universal relevance, whatever sector, organisation or country you work in. They are based on principles that set out the knowledge, skills, and behaviours expected of competent professionals. The programmes are designed to accommodate every potential professional along their career path from the earliest stages through to when they are at true exponents of their craft.

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# Section 1 General Information

## 1.1 Introduction

This Qualification Specification is to inform ISM learners and centres about the delivery and assessment of the ISM Level 2 Certificate in Sales and Marketing. The latest version of this document will always be posted on the ISM website at: [www.ismeducation.com](http://www.ismeducation.com)

It should be read in conjunction with the Centre Guide which gives detailed guidance on running the qualifications in your centre. The Centre Guide is available on request from [contact@ismeducation.com](mailto:contact@ismeducation.com)

## 1.2 REGULATED QUALIFICATIONS FRAMEWORK (RQF)

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

There are eight levels of the RQF, underpinned by three 'entry' levels. A qualification's level indicates the difficulty and complexity of the knowledge and skills associated with the qualification. The size of the qualification is determined by the estimated number of study hours both supervised and self-study a typical learner will need to achieve the qualification is expressed in terms of Total Qualification Time (TQT).

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

## 1.3 Who are the qualifications aimed at?

The ISM Level 2 Certificate in Sales and Marketing has been approved for use with the following age groups:

- Pre-16
- 16-18
- 19+

Level 2 qualifications are Vocationally Related Qualifications designed for new or aspiring sales professionals or students in secondary or further education with little or no experience of sales.

Learners are not required to have any prior learning in sales or any work experience in sales, but they may have some experience of buying or retail.

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

## **1.4 Qualification definitions**

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

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

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

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

This specification details the ISM qualifications at level 2. Other specifications are available for other levels. ISM does not offer a Diploma at level 2.

## **1.5 Unit definition**

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

## **1.6 Delivering the Qualifications**

ISM does not prescribe any method of delivery to training organisations, who are free to use any methods of delivery suitable to their learners. Methods may include open, distance, blended or online learning. In qualifications with more than one unit, units may be delivered and assessed in any order.

## **1.7 Grading**

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

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

Total Qualification Time (TQT) is a guide to how long this qualification would take an average learner to complete and is comprised of Guided Learning Hours (GLH) and Directed Study (DS).

GLH is defined as any learning that is under the immediate guidance of a tutor. It may include induction, face to face training, e-learning with the co-presence of learner and tutor, invigilated exams.

DS is defined as any non-supervised, directed, private and online study and non-invigilated assessment.

## **1.9 Credit**

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

## **1.10 Indicative content**

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

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

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

Indicative content is also useful for assessors, moderators and external quality assurers when reviewing the learner's evidence.

## 1.11 Progression

The qualification provides opportunities for progression to other qualifications such as the ISM Level 3 Certificate and Diploma and they support learners in meeting the knowledge and skills requirements for employment within sales.

## 1.12 Language

The qualification is offered in the medium of the English language.

## 1.13 Qualification overview

The qualification title is shown as it will appear on the certificate when awarded to the learner. The qualification reference number is the number allocated to the qualification by Ofqual. Each unit also has a unique Ofqual unit reference number which can be found within the content of each unit in this syllabus.

## 1.14 Rules of combination

The **ISM Level 2 Certificate in Sales and Marketing** consists of a combination of units. To achieve the Certificate, learners must complete each of the Mandatory Units U201, U202, U203 and U204 plus any **one** of the Optional Units U205, U206 or U207, totalling 17 credits.

Units U205, U206 and U207 contain overlapping assessment criteria hence only one of the three units may be taken within the Certificate. Unit U205 is suited to practising salespeople whilst Unit U206 is theoretical and can be taken by those not employed in a sales role. Unit U207 is for people in, or wishing to be in, a telesales role.

### Level 2 Certificate in Sales and Marketing

Unit code	Unit title	Unit reference number	Assessment	Credit
<b>Mandatory Units</b>				
U201	Understanding laws and ethics of selling	Y/502/7482	Assignment	3

U202	Understanding marketing	D/502/7483	Assignment	4
U203	Understanding buyer behaviour	H/502/7484	Assignment	3
U204	Sales targets	K/502/7485	Assignment	2
<b>Optional Units</b>				
U205	Selling to customers	T/502/7487	Assignment	5
U206	Understanding selling to customers	F/502/7489	Assignment	5
U207	Telesales	F/502/7492	Assignment	5

## 1.15 Assessment

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

### Centre assessment staff

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

The centre is also required to appoint an Internal Quality Assurer who is accountable for the moderation of all assessment decisions in the centre for the ISM qualification(s). The Assessor and Internal Quality Assurer roles must be carried out by different people. If your centre has difficulty finding a suitable person for the Internal Quality Assurer role, please contact the ISM at [contact@ismeducation.com](mailto:contact@ismeducation.com) or phone +44 2033559960.

### ISM assessment staff

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

### Assessment route

Learners will demonstrate that they have met the assessment criteria for each unit, by completing tasks contained within a Model Assignment created by ISM.

Learners have the option to use evidence from a variety of sources when completing the tasks. For example, desk-based research of products and markets or actual evidence from the workplace. Each Model Assignment details the evidence that will be acceptable.

### Model Assignment

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

Centres should use the ISM Model Assignment exactly as they receive it, with no amendments.

The Model Assignment will be sent to centres on request.

## 1.16 Recognition of Prior Learning and Achievement

There may be instances where learners will wish to claim recognition of prior learning which has not been formally assessed and accredited. In those instances, centres should contact ISM for further information. Details of the process for RPL (Recognition of Prior Learning) are available from the ISM.

## 1.17 Centre recognition

Centres must pass through the ISM centre recognition process to become an ISM Recognised Centre before offering any ISM qualifications. An application form is available please use this link. <https://ismeducation.com/ism-education-recognised-centres/>

## 1.18 Support and guidance for centres

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

A handbook is provided to centres to give guidance on administrative procedures. Study guides tailored to each unit are available to support learners.

For up-to-date details of the above support, contact the ISM at: [contact@ismeducation.com](mailto:contact@ismeducation.com)

## 1.19 Equality of opportunity

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

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

## Section 2

### 2.1 Units

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

Unit aim			On completion of this unit, learners will be able to apply relevant legislation and be able to explain ethical requirements in sales. They will be able to explain the benefits of operating ethically. They will be able to explain how to raise legal and ethical issues within their own organisation and will be able to show an understanding of the consequences of non-compliance for employees and organisations.		
Level	2	ISM Unit no.	U201	Unit reference no.	Y/502/7482
Credit Value	3	TQT	30	Guided Learning Hours	24
Mapping to National Occupational Standards				Sales NOS 7.8	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Understanding the laws affecting selling	1.1. Identify the laws affecting selling in an organisation  1.2 Describe how the laws affect selling in an organisation  1.3 Describe the consequences for self, organisation and customer if legal requirements are not complied with	Consumer legislation, sales of goods and services acts, effect of GDPR on record keeping. Organisational responsibility to ensure products meet legal requirements and their sales staff are trained in, and compliant with, sales and consumer protection legislation and data protection,  Consequences such as investigations by industry watchdogs, fines, imprisonment, loss of licence, reputation and

		business Main laws and their effects in your sector, GDPR)
	1.4 Describe the procedure to be followed if they suspect non-compliance within the organisation. (illegal behaviour)	Chain of command, record keeping, confidentiality issues, escalating the concern
2. Understand the ethics of selling	<p>2.1 Describe the personal qualities required of sales staff</p> <p>2.2 Describe the benefits of selling ethically</p> <p>2.3 Describe the Importance of industry codes of conduct</p> <p>2.4 Describe the consequences for self, organisation and customer if a member of the sales staff behaves unethically</p>	<p>Ethical qualities honesty, fairness, trustworthiness, professional</p> <p>Ethical benefits (enhances trust attracts investment, builds sales through customer loyalty, high staff morale)</p> <p>Codes of good practice in different sectors set out expected behaviour of professionalism – ISM code of conduct for salespeople</p> <p>Loss of trust, bad reputation, lost sales, high staff turnover</p>

## Unit U202: Understanding marketing

Unit aim	On completion of this unit learners will be able to explain market segmentation and targeting; describe how to carry out effective market research; explain and apply the marketing mix				
Level	2	ISM Unit no.	U202	RQF unit reference no.	D/502/7483
Credit Value	4	TQT	40	Guided Learning Hours	40
Mapping to National Occupational Standards	Sales NOS 3.4 and 9.1				

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Understand how marketing is planned in an organisation	1.1 Describe what marketing is  1.2 Describe the structure of a marketing plan used in organisations	Marketing definitions across various sectors and organisations  Produce a basic marketing plan for a given product to include market research, target market, positioning, competitive analysis, SWOT, strategy, budget, metrics, marketing mix,
2. Understand how customers can be segmented	2.1 Describe consumer and business segmentation related to a range of products  2.2 Describe how to target a segment for marketing purposes	Segmentation bases: consumer bases- demographic, geographic, psychographic Business: industry, size, location  Specific groups with well-defined and similar characteristics that share a need or desire for a given product. Specific groups with well-defined and similar characteristics that are appropriate/have a need for the product/service
3. Understand how to carry out market research	3.1 Describe market research methods	Research methods: primary – new information direct from source, questionnaires, surveys, phone polls, visits to competitors, use of competitors products

	3.2 Describe how to carry out market research	<p>secondary – desk based, previously gathered information, statistics, journals, internet; past records of the organisation</p> <p>Detail information requirements, choose target audience, research method, collect data, analyse results, recommendations based on research</p>
4. Understand the marketing mix	<p>4.1 Identify the features and benefits of products and services</p> <p>4.2 Describe approaches to pricing products and services</p> <p>4.3 Identify channels or routes to market from production to consumption</p> <p>4.4 Describe the elements of the promotion mix</p> <p>4.5 Describe the use of physical evidence</p> <p>4.6 Describe how people add value to the customer experience</p>	<p>7 P's; product, price, place, promotion, physical evidence, people, processes</p> <p>Price skimming, premium pricing, value pricing, cost-plus, competitive, dynamic</p> <p>Place to include a range of distribution channels, including direct sales, wholesalers, retailers, distributors, agents, franchisees, internet.</p> <p>Promotion to include advertising, digital marketing, public relations, sponsorship, sales promotion, personal selling, direct mail</p> <p>Physical evidence to include packaging, paperwork, signage, business cards, web pages, brochures, uniforms, buildings</p> <p>Professionalism: competence and skills of staff including customer service, advice, assurance, sales support</p>
	4.7 State how organisation processes create the overall customer experience	Processes including designing process to suit the customer not the organisation, the customer experience and their feedback, retaining customers, personalisation of the process, control processes for objective achievement

## Unit U203: Understanding buyer behaviour

Unit aim				On completion of this unit learners will be able to explain the buyer decision-making process, to include a range of influences on both consumer and business to business (B2B) buyers	
Level	2	ISM Unit no.	U203	RQF unit reference no.	H/502/7484
Credit Value	3	TQT	30	Guided Learning Hours	24
Mapping to National Occupational Standards				Sales NOS 9.1	

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative Content
1. Understand consumer and organisational decision-making units	1.1 Describe the consumer decision-making unit  1.2 Describe the organisational decision-making unit	Consumer decision-making unit consists of individual, couple, family unit, or group buying for personal use. (information gatherer, influencer, decision maker, purchaser, consumer)  Organisational decision-making unit is more complex as it involves individuals with different roles and requirements, needing details relevant to their roles (gatekeepers, initiators, influencers, deciders, buyers, users, finance)
2. Understand how to interpret buyer needs and wants	2.1 Explain the differences between buyer needs and wants	Needs and wants (definition, explanation, differences, Maslow's hierarchy of needs)

	2.2 Explain how to find out buyer needs and wants	Identifying needs and wants through questioning and listening skills, product knowledge – features, benefits, USPs)
3. Understand consumer and business-to-business decision-making processes	3.1 Describe the consumer buyer decision-making process  3.2 Describe the business-to-business buyer decision-making process	Consumer decision-making process (DMP); problem or need identification, information search, information evaluation, decision, post purchase evaluation B2B DMP (need recognition, , item specification, supplier search, proposal analysis, proposal evaluation and supplier selection, order routine, performance feedback and evaluation)
4. Understand the influences motivating the buyer	4.1 Explain the influences motivating the consumer buyer  4.2 Explain the influences motivating the organisational buyer  4.3 Differentiate between the motivation of business to consumer buyers and business to business buyers	Consumer motivation (influences –cultural, lifestyle, economic situation, third party influences, brand loyalty, marketing campaigns, endorsements)  Organisational motivation (trusted suppliers, reputation, testimonials, price and value, payment terms, delivery)  Consumers – individual rational and emotional needs, B2B individual and company accountability is major factor, as well as rational and emotional needs i

## Unit U204: Sales targets

Unit aim				On completion of this unit learners will be able to demonstrate an understanding of sales targets and their uses, including agreeing sales targets with supervisors, the responsibility of meeting sales targets, monitoring performance against the agreed target and taking necessary action in response to identified variances and unforeseen developments.	
Level	2	ISM Unit no.	U204	RQF unit reference no.	K/502/7485
Credit Value	2	TQT	20	Guided Learning Hours	16
Mapping to National Occupational Standards				Sales NOS 3	

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Understand sales targets	1.1. Explain the purpose of sales targets in an organisation  1.2 Explain how sales targets are set	To ensure sufficient revenue is generated for the organisation to cover costs and generate sufficient profit to cover the needs of shareholders, investment and growth. Budget is set and sales targets agreed to ensure desired sales are achieved. Motivators for sales staff  Distribution of the organization revenue budget requires knowledge of the business- use of historical sales figures, expected growth, sales force distribution and size, territory size, product range, economic climate, seasonal effects

	1.3 Explain the need for monitoring sales targets	Regular monitoring of actual sales revenue generated against target will enable the organization to predict if the required revenue will be generated for the year. Where shortages are identified the organization will be able to, take action to improve performance, adjust spending, delay projects. Monitoring of individual staff
	1.4 Describe factors that can cause variances to sales targets	Economic recession, poorly skilled salespeople, new competitors, competitors leaving the market product issues, lack of targeted marketing activity
	1.5 Identify actions to bring sales back on target when there is a negative variance	Short- and long-term actions. Product promotions, financial incentives for sales staff, sales skills training, marketing support, revise pricing structure, revise product offer, payment terms, delivery schedules, market research to determine growth areas
	1.6 Describe consequences to self and organisation of not meeting own sales targets	Loss of commission and earnings, reduction in motivation, job losses across the organisation, drop in share prices, expenditure cuts

## Unit U205: Selling to customers

Unit aim				On completion of this unit learners will be able to demonstrate the skills of selling to customers face to face.  Some contact with customers may be via telephone, e-mail or in writing but successful performance in this unit involves direct contact with customers	
Level:	2	ISM Unit no.	U205	RQF unit reference no.	T/502/7487
Credit Value	5	TQT	50	Guided Learning Hours	40
Mapping to National Occupational Standards				Sales NOS 7.2	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Be able to prepare for the sale	1.1 Plan time for the sales meeting  1.2 Select resources to be used during the sales meeting  1.3 Plan responses to recognised sales objections	Research your prospect, prepare open, closed and probing questions to qualify the prospect. Determine purpose of meeting and desired outcomes. Identify amount of time required per customer. Diarise date, venue and time. Plan route.  Promotion materials, other documents, laptop to show product . product demonstrations, testimonials, samples, ordering system, contract, tender.  Sales objections that frequently occur, price, need time to think about it, need to speak with someone else, budget, existing supplier, unclear value or benefits

	<p>1.4 State own limits of authorisation in negotiation</p> <p>1.5 Comply with own organisation's standards of appearance for the sales meeting</p>	<p>Know limits of own authority on price and any incentives/discounts and work within them</p> <p>Proper grooming, personal hygiene and professional appearance</p>
2. Be able to establish a rapport with the customer	<p>2.1 Use a range of communication skills to meet and greet the customer</p> <p>2.2 Use a range of open questions to build rapport and to put the customer at ease</p>	<p>Creating a positive impression, friendliness, breaking the ice, handshake, smile, business card, personal space</p> <p>Smalltalk, open-ended questions, start building the relationship, body language, confidence, effective listening</p>
3. Be able to identify customer requirements	<p>3.1 Identify customer requirements through the use of questioning and active listening</p> <p>3.2 Confirm customer requirements by summarising their buying needs and interests</p> <p>3.3 Ask further questions to identify any additional needs</p>	<p>Need/problem identification through open and probing questions, active listening, body language, paraphrasing client's words</p> <p>Summarise identified needs, grade in order of importance to the customer</p> <p>Ask further questions to identify additional needs, take opportunity to up-sell / cross-sell.</p>
4. Be able to present own products and/or services to the customer	<p>4.1 Outline the features and benefits of own products and/or service that meet the customer's needs</p> <p>4.2 Communicate unique selling points to the customer</p> <p>4.3 Provide the customer with the opportunity to fully discuss and assess features and benefits of products and/or services</p>	<p>Focus on features and benefits that are relevant to meeting that customer needs</p> <p>Definition of USPs. Create value in your product through focusing on USPs relevant to that customer</p> <p>Make it easy for the customer to raise any concerns so you can provide assurance and move the sale forward</p>

<p>5. Be able to deal with sales objections from the customer</p>	<p>5.1 Use questioning techniques to explore customer objections</p> <p>5.2 Use knowledge of products and/or services in order to resolve customer objections</p> <p>5.3 Identify potential trade-offs that will be mutually beneficial to the customer and to own organisation</p> <p>5.4 Confirm with the customer that their objections have been overcome</p>	<p>Listen, acknowledge concern, check understanding by repeating back to customer, isolate (is this the only concern that is preventing the sale) explore reason for objection, answer objection, propose solution, agree solution</p> <p>In-depth knowledge of products/services and use knowledge to answer objections.</p> <p>How to trade off, exchanging one benefit for another. Negotiation skills within limits of authority. Know when to say "No".</p> <p>Demonstrate understanding and empathy with customer's situation. Confirm objection dealt with to customer's satisfaction</p>
<p>6. Be able to progress the sale</p>	<p>6.1 Identify verbal and non-verbal buying signals as indications of whether or not to move towards closing the sale</p> <p>6.2 Confirm with the customer that the product and/or services identified meets their needs</p> <p>6.3 Comply with company procedures for up-selling, cross-selling and selling of add-ons</p>	<p>Listen, watch and pay close attention to what your customer is saying and doing</p> <p>Summarise needs, show how solution meets needs</p> <p>Know company procedures.</p>
<p>7. Be able to close the sale</p>	<p>7.1 Perform a trial close to establish whether or not further objections exist</p> <p>7.2 Close the sale by gaining the commitment of the customer</p>	<p>Trial closing techniques to test readiness of customer to buy; gauge customer's interest</p> <p>Ask for the order.</p>

## Unit U206: Understanding selling to customers

Unit aim		<p>On completion of this unit learners will be able to describe, explain and understand the skills of selling to customers face to face.</p> <p>The unit aims to encourage sales performance in a number of areas but in particular after initial contact has been made with customers. The unit includes identifying your customer's buying needs, promoting benefits and features of your organisation's products and services, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.</p> <p>The unit also requires you to know how to respond to verbal and non-verbal buying signals, both negative and positive, as well as good levels of knowledge and understanding of your organisation's products and services.</p>			
Level:	2	ISM Unit no.	U206	RQF unit reference no.	F/502/7489
Credit Value	5	TQT	50	Guided Learning Hours	40
Mapping to National Occupational Standards			Sales NOS 7.2		

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Understand how to prepare for the sale	1.1. Describe how to plan time for the sales meeting  1.2 Describe resources to be used during the sales meeting  1.3 Identify responses to recognised sales objections	<p>Research your prospect, prepare open, closed and probing questions to qualify the prospect. Determine purpose of meeting and desired outcomes. Suggest the amount of time required per customer. Factors when agreeing the date, venue and time.</p> <p>Promotion materials, other documents, laptop to show product, product demonstrations, testimonials, samples, ordering system, contract, tender.</p> <p>Sales objections that frequently occur, price, need time to think about it, need to speak with someone else, budget, existing supplier, unclear benefits</p>

	<p>1.4 Explain why sales staff have limits of authorisation in negotiation</p> <p>2.4 Explain why organisations In</p> <p>3.4 Explain why organisations have standards of appearance for the sales staff.</p>	<p>questioning techniques to probe needs and wants in relation to objections</p> <p>Describe typical limits of authority and how they are set.</p> <p>Typical parameters for an organisation's standards of appearance and personal hygiene,</p>
2. Understand how to establish a rapport with the customer	<p>2.1 Describe a range of communication skills to meet and greet the customer</p> <p>2.2 Describe a range of open questions to build rapport and to put the customer at ease</p>	<p>Creating a positive impression, breaking the ice, handshake, smile, business card, personal space</p> <p>Smalltalk, open-ended questions, body language, confidence, relaxation, active listening</p>
3. Understand how to identify customer requirements	<p>3.1 Describe how to identify customer requirements through the use of questioning and active listening</p> <p>3.2 Describe how to confirm customer requirements by summarising their buying needs and interests</p> <p>3.3 Describe further questions to identify any additional needs</p>	<p>Need/problem identification through open and probing questions, active listening, body language paraphrasing customer's words</p> <p>Summarise needs and interests, match products to customer's needs and gain commitment to suitability</p> <p>Ask further questions to identify additional needs, take opportunity to up-sell / cross-sell.</p>
4. Understand how to present own products and/or services to the customer	<p>4.1 Identify the features and benefits of own products that meet the customer's needs</p> <p>4.2 Describe unique selling points</p> <p>4.3 Describe the importance of discussing and assessing features and benefits of products and/or services</p>	<p>Focus on the features and advantages of your product that you have identified as being important to the customer. Keep focussed</p> <p>Pick unique selling points relevant to your customer highlight value to customer</p> <p>Techniques for allowing customer to lead the discussion and raise points. The importance of silence at the right times.</p>

<p>5. Understand how to deal with sales objections from the customer</p>	<p>5.1 Describe questioning techniques to explore customer objections</p> <p>5.2 Describe the importance of knowledge of products and/or service in order to resolve customer objections</p> <p>5.3 Identify potential trade-offs that would be mutually beneficial to the customer and to own organisation</p> <p>5.4 Describe the importance of confirming with the customer that their objections have been overcome</p>	<p>Listen for potential standard and non-standard objections, treat as opportunity to learn more about customer's needs. Open, closed, probing, hypothetical questions. Narrow down issues and prioritise concerns</p> <p>In-depth knowledge of products and how to use knowledge when answering objections. Valid and invalid objections.</p> <p>How to trade off, exchanging one benefit for another. Negotiation skills within limits of authority. Know when to say "No".</p> <p>Demonstrate understanding and empathy with customer's situation. Confirm objection dealt with to customer's satisfaction</p>
<p>6. Understand how to progress the sale</p>	<p>6.1 Describe verbal and non-verbal buying signals which indicate whether or not to move towards closing the sale.</p> <p>6.2 Describe how to confirm with the customer that the product identified meets their needs</p> <p>6.3 Describe company procedures for up-selling, cross-selling and selling of add-ons</p>	<p>How and when to move towards closing. Verbal and non-verbal signals.</p> <p>Ask customer if needs met. Summarise needs, show how solution meets needs</p> <p>Know company procedures. Look for opportunities for up-selling, cross-selling, add-ons</p>
<p>7. Understand how to close the sale</p>	<p>7.1 Describe how to perform a trial close to establish whether or not further objections exist</p> <p>7.2 Describe how to close the sale by gaining the commitment of the customer</p>	<p>Trial closing techniques to test readiness of customer to buy; gauge customer's interest</p> <p>Ask for the order.</p>

## Unit U207: Telesales

Unit aim		<p>On completion of this unit learners will be able to identify, explain and develop the procedures used for closing sales over the phone.</p> <p>This will include identifying a customer's buying requirements, promoting benefits and features of your organisation's products, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.</p> <p>You will also be able to pick up and respond to verbal and non-verbal buying signals, both negative and positive, as well as demonstrating good levels of knowledge and understanding of your organisation's products I .</p>			
Level:	2	ISM Unit no.	U207	RQF unit reference no.	F/502/7492
Credit Value	5	TQT	50	Guided Learning Hours	40
Mapping to National Occupational Standards			Sales NOS 7.3		

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Be able to prepare for the sales call	1.1. Organise resources needed for the sales call  1.2 Plan responses to recognised sales objections  1.3 State own limits of authorisation in negotiation	<p>Call lists or leads, product information, ordering system, telephone system, information recording system</p> <p>Organisation procedure for responses to in-bound and/or outbound calls. Range of behaviours displayed by customers and how to manage them constructively. Consider customer's needs, wants and expectations; competitor comparisons; USPs; consider standard and unusual objections; questioning techniques to probe needs and wants in relation to objections</p> <p>Know limits of own authority and work within them Know when to refer upwards</p>

<p>2. Be able to establish a rapport with the customer</p>	<p>2.1 Greet and establish a rapport with the customer in accordance with the organisation's procedure</p>	<p>Create a positive impression, ask if time is convenient for customer, introduce self and organisation Ability to sound fresh and unscripted at each call</p>
<p>3. Be able to identify customer requirements</p>	<p>3.1 Identify customer requirements through the use of questioning and active listening</p> <p>3.2 Confirm customer requirements by summarising their buying needs and interests</p> <p>3.3 Ask further questions to identify any additional requirements</p>	<p>Need/problem identification through open and probing questions, active listening.</p> <p>Summarise needs and interests, match products to customer's needs and confirm suitability</p> <p>Ask further questions to identify additional needs, take opportunity to up-sell / cross-sell.</p>
<p>4. Be able to present products to the customer</p>	<p>4.1 Outline the features and benefits of own products that meet the customer's requirements</p> <p>4.2 Communicate unique selling points to the customer</p> <p>4.3 Provide the customer with the opportunity to fully discuss and assess features and benefits of products</p>	<p>Difference between features and benefits. Focus on the benefits to the customer i.e the hole not the drill</p> <p>Communication skills, open and probing questions, active listening. Definition of USPs.</p> <p>Knowledge of products and organisation's own UDSPS How to interpret buying signals</p>
<p>5. Be able to deal with sales objections over the phone</p>	<p>5.1 Use questioning techniques to explore customer objections</p> <p>5.2 Use knowledge of products/services in order to resolve customer objections</p>	<p>Listen for potential standard and non-standard objections, treat as opportunity to learn more about customer's needs. Open, closed, probing, hypothetical questions. Narrow down issues and prioritise concerns</p> <p>In-depth knowledge of products and how to use knowledge when answering objections. Valid and invalid objections.</p>

	<p>5.3 Identify potential trade-offs that will be mutually beneficial to the customer and to own organisation</p> <p>5.4 Confirm with the customer that their objections have been overcome</p>	<p>How to trade off, exchanging one benefit for another. Negotiation skills within limits of authority. Know when to say “No”.</p> <p>Demonstrate understanding and empathy with customer’s situation. Confirm objection dealt with to customer’s satisfaction</p>
6. Be able to progress the sale	<p>6.1 Identify verbal and non-verbal buying signals as indications of whether or not to move towards closing the sale</p> <p>6.2 Confirm with the customer that the product identified meets their needs</p> <p>6.3 Comply with company procedures for up-selling, cross-selling and selling of add-ons</p>	<p>How and when to move towards closing. Verbal and non-verbal signals.</p> <p>Ask customer if needs met. Summarise needs, show how solution meets needs</p> <p>Know company procedures. Look for opportunities for up-selling, cross-selling, add-ons</p>
7. Be able to close the sale	<p>7.1 Perform a trial close to establish whether or not further objections exist</p> <p>7.2 Close the sale by gaining the commitment of the customer</p>	<p>Trial closing techniques to test readiness of customer to buy; gauge customer’s interest</p> <p>Ask for the order.</p>