

# Qualification Handbook

## BIIAB Level 2 Certificate in Principles of Sales

601/6778/6

C00/0743/8

Version 3

<b>Version and date</b>	<b>Change, alteration or addition</b>	<b>Section</b>
Version 2, May 2016	Assessment Methodology	Rules of Combination and Structure
January 2018, Version 3	Updated handbook throughout to remove reference to “QCF”	Front page, header, Section 1, 5, 8, 13
	Updated RoC with TQT figures	Section 6

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## 1. About the BIIAB Level 2 Certificate in Principles of Sales

BIIAB is regulated to deliver this qualification by Ofqual in England, Wales and Northern Ireland. The qualification has a unique Qualification Number (QN) which is shown below. Each unit within the qualification will also have a regulatory Unit Reference Number (URN).

The QN code will be displayed on the final certificate for the qualification.

Qualification Title	Qualification Number (QN)	Qualification Wales Approval/Designation Number
BIIAB Level 2 Certificate in Principles of Sales	601/6778/6	C00/0743/8

## 2. Objective and Purpose of this Qualification

This qualification will help learners to develop the knowledge needed in Sales. It is relevant for those who are currently employed, or are looking to become more employable, for example as a Trainee Sales Advisor, Telesales Operator or Junior Sales Executive. This qualification focusses on the knowledge required in Sales roles and forms the knowledge component of the Intermediate Apprenticeship in Sales and Telesales in England, Wales and Northern Ireland. Apprentices will also need to complete the BIIAB Level 2 NVQ Certificate in Sales and Functional Skills in English and Maths (or Essential Skills in Wales and Northern Ireland).

The primary purpose of the qualification is to prepare for further learning or training by developing knowledge and/or skills in a subject area. However, employers can also rely on the knowledge provided as meeting nationally recognised standards for Sales at this level.

Due to constant Regulatory, policy and funding changes users are advised to check this qualification is funded for use with individual learners before making registrations. If you are unsure about the qualification's status please contact BIIAB head office.

### 3. About this Handbook

This handbook has been developed to provide guidance for learners, assessors and verifiers undertaking, delivering, or quality assuring this qualification.

The purpose of the handbook is to provide the majority of the key information that may be needed to prepare for, and help support, the successful delivery of the qualification, in one place.

If this document is updated, centres will be notified via the BIIAB monthly newsletter which goes to approved centres.

### 4. BIIAB Customer Service

BIIAB is committed to giving the highest possible levels of customer service. The BIIAB's Service Level Agreement is available via [www.biiab.org](http://www.biiab.org).

Our Customer Service team can be contacted between the hours of 0900 and 1700 Monday to Friday by using the contact details below, or outside those hours, by leaving a message on our voicemail service.

Customer Service Contact Details: 01276 684449

Email: [customersupport@bii.org](mailto:customersupport@bii.org)

Our Customer Service team will be happy to assist with any administration-related enquiries you may have. For example:

- registration and certification enquiries
- re-certification issues
- Centres available in the local area
- appeals
- whistleblowing.

## 5. What are Rules of Combination (ROC)?

Under the Regulatory Framework qualifications can be made up of a combination of mandatory and/or optional units. The units and credits required to complete a qualification are set out by the rules of combination (RoC). The RoC allows for flexibility and transferability.

The ROC will specify:

- The total credit value of the qualification
- The amount of credit that must be achieved within specific groupings of units (e.g. Mandatory, Optional Unit, and Optional groups)
- The minimum credit which must be achieved at the level or above the level of the qualification
- The Total Qualification Time (TQT)
- The title, Unit Regulation Number and BIIAB Unit number for each unit, alongside its level, credit, and Guided Learning Hours (GLH)
- Any barred units (units that cannot be taken together as part of the qualification).

When choosing the appropriate route for a learner or group of learners, it is the responsibility of the centre to ensure the rules of combination are adhered to.

## 6. BIIAB Level 2 Certificate in Principles of Sales Rules of Combination (ROC) and Structure

To achieve the BIIAB Level 2 Certificate in Principles of Sales learners **must** gain a **total of 18** credits. This **must** consist of:

- **Minimum total credit: 18**
- Mandatory Group A **minimum** credit: **14**
- Optional Unit Group B **minimum** credit: **4**
- A **minimum of 18** credits **must** be achieved through the completion of units at **Level 2** and above
- GLH: **131**
- TQT: **180**

The qualification has been developed based upon industry feedback as to the fundamental knowledge required to work in the sector at the level.

Listed below are the qualification units.

### Mandatory Group A

Unit No.	URN	Unit Title	Credit	Level	GLH	Assessment Method
MS4	T/502/8204	Understanding the sales environment	3	2	20	Assessment Knowledge Module (AKM)
MS13	A/502/8205	Understanding sales techniques and processes	5	2	40	Assessment Knowledge Module (AKM)
MS1	F/502/8206	Understanding legal, regulatory and ethical requirements in sales or marketing	2	2	15	Assessment Knowledge Module (AKM)
CCO3	L/601/7638	Principles of personal responsibilities and working in a business environment	4	2	32	Assessment Knowledge Module (AKM)

**Optional Group B**

Unit No.	URN	Unit Title	Credit	Level	GLH	Assessment Method
MS5	L/502/8208	Understanding sales targets	2	2	13	Assessment Knowledge Module (AKM)
MS6	R/502/8209	Understanding business awareness in sales	2	2	11	Assessment Knowledge Module (AKM)
MS7	L/502/8211	Principles of presentations and demonstrations in sales	2	2	15	Assessment Knowledge Module (AKM)
MS8	A/502/8219	Principles of selling at trade fairs and exhibitions	2	2	18	Assessment Knowledge Module (AKM)
MS9	J/502/8224	Customer service in sales	3	2	25	Assessment Knowledge Module (AKM)
MS2	F/502/8223	Understanding the relationship between sales and marketing	3	3	21	Assessment Knowledge Module (AKM)
MS10	Y/502/8227	Principles of online selling	3	3	24	Assessment Knowledge Module (AKM)
MS11	H/502/8232	Understanding customers' creditworthiness for sales	2	3	16	Assessment Knowledge Module (AKM)
MS12	M/502/8234	Competitor analysis in the sales environment	2	3	20	Assessment Knowledge Module (AKM)

**Barred units**

This unit	Is barred against this unit
MS7 Principles of presentations and demonstrations in sales (L/502/8211)	MS8 Principles of selling at trade fairs and exhibitions (A/502/8219)



## 7. Age Restriction

The qualification in this handbook is appropriate for use in the following age ranges:

- Pre-16
- 16-18
- 19+.

## 8. Entry Requirements and Progression

There are no entry requirements for this qualification. However, learners must be assessed to ensure they have a reasonable chance of achievement and will be able to generate the required evidence.

This qualification is designed to equip learners with the knowledge to work effectively within Sales at this level. The recommended progression route is to the BIIAB Level 2 NVQ Certificate in Sales, or, if the learner is ready to progress to a higher level, the BIIAB Level 3 Certificate in Principles of Sales may be appropriate.

Achievement of the qualification offers opportunities for progression, including:

- 601/6782/8 BIIAB Level 2 NVQ Certificate in Sales
- 601/6783/X BIIAB Level 3 Certificate in Principles of Sales
- 601/6785/3 BIIAB Level 3 NVQ Diploma in Sales

## 9. Assessment

### Overview of assessment strategy

The qualification contains knowledge units. These units are assessed by Assessment Knowledge Modules (AKMs) externally set by the BIIAB. The AKMs are internally marked assessments, containing a series of questions, marked and internally verified by the centre and with external verification by the BIIAB External Quality Assurer (EQA). Assessments provided by BIIAB will ensure that effective learning has taken place and that learners have the opportunity to:

- Meet the assessment criteria
- Achieve the learning outcomes.

### Assessment process

Assessment is the process used to judge the competence, of a learner, against set standards. The assessor is the person who is responsible for determining learners' competence. The assessor may be a work place supervisor or an external person who is trained and qualified, or working towards a qualification relevant to the assessor role.

Assessors base their judgement on performance and decide how it compares to the national standard. The assessor will also ask questions based on the knowledge required to do the work, to ascertain the knowledge and understanding of the learner.

When the required units have been completed and the assessor is satisfied that the learner has met the national standard, a recommendation for a certificate will be made.

An Internal Quality Assurer (IQA) is responsible for the quality assurance of the qualifications within the training organisation and will provide advice, guidance and support to the assessors. IQAs also ensure that the assessors apply the standards consistently and fairly. The IQA will see review the portfolio of evidence during the assessment process.

An External Quality Assurer (EQA), who is appointed by BIIAB, will verify the assessment and internal verification decisions involved in the development of the portfolio. The EQA will quality assure the qualification process, which ensures that certification of the qualification is reliable, consistent and to the national standard, by checking the consistency of assessments made by the training provider, and across training providers.

### Assessment Strategy

The Assessment Strategy has been designed by Skills CFA. While BIIAB has not itself designed the strategy it agrees with the principles and their suitability as an Assessment Strategy for this qualification, it has agreed that this strategy will be applied for this qualification and it has agreed that it will monitor the compliance of BIIAB centres offering this qualification against the criteria. As such all centres and their assessment must adhere to the current Skills CFA designed assessment strategy for this qualification.

The assessment strategy for this qualification can be seen in the section which follows and it provides details of the key requirements for the qualification and the assessor, verifiers delivering, quality assuring and certifying the qualification. Centres should also refer to the full strategy available at [www.skillsca.org](http://www.skillsca.org).

### Requirements of assessors, external and internal verifiers

Candidates may be assessed, moderated or verified at work either by one or several appointed individuals.

**Assessors** - The primary responsibility of an assessor is to assess candidates' performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria. It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates. To be able to assess candidates, assessors **must**:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications **must** be able to demonstrate that they are assessing to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. Any assessors working towards an appropriate qualification **must** ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period.
- be 'occupationally competent'. Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed, or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed.

- have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process. It is the responsibility of approved centres to select and appoint assessors.

**Internal Quality Assurer (IQA)** - A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQA's.

IQAs **must**:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications **must** be able to demonstrate that they are verifying to the current standards

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, his/her decisions **must** be countersigned by a suitably qualified IQA and should be supported by a qualified IQA throughout the training period.
- be 'occupationally competent'. IQAs **must** demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in the workplace.
- demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process.

**External Quality Assurer (EQA)** - The primary responsibility of EQAs is to assure quality of internal verification and assessments across the centres for which they are responsible. EQAs **must** have a thorough understanding of quality assurance and assessment practices, as well as in-depth technical knowledge related to the qualifications that they are externally verifying.

EQAs **must**:

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs holding older qualifications **must** be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions **must** be countersigned by a suitably qualified EQA and should be supported by a qualified EQA throughout their training period.
- be 'occupationally competent'. EQAs must demonstrate sufficient and current understanding of the qualifications to be verified, and know how they are applied in business.
- demonstrate competent practice in external verification of assessment, and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process. It is the responsibility of the awarding organisation to select and appoint EQAs.

Skills CFA and awarding organisations require all assessors, moderators and verifiers to maintain current competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information **must** be formally recorded in individual CPD records that are maintained in assessment centres.

### Assessment of the Knowledge Units

When assessing the knowledge and understanding based unit, it is important that the chosen assessment methodology is appropriate to this and is accurately recorded.

Assessment methodologies that are appropriate for the knowledge and understanding units include:

- Professional discussion
- Learner reflective accounts
- Question and Answer
- Assignments and Projects.

These **must** be planned, assessed and verified by centres, using approved and robust systems and procedures.

Assessors and IQAs **must** ensure that they are able to demonstrate their own CPD and competence across the units being delivered and assessed, because of the nature of the theoretical content that has to be covered.

Particular attention must be paid to units which permit learners to use their places of study or research of organisations in order to achieve the unit, and those which can only be achieved if the learner is in current employment, or there is recognition of prior learning from extensive experience in that particular occupational sector.

### Appeals

If learners are dissatisfied with an assessment outcome, they have the right to appeal. The main reasons for an appeal are likely to be:

- Learners do **not** understand why they are **not** yet regarded as competent, because of unsatisfactory feedback from the assessor
- Learners believe they are competent and that the assessor has misjudged them, or has failed to utilise some vital evidence.

BIIAB expects most appeals from candidates to be resolved within the centre. BIIAB will only consider a candidate's appeal after the centre's internal appeals procedure has been fully exhausted.

For full details of the BIIAB's appeals procedure please refer to [www.biiab.org](http://www.biiab.org)

## 10. Initial Assessment and Induction

Prior to the start of any programme it is recommended that centres should make an initial assessment of each learner. This is to ensure that the learners are entered for an appropriate type and level of qualification.

The initial assessment should identify the specific training needs that the learner has, and the support and guidance that they may require when working towards their qualification.

The centre must also identify any units the learner has already completed, or credits they have accumulated, relevant to the qualification.

BIIAB suggests that centres provide an induction programme to ensure the learner fully understands the requirements of the qualification they will work towards, their responsibilities as a learner, and the responsibilities of the centre.

## 11. Resources

BIIAB provides the following additional resources for this qualification:

- Assessment Knowledge Modules (AKMs) for assessing specific units
- Assessor Guidance for assessing specific units
- a Summative Reflective account
- Access to the units.

All of these resources are available for download via The Hub on [centrezone.bii.org](https://centrezone.bii.org).

The Hub is a secure area within CentreZone which centres approved for the qualification can access. The Hub contains documents relevant to the qualification. Centres will find The Hub on the list of tabs in CentreZone.

### Access to the Units

Units form the qualification and the standard that **must** be achieved in order to be awarded each unit. This is covered within the learning outcomes, assessment criteria and the indicative content that form part of the delivery. The majority of these units are written by the Sector Skills Council, although some are written by other organisations. BIIAB includes the mandatory units within this pack, and makes all units available via [centrezone.bii.org](https://centrezone.bii.org)

### Learner Summative Reflection

In order to claim the unit(s) for the qualification, the learner will need to complete a learner summative reflection, to reflect on their qualification, what they have learnt and how they have been able to apply this within their work role.



## 12. Design and Delivery

Centres must refer to the units that form the qualification and the standard that must be achieved in order to be awarded each unit. This is covered within the learning outcomes and assessment criteria that form part of the delivery.

Each unit within this qualification has been allocated a number of Guided Learning Hours (GLH).

This can include activities such as training/class room based sessions, tutorials, supervised study or supervised 'on-the-job' learning and face-to-face or other pre-arranged 1:1 teaching sessions (e.g. simultaneous electronic communication such as webcam contact or internet messaging). It could also include time spent undertaking assessments.

The qualification will be assigned Total Qualification Time (TQT), which, as well as GLH, will include the estimated number of hours spend in preparation, study or any other supervised learning, study or assessment for an average learner.

When planning how to deliver the qualification it is important to refer to this definition.

Centres must refer to the Assessment Principles and Additional Requirements detailed in this handbook when planning the delivery and assessment of these qualifications.

## 13. Format of Units

All units within this qualification will be presented in a standard format that is consistent with the format for all units of assessment. The format will give tutors and learners guidance as to the requirements of the unit for successful completion. Each unit within this specification will be in the format below:

### **Unit Title**

This will be shown as it appears on the Register of Regulated Qualifications (<http://register.ofqual.gov.uk>).

### **Unit Number / Unit Reference Number (URN)**

The Unit Reference Number is the unique code that the unit is given by the Regulator. This unit will be referenced on the final qualification certificate. The same unique code for the unit applies in whichever qualification the unit is included within. BIIAB also assign unique unit numbers which normally is consistent when the unit is used in multiple BIIAB qualifications.

### **Level**

This identifies the level of demand for the unit, but may be a different level to that of the overall qualification. The level of the units will be set according to National Occupational Standards and the level descriptors.

### **Credit**

When a whole unit is completed the learner will achieve credits specified by the number of hours' learning time it will take an average learner to complete the unit including the assessment.

### **Guided Learning Hours (GLH)**

The required number of hours that learning should take place under the immediate guidance or supervision of a lecturer, supervisor, tutor or other appropriate provider of education or training.

### **Learning Outcomes and Assessment Criteria**

Learning Outcomes are what the learner is expected to know, understand or be able to do upon successful completion of the unit.

Assessment Criteria are descriptions of the requirements that a learner is expected to meet in order to demonstrate that a learning outcome has been achieved.

## 14. Initial Registration

### Registration and Certification

Learners should be registered and certificated via BIIAB's On-line Registration and Certification Service (ORCS) [www.orcs.biiab.org](http://www.orcs.biiab.org). Please refer to BIIAB's Centre Guidance for using ORCS.

### Equal Opportunities and Diversity Policy

BIIAB has in place an equal opportunities policy, a copy can be found at <http://centrezon.bii.org/thehub/apprenticeships/qadocuments>.

BIIAB is committed to ensure that:

- Approved centres operate an equal opportunities policy
- Approved centres communicate the policy to staff and learners
- Approved centres have an effective complaints and appeals procedure of which both staff and learners are made aware
- Approved centres are aware of their responsibilities in providing equality of opportunity, particularly with regard to provision for learners with particular assessment requirements.

### Reasonable Adjustment Policy

Learners who require reasonable adjustments for their assessments must inform their assessor at the beginning of their course of their requirements. BIIAB has a reasonable adjustment policy in place, a copy of which is provided to all BIIAB approved centres and can be found at <http://centrezon.bii.org/thehub/apprenticeships/qadocuments>.

## 15. Qualification Review and Feedback

BIIAB is committed to the ongoing review of this qualification to ensure it remains fit for purpose.

This review approach involves the collation of evidence in the form of any information, comments and complaints received from users of this qualification in relation to its development, delivery and award.

BIIAB will give due regard to any credible evidence received which suggests that a change in approach to the development, delivery and award of this qualification is required in order to ensure that no adverse effects will result. This qualification will be reviewed and revised to ensure the approach remains appropriate and that it is fit for purpose.

## 16. Mandatory Units

The following units are mandatory for this qualification. For access to all optional units please visit [centrezone.bii.org](http://centrezone.bii.org).

<b>Unit Title</b>	<b>Understanding the sales environment</b>	
<b>BIIAB Reference</b>	<b>MS4</b>	
<b>Level</b>	<b>2</b>	
<b>Credit Value</b>	<b>3</b>	
<b>GLH</b>	<b>20</b>	
<b>Unit Reference No.</b>	<b>T/502/8204</b>	
<b>Learning Outcome - The learner will:</b>	<b>Assessment Criterion - The learner can:</b>	
1 Understand the sales market	1.1	Describe the characteristics of the sales market (e.g. hospitality, retail, business, public sector, not for profit sector)
	1.2	Explain the features, benefits and unique selling propositions of an organisation's products and/or services
	1.3	Describe an organisation's position in the market
	1.4	Describe an organisation's products and/or services in comparison with competitors' offerings
2 Understand different types of business focus in sales and marketing	2.1	Describe the differences between product focus, production focus, sales focus and customer focus
	2.2	Explain the effect of customer focus in an organisation
	2.3	Describe how to overcome the barriers to achieving customer focus
3 Know how to manage time in the sales environment	3.1	Explain the importance of effective time management and its impact on business objectives
	3.2	Explain how to differentiate between urgent and routine tasks
	3.3	Describe the tools and techniques available for effective time management
4 Understand the use of IT in sales	4.1	Explain the role, uses and importance of IT systems and information in sales
	4.2	Describe how to plan and organise information searches
	4.3	Describe how to carry out a data audit
	4.4	Describe how to identify issues and trends in sales-related data
	4.5	Explain the implications of inaccurate sales data
5 Understand how to communicate information in a sales environment	5.1	Describe the characteristics of effective communication in a sales environment
	5.2	Describe the information needs of the target audience (colleagues and customers)
	5.3	Describe the importance of and reason for checking the audience's understanding
	5.4	Explain the importance and uses of non-verbal communication to the sale
	5.5	Describe the advantages and disadvantages of different media used to communicate with customers

<b>Unit Title</b>	<b>Understanding sales techniques and processes</b>	
<b>BIIAB Reference</b>	<b>MS13</b>	
<b>Level</b>	<b>2</b>	
<b>Credit Value</b>	<b>5</b>	
<b>GLH</b>	<b>40</b>	
<b>Unit Reference No.</b>	<b>A/502/8205</b>	
<b>Learning Outcome - The learner will:</b>	<b>Assessment Criterion - The learner can:</b>	
1 Understand the sales cycle	1.1	Describe the characteristics of the sales cycle
	1.2	Explain how the different stages of the sales cycle affects the approach to the sale
	1.3	Describe the uses of the sales cycle in structuring and progressing sales contacts
2 Understand the buyer decision-making process	2.1	Describe an organisation's procedures for dealing with buyers
	2.2	Explain how buyer behaviour affects the achievement of targets
	2.3	Explain the distinction between customer wants and needs
	2.4	Explain the difference between consumer buyer decision-making and business-to-business decision-making
	2.5	Describe the pressures on customers that influence their buying behaviour
3 Understand how to generate and qualify sales leads	3.1	Explain how to segment customers
	3.2	Explain how to target market customers and prospects
	3.3	Describe how to source and gather information about the market and the prospect
	3.4	Explain the process for qualifying the sales contact
	3.5	Explain the importance of accurate record keeping
4 Understand how to sell by inbound telephone call	4.1	Explain the characteristics, advantages and disadvantages of inbound telephone selling
	4.2	Explain the characteristics of reactive selling
	4.3	Describe the verbal, listening and questioning techniques that are most suited to telephone selling
	4.4	Describe how to manage customer behaviour during inbound calls
	4.5	Describe how to interpret the customer's reaction as the sale progresses during inbound calls
	4.6	Describe how to involve the customer in closing the sale during inbound calls
5 Understand how to sell by outbound telephone call	5.1	Describe the preparations to be made prior to telephone selling
	5.2	Explain the characteristics, advantages and disadvantages of outbound telephone selling
	5.3	Explain the characteristics of proactive selling
	5.4	Describe how to manage customer behaviour during outbound calls
	5.5	Describe how to interpret the customer's reaction as the sale progresses during outbound calls
	5.6	Describe how to involve the customer in closing the sale during outbound calls

<b>Unit Title</b>	<b>Understanding sales techniques and processes</b>	
<b>BIIAB Reference</b>	<b>MS13</b>	
<b>Level</b>	<b>2</b>	
<b>Credit Value</b>	<b>5</b>	
<b>GLH</b>	<b>40</b>	
<b>Unit Reference No.</b>	<b>A/502/8205</b>	
<b>Learning Outcome - The learner will:</b>	<b>Assessment Criterion - The learner can:</b>	
6 Understand the principles of selling face to face	6.1	Explain the characteristics, advantages and disadvantages of face to face selling
	6.2	Explain the importance of preparing for the contact
	6.3	Describe the stages of selling face to face
	6.4	Describe how to manage customer behaviour during face to face sales contacts
	6.5	Describe how to interpret the customer's reaction as the sale progresses during face to face contacts
	6.6	Describe how to involve the customer in closing the sale during face to face contacts
7 Understand how to close a sale	7.1	Explain how to overcome objections
	7.2	Explain how to identify verbal and non-verbal buying signals
	7.3	Explain how to overcome barriers to closing the sale
	7.4	Explain how to identify further potential add-on, up-selling or cross-selling opportunities prior to closing the sale
	7.5	Describe different methods of closing sales
8 Understand how to process sales orders	8.1	Describe the process for ordering products and/or services
	8.2	Describe an organisation's payment methods
	8.3	Describe the requirements of customer credit checks
	8.4	Explain the role of the despatch function
	8.5	Describe order completion service standards
	8.6	Describe the importance of discounts and special offers
	8.7	Describe the importance of keeping the customer informed of developments relating to their order

<b>Unit Title</b>	<b>Understanding legal, regulatory and ethical requirements in sales or marketing</b>	
<b>BIIAB Reference</b>	<b>MS1</b>	
<b>Level</b>	<b>2</b>	
<b>Credit Value</b>	<b>2</b>	
<b>GLH</b>	<b>15</b>	
<b>Unit Reference No.</b>	<b>F/502/8206</b>	
<b>Learning Outcome - The learner will:</b>	<b>Assessment Criterion - The learner can:</b>	
1 Understand an organisation's procedures for dealing with legal, regulatory and ethical requirements relating to sales or marketing	1.1	Describe an organisation's procedures for raising legal, regulatory and ethical concerns
	1.2	Explain the scope of legal, regulatory and ethical requirements in sales or marketing
	1.3	Explain how the legal, regulatory and ethical requirements relate to the business of selling or marketing
	1.4	Describe internal and external sources of information on legal, regulatory and ethical requirements
	1.5	Explain how an "ethical approach" affects organisations in the sales or marketing environment
	1.6	Explain the importance of contract law in sales
2 Understand the legal, regulatory and ethical limits of the sales or marketing role	2.1	Explain the legal, regulatory and ethical requirements relevant to the role
	2.2	Describe the potential consequences of not complying with legal, regulatory or ethical requirements
	2.3	Explain the importance of working within the limits of the role, responsibilities and authority
	2.4	Explain the process for reporting legal, regulatory and ethical concerns
	2.5	Explain the importance of clarity of communication with the customer to ensure common understanding of agreements and expectations



<b>Title</b>	Principles of personal responsibilities and working in a business environment	
<b>BIIAB Unit Ref.</b>	CCO3	
<b>WBA Unit No.</b>	L/601/7638	
<b>Level</b>	2	
<b>Credit Value</b>	4	
<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	
When awarded credit for this unit, a learner will:	Assessment of this learning outcome will require a learner to demonstrate that they can:	
1 Know the employment rights and responsibilities of the employee and employer	1.1 Identify the main points of contracts of employment 1.2 Identify the main points of legislation affecting employers and employees 1.3 Identify where to find information on employment rights and responsibilities both internally and externally 1.4 Describe how representative bodies can support the employee 1.5 Identify employer and employee responsibilities for equality and diversity in a business environment 1.6 Explain the benefits of making sure equality and diversity procedures are followed in a business environment	
2 Understand the purpose of health, safety and security procedures in a business environment	2.1 Identify employer and employee responsibilities for health, safety and security in a business environment 2.2 Explain the purpose of following health, safety and security procedures in a business environment 2.3 Identify ways of maintaining a safe and secure environment in a business environment	
3 Understand how to communicate effectively with others	3.1 Describe different methods of communication 3.2 Explain how to choose the most appropriate method of communicating with others 3.3 Describe ways of actively listening	
4 Understand how to work with and support colleagues	4.1 Explain the purpose of agreeing standards for own work with others 4.2 Explain the purpose of taking on new	

	<p>challenges and adapting to change</p> <p>4.3 Explain the purpose of treating others with honesty and consideration</p>
5 Know how to plan own work and be accountable to others	<p>5.1 Explain the purpose of meeting work standards and deadlines when completing tasks</p> <p>5.2 Identify ways of planning own work</p> <p>5.3 Compare ways of keeping other people informed about progress</p>
6 Understand the purpose of improving own performance in a business environment and how to do so	<p>6.1 Explain the purpose of continuously improving own performance in a business environment</p> <p>6.2 Describe ways of improving own performance in a business environment</p> <p>6.3 Identify different types of career pathways that are available</p>
7 Understand the types of problems that may occur in a business environment and how to deal with them	<p>7.1 Identify the types of problems that may occur in a business environment</p> <p>7.2 Explain ways of dealing with problems that may occur in a business environment</p> <p>7.3 Explain how and when to refer problems to relevant colleagues</p>
<b>Additional Information about the unit</b>	
Unit purpose and aim(s)	This unit concerns the principles of personal responsibilities and working in a business environment.
Support for the unit from an SSC or other appropriate body (if required)	CfA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law
Name of unit owner	Skills CFA
Unit guided learning hours	32

## 17. BIIAB Level 2 Certificate in Principles of Sales Sign-Off Sheet

To achieve the BIIAB Level 2 Certificate in Principles of Sales learners **must** gain a **total of 18** credits. This **must** consist of:

- **Minimum total** credit: **18**
- Mandatory Group A **minimum** credit: **14**
- Optional Unit Group B **minimum** credit: **4**
- A **minimum of 18** credits **must** be achieved through the completion of units at **Level 2** and above
- GLH: **131**
- TQT: **180**

Listed below are the qualification units.

### Mandatory Group A

Unit No.	URN	Unit Title	Credit	Level	GLH	Assessment Method
MS4	T/502/8204	Understanding the sales environment	3	2	20	Assessment Knowledge Module (AKM)
MS13	A/502/8205	Understanding sales techniques and processes	5	2	40	Assessment Knowledge Module (AKM)
MS1	F/502/8206	Understanding legal, regulatory and ethical requirements in sales or marketing	2	2	15	Assessment Knowledge Module (AKM)
CCO3	L/601/7638	Principles of personal responsibilities and working in a business environment	4	2	32	Assessment Knowledge Module (AKM)

**Optional Group B**

Unit No.	URN	Unit Title	Credit	Level	GLH	Assessment Method
MS5	L/502/8208	Understanding sales targets	2	2	13	Assessment Knowledge Module (AKM)
MS6	R/502/8209	Understanding business awareness in sales	2	2	11	Assessment Knowledge Module (AKM)
MS7	L/502/8211	Principles of presentations and demonstrations in sales	2	2	15	Assessment Knowledge Module (AKM)
MS8	A/502/8219	Principles of selling at trade fairs and exhibitions	2	2	18	Assessment Knowledge Module (AKM)
MS9	J/502/8224	Customer service in sales	3	2	25	Assessment Knowledge Module (AKM)
MS2	F/502/8223	Understanding the relationship between sales and marketing	3	3	21	Assessment Knowledge Module (AKM)
MS10	Y/502/8227	Principles of online selling	3	3	24	Assessment Knowledge Module (AKM)
MS11	H/502/8232	Understanding customers' creditworthiness for sales	2	3	16	Assessment Knowledge Module (AKM)
MS12	M/502/8234	Competitor analysis in the sales environment	2	3	20	Assessment Knowledge Module (AKM)

**Barred units**

This unit	Is barred against this unit
MS7 Principles of presentations and demonstrations in sales (L/502/8211)	MS8 Principles of selling at trade fairs and exhibitions (A/502/8219)

**Mandatory Group A**

Unit No.	URN	Unit Title	Learner Signature	Date	Assessor Signature	Date	Internal Quality Assurer signature (if sampled)	Date
MS4	T/502/8204	Understanding the sales environment						
MS13	A/502/8205	Understanding sales techniques and processes						
MS1	F/502/8206	Understanding legal, regulatory and ethical requirements in sales or marketing						
CCO3	L/601/7638	Principles of personal responsibilities and working in a business environment						

Optional Group B

Unit No.	URN	Unit Title	Learner Signature	Date	Assessor Signature	Date	Internal Quality Assurer signature (if sampled)	Date
MS5	L/502/8208	Understanding sales targets						
MS6	R/502/8209	Understanding business awareness in sales						
MS7	L/502/8211	Principles of presentations and demonstrations in sales						
MS8	A/502/8219	Principles of selling at trade fairs and exhibitions						
MS9	J/502/8224	Customer service in sales						
MS2	F/502/8223	Understanding the relationship between sales and marketing						
MS10	Y/502/8227	Principles of online selling						
MS11	H/502/8232	Understanding customers' creditworthiness for sales						
MS12	M/502/8234	Competitor analysis in the sales environment						

## Learner Summative Reflection



The purpose of this summative reflection is to enable you, the learner, to reflect on your qualification, what you have learnt and how you have been able to apply this within your work role.

You will need to complete your statement in the space provided below and sign and date the document. Alternatively you and your assessor may wish to record your reflection on a voice recorder.

**Learner Name:** \_\_\_\_\_

### Qualification Unit Summary

Unit No.	Completion Date	Assessor Signature	Unit No.	Completion Date	Assessor Signature

### Learner Reflection

Learner Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Assessor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## Notices

This book does not purport to contain an authoritative or definitive statement of the law or practice on any subject and the publishers supply the information on the strict understanding that no legal or other liability attaches to them in respect of it. References to sources of further guidance or information have been made where appropriate.

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