

# REC Level 4 NVQ Diploma in Recruitment Syllabus

- Candidates must achieve: all 13 Mandatory units, providing 53 credits & 10 credits from any combination of Optional units of which at least 5 must be at level 4

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The REC Level 4 NVQ Diploma in Recruitment has been developed to provide managers and potential managers in recruitment with an industry-recognised qualification at level 4.

To achieve an NVQ, candidates must prove that they have the ability (competence) to carry out their role to the required standard. We developed the NVQs in conjunction with the CFA and have based the criteria on the National Occupational Standards (NOS) that describe the 'competencies' expected in Recruitment. The NVQ's will be assessed through demonstration and a portfolio of evidence that reflects the assessment criteria laid out below which in-turn will demonstrate the following learning outcomes:

1. Confirm clients' staffing requirements
2. Analyse the role requirements of staff sought
3. Confirm recruitment arrangements with clients
4. Agree with clients how recruitment needs will be met
5. Develop a recruitment resourcing plan

6. Shortlist candidates
7. Present pre-selected candidates to clients
8. Plan for candidate assessments
9. Conduct candidate assessments
10. Understand the basis for choosing selection methods and media
11. Develop and maintain a candidate database
12. Match candidates
13. Present candidates to clients
14. Use networking tools to create strategic relationships in recruitment
15. Develop strategic relationships with clients in recruitment
16. Sustain strategic relationships with clients in recruitment
17. Plan a candidate attraction campaign
18. Write job advertisements
19. Implement candidate attraction campaign
20. Build consultative relationships with potential candidates
21. Establish candidates' needs
22. Support candidates
23. Coach candidates
24. Review candidates' progress
25. Exchange feedback with candidates
26. Be able to analyse customers' needs
27. Be able to analyse the market using research tools and techniques
28. Be able to communicate research findings to inform managerial decisions
29. Understand methods of monitoring sales team performance
30. Be able to manage performance of the sales team
31. Understand how to write sales proposals
32. Be able to develop sales proposals
33. Be able to evaluate the proposal
34. Understand the purpose of budgets
35. Understand how to manage budgets
36. Understand how to report performance against budgets
37. Be able to manage budgets
38. Be able to monitor budgets
39. Understand the factors for consideration in the preparation of sales presentations
40. Be able to prepare a sales presentation
41. Understand how to deliver sales presentations
42. Be able to deliver a sales presentation

## Identify client recruitment requirements

### REC 3-2

Level	3
Credit Value	3
GLH	10

### Unit aims

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

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Confirm clients' staffing requirements
2. Analyse the role requirements of staff sought
3. Confirm recruitment arrangements with clients

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Confirm clients' staffing requirements

- 1.1 Establish the numbers of people needed in which roles
- 1.2 Establish the client's policies and requirements for experience, skills, qualifications, attributes and any other relevant candidate requirements
- 1.3 Clarify the contractual terms of the staff sought by the clients

#### 2. Analyse the role requirements of staff sought

- 2.1 Explain the purpose, methods and suitability of different methods of job analysis
- 2.2 Identify the requirements of the roles using valid sources of information
- 2.3 Record role profiles, job descriptions, person specifications and/or vacancy details in the agreed format(s)
- 2.4 Explain the distinctions between role profiles, job descriptions and person specifications and the information needed for each

#### 3. Confirm recruitment arrangements with clients

- 3.1 Confirm the services to be offered
- 3.2 Confirm terms of business and timescales
- 3.3 Ensure that agreements meet legal and ethical requirements

## Develop resourcing plan for recruitment services REC 3-3

Level	3
Credit Value	4
GLH	15

### Unit aims

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

### Learning outcomes

On successful completion of this unit the learner will be able to:

1. Agree with clients how recruitment needs will be met
2. Develop a recruitment resourcing plan

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Agree with clients how recruitment needs will be met

- 1.1 Clarify the client's recruitment and selection preferences and/or processes
- 1.2 Recommend the optimum method(s) of recruitment and selection for a range of roles
- 1.3 Advise the client on any potential adverse effect associated with recruitment methods
- 1.4 Ensure all recruitment policies, materials and processes meet legal and ethical requirements

#### 2. Develop a recruitment resourcing plan

- 2.1 Ensure the plan includes SMART objectives, candidate attraction plan, application method(s), circulation arrangements, quality standards, resource allocations, contingencies, success criteria, validation processes and evaluation mechanisms
- 2.2 Ensure the plan specifies the chosen recruitment and selection method(s) and is achievable within budget and timescale
- 2.3 Ensure the resourcing plan meets legal and ethical requirements

## Pre-select Candidates

### REC 3-4

Level	3
Credit Value	3
GLH	10

### Unit aims

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

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Shortlist candidates
2. Present pre-selected candidates to clients

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Shortlist candidates

- 1.1 Assess candidates against the agreed criteria
- 1.2 Identify any attractive prospects who do not meet the criteria but who offer potentially valuable alternatives
- 1.3 Inform those who are not pre-selected of the outcome in accordance with organisational standards and procedures
- 1.4 Confirm the interest, identity, suitability and availability of those pre-selected
- 1.5 Ensure all pre-selection processes meet legal and ethical requirements

#### 2. Present pre-selected candidates to clients

- 2.1 Present shortlisted candidates to clients in the agreed format and timescale
- 2.2 Promote the shortlisted candidates, explaining how they meet the client's requirements
- 2.3 Agree with the client which candidates they will consider

# Carry Out Candidate Assessment

## RECTC 4-2

Level	4
Credit Value	4
GLH	20

### Unit aims

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

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Plan for candidate assessments
2. Conduct candidate assessments
3. Understand the basis for choosing selection methods and media

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Plan for candidate assessments

- 1.1 Specify the objectives of the assessment process(es)
- 1.2 Assemble the resources needed for the assessment process
- 1.3 Plan the structure, validity and reliability of the assessment and brief those making assessments
- 1.4 Invite candidates to carry out the assessment process(es) in accordance with organisational standards and procedures

#### 2. Conduct candidate assessments

- 2.1 Carry out assessments in accordance with the resourcing plan, job and personal specification and good industry practice in the use of assessment techniques
- 2.2 Make assessments that are objective and evidence-based
- 2.3 Record the outcomes of the assessment in accordance with organisational standards and procedures
- 2.4 Inform candidates of the next step(s) and/or results in the process in accordance with organisational standards and procedures
- 2.5 Ensure the assessment process(es) meet legal and ethical requirements

#### 3. Understand the basis for choosing selection methods and media

- 3.1 Explain the features, requirements, advantages and disadvantages of a range of selection methods (pre-selection, interviewing (biographical and competence assessment), assessment centres, psychometric testing)
- 3.2 Explain why some selection methods are better suited to some roles than others

# Match and present candidates to employers

## REC 3-6

Level	3
Credit Value	4
GLH	30

### Unit aims

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

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Develop and maintain a candidate database
2. Match candidates
3. Present candidates to clients

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Develop and maintain a candidate database

- 1.1 Agree the criteria by which candidates will be included on the candidate database
- 1.2 Obtain sufficient relevant information about candidates to enable matching to take place
- 1.3 Keep the candidate database up to date

#### 2. Match candidates

- 2.1 Identify potentially suitable job opportunities that meet candidates' specifications and candidates who meet client specifications
- 2.2 Promote suitable candidates to clients and suitable clients to candidates
- 2.3 Inform candidates of the nature and details of the selection assessment

#### 3. Present candidates to clients

- 3.1 Present candidates to clients in the agreed format and timescale
- 3.2 Promote shortlisted candidates, explaining how they meet the client's requirements
- 3.3 Agree with the client which candidates will be accepted
- 3.4 Record placements and carry out associated administrative and financial actions in accordance with organisational procedures
- 3.5 Provide constructive feedback to candidates on the results of the submission and assessment
- 3.6 Use feedback to make improvements to the recruitment process
- 3.7 Ensure all recruitment policies, materials and processes meet legal and ethical requirements

# Build and sustain strategic relationships with clients

## REC 4-3

Level	4
Credit Value	6
GLH	30

### Unit aims

This unit concerns using networking tools to create strategic relationships in recruitment, developing strategic relationships with clients and sustaining strategic relationships with clients in recruitment

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Use networking tools to create strategic relationships in recruitment
2. Develop strategic relationships with clients in recruitment
3. Sustain strategic relationships with clients in recruitment

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Use networking tools to create strategic relationships in recruitment

- 1.1 Analyse the characteristics of productive recruitment networks
- 1.2 Maximise the opportunities provided by different social media for recruitment networking and marketing purposes (e.g. Facebook, blogs)
- 1.3 Analyse methods of enhancing and using a personal “brand”

#### 2. Develop strategic relationships with clients in recruitment

- 2.1 Classify the nature of different kinds of recruitment relationship (existing lapsed, potential)
- 2.2 Explain the client’s needs, preferences, priorities, policies and problems as they relate to recruitment
- 2.3 Develop rapport and trust with the client, offering mutually acceptable benefits of collaboration

#### 3. Sustain strategic relationships with clients in recruitment

- 3.1 Analyse the significance of identifying, monitoring, managing and exceeding client expectations
- 3.2 Assess the value of loyalty in recruitment business relationships
- 3.3 Analyse the concept and use of account management in recruitment
- 3.4 Create opportunities to maintain productive contact with recruitment clients
- 3.5 Evaluate how the conduct of business contributes to sustaining relationships (e.g. client satisfaction surveys, Service Level Agreements, business reviews, performance and efficiency indicators)
- 3.6 Ensure all activities and records meet legal and ethical requirements



# Market for potential candidates

## REC 4-4

Level	4
Credit Value	4
GLH	15

### Unit aims

This unit concerns planning a candidate attraction campaigns, writing job advertisements, implementing candidate attraction campaigns and building consultative relationships with potential candidates

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Plan a candidate attraction campaign
2. Write job advertisements
3. Implement candidate attraction campaign
4. Build consultative relationships with potential candidates

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Plan a candidate attraction campaign

- 1.1 Analyse the efficiency and cost-effectiveness of a range of sources that are likely to reach potential candidates (networking, social media, job adverts, online searches, e-recruitment, consultancies)
- 1.2 Develop an implementation plan that specifies objectives, actions, responsibilities, budget, timescale and success criteria
- 1.3 Select marketing methods and media that are likely to reach the desired candidate group(s)

#### 2. Write job advertisements

- 2.1 Create job advertisements using the principles of effective job advertisement design (Attention, Desire, Interest, Action (AIDA)) that capture all the required information using relevant and accurate information sources
- 2.2 Analyse the suitability of different newspapers and publications for reaching the type and quantity of desirable candidates
- 2.3 Ensure all recruitment advertising, materials and processes meet legal and ethical requirements

#### 3. Implement candidate attraction campaign

- 3.1 Deliver the plan within budget and timescale
- 3.2 Address risks, problems and variances from expectations in accordance with the plan
- 3.3 Keep stakeholders up to date with progress, developments and issues
- 3.4 Record and report on the outcomes of the implementation in accordance with the plan and organisational procedures

#### **4. Build consultative relationships with potential candidates**

- 4.1 Qualify candidates in accordance with organisational standards and procedures
- 4.2 Make recommendations and provide advice that would enhance candidates' employability and career prospects
- 4.3 Use client network opportunities to promote the candidate for suitable positions
- 4.4 Apply customer service techniques in building productive relationships with potential candidates
- 4.5 Assess the importance of managing candidates' expectations
- 4.6 Record all contact with and information about candidates that is likely to add to understanding about candidates and clients

## Coach and support candidates REC 4-5

Level	4
Credit Value	5
GLH	30

### Unit aims

This unit concerns establishing candidates' needs, supporting and coaching candidates

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Establish candidates' needs
2. Support candidates
3. Coach candidates

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Establish candidates' needs

- 1.1 Identify the nature of candidates' immediate needs and long term aspirations
- 1.2 Agree expectations, communications, availability, flexibilities and action plans
- 1.3 Record agreements and needs in accordance with organisational procedures

#### 2. Support candidates

- 2.1 Take steps to find suitable job and career opportunities for candidates
- 2.2 Promote candidates to employers for suitable positions
- 2.3 Refer candidates to sources of specialist help that are likely to enhance their employability
- 2.4 Negotiate on behalf of candidates to optimum effect (e.g. terms, dates, counter offers)

#### 3. Coach candidates

- 3.1 Brief candidates on employers' requirements and preferences
- 3.2 Agree targeted, specific programmes of support that are tailored to candidates' identified needs and aspirations
- 3.3 Agree actions (e.g. research, interview practice, changes to personal presentation) that will enhance candidates' employability
- 3.4 Provide suitable support to help candidates meet their objectives
- 3.5 Provide constructive and sensitive feedback to candidates on their strengths, areas for development and job-search performance
- 3.6 Ensure all recruitment policies, materials and processes meet legal and ethical requirements

## Carry out candidate debriefing REC 3-10

Level	3
Credit Value	4
GLH	20

### Unit aims

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

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Review candidates' progress
2. Exchange feedback with candidates

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Review candidates' progress

- 1.1 Keep candidate records and the database of their job search-related activities up to date
- 1.2 Review the effectiveness of agreed action plans at agreed intervals and adapt them in the light of changing circumstances
- 1.3 Use information from a range of sources to add to the understanding of candidates' needs and expectations

#### 2. Exchange feedback with candidates

- 2.1 Provide timely feedback that is constructive, accurate, sensitive and evidence-based
- 2.2 Give candidates feedback at all stages of the job search programme
- 2.3 Optimise the personal and business brand through productive relationships with candidates
- 2.4 Ensure the realism of candidates' expectations, explaining why some may be unachievable
- 2.5 Ensure all recruitment policies and advice given meet legal and ethical requirement

# Analyse the market in which your organisation operates

## F9

Level	4
Credit Value	5
GLH	25

### Unit aims

This unit will ensure that learners are able to analyse an organisation's market position and trends. Learners can analyse customer needs and communicate to key stakeholders

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Be able to analyse customers' needs
2. Be able to analyse the market using research tools and techniques
3. Be able to communicate research findings to inform managerial decisions

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Be able to analyse customers' needs

- 1.1 Assess the economic environment in which your organisation operates
- 1.2 Evaluate your customers' needs and relate to own organisation
- 1.3 Analyse customer perception of own products/ services in comparison to competitors

#### 2. Be able to analyse the market using research tools and techniques

- 2.1 Identify and utilise market research specialists if necessary
- 2.2 Analyse current and future macro and micro economic trends in own sector
- 2.3 Use recognised research tools to assess market trends and opportunities for growth

#### 3. Be able to communicate research findings to inform managerial decisions

- 3.1 Produce a report based on research findings
- 3.2 Communicate the report to key individuals within own organisation
- 3.3 Evaluate feedback from key individuals
- 3.4 Revise and communicate updated report to key individuals
- 3.5 Monitor the economic environment and changes in customers' needs

# Buyer behaviour in sales situations

## SAL 3-4

Level	3
Credit Value	3
GLH	27

### Unit aims

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the impact of different models of buyer behaviour on the sales cycle
2. Be able to respond to the buyer at each stage of the decision making process

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### **1. Understand the impact of different models of buyer behaviour on the sales cycle**

- 1.1 Explain the consumer buying decision-making process
- 1.2 Explain how the consumer buying decision-making process affects the sales cycle
- 1.3 Describe the influences that affect the consumer decision-making process
- 1.4 Explain the organisational buying decision-making process
- 1.5 Explain how the organisational buying decision-making process affects the sales cycle
- 1.6 Describe the influences that affect the organisational buying decision-making process
- 1.7 Explain the impact of the different roles within the decision-making unit on the sales cycle

#### **2. Be able to respond to the buyer at each stage of the decision making process**

- 2.1 Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process
- 2.2 Respond to different decision-makers in a sales situation in a way that is appropriate to their role
- 2.3 Use objections as buying opportunities
- 2.4 Confirm solution(s) offered meet the needs and wants of decision-makers

# Negotiating, handling objections and closing sales

## SAL 3-1

Level	3
Credit Value	4
GLH	22

### Unit aims

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand how to handle objections and negotiate with the customer
2. Be able to prepare for objections and negotiation with the customer
3. Be able to handle objections
4. Be able to negotiate with the customer
5. Be able to close the sale following negotiation

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Understand how to handle objections and negotiate with the customer

- 1.1 Describe the scope of authority and responsibility when dealing with objections
- 1.2 Identify the resources available to counter the sales objections
- 1.3 Describe how to plan and prepare for negotiation
- 1.4 Describe how to use testimonials to progress a sale
- 1.5 Explain the advantages and disadvantages of different methods of closing a sale
- 1.6 Explain organisational procedures for documenting the negotiated sale

#### 2. Be able to prepare for objections and negotiation with the customer

- 2.1 Identify possible sales objections and appropriate responses prior to dealing with the customer
- 2.2 Confirm authorisation to negotiate
- 2.3 Prepare a negotiation plan that is capable of providing a mutually acceptable outcome

#### 3. Be able to handle objections

- 3.1 Identify customer needs and wants in relation to objections by using a variety of questioning techniques
- 3.2 Identify and prioritise customers' concerns
- 3.3 Provide evidence to the customer of the strengths of the organisation's products or services
- 3.4 Confirm with the customer that the objection(s) have been overcome
- 3.5 Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals

#### 4. Be able to negotiate with the customer

- 4.1 Carry out negotiations according to negotiation plan
- 4.2 Promote the benefits of what is being offered to the customer
- 4.3 Explain to the customer when and why no further adjustment is possible
- 4.4 Obtain support to progress negotiation that is outside own level of authority

#### 5. Be able to close the sale following negotiation

- 5.1 Apply a trial close in accordance with the negotiation plan
- 5.2 Respond to any further objections and concerns
- 5.3 Identify and make use of potential add-on, up-selling or cross-selling opportunities
- 5.4 Summarise agreements made in accordance with organisational procedures and close the sale

# Develop, maintain and review personal networks

## MSC A3

Level	4
Credit Value	4
GLH	25

### Unit aims

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the benefits of networking and the need for data privacy
2. Be able to develop a personal network of contacts
3. Be able to review networking relationships

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### **1. Understand the benefits of networking and the need for data privacy**

- 1.1 Evaluate the benefits of networking with individuals and organisations
- 1.2 Identify individuals and organisations that would provide benefits to own organisation and networks
- 1.3 Explain the need for confidentiality with networking contacts

#### **2. Be able to develop a personal network of contacts**

- 2.1 Develop networks that will provide personal and organisational benefit
- 2.2 Develop guidelines for working with networks in line with organisational procedures

#### **3. Be able to review networking relationships**

- 3.1 Assess the value own current personal network
- 3.2 Evaluate own experience with existing contacts and use these to inform future actions



# Advise clients on strategic recruitment planning

## REC 4-1

Level	4
Credit Value	5
GLH	20

### Unit aims

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

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the nature of human resource planning
2. Define clients' strategic recruitment needs
3. Evaluate the effectiveness of the recruitment strategy

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Understand the nature of human resource planning

- 1.1 Explain the impact of different organisational structures in the public and private sectors on the planning process
- 1.2 Assess the considerations to be taken into account in human resource planning
- 1.3 Analyse the role of recruitment in human resource planning

#### 2. Define clients' strategic recruitment needs

- 2.1 Analyse employment-related trends and patterns in the client's industry
- 2.2 Determine the client's current and future workforce needs, taking the organisation's structure and position in the lifecycle into account
- 2.3 Analyse the availability of suitable personnel in the labour market
- 2.4 Evaluate the feasibility, timescale and costs of alternative recruitment solutions
- 2.5 Calculate the cost of hiring time, fees/staff costs to the client, retention and attrition costs for replacement staff
- 2.6 Present a business case with recommendations to the client, showing costs, benefits and performance measures (long and short term) of the proposed recruitment strategy
- 2.7 Agree mutually acceptable terms and conditions of business with the client
- 2.8 Ensure all recruitment policies, materials and processes meet legal

#### 3. Evaluate the effectiveness of the recruitment strategy

- 3.1 Agree indicators that are capable of measuring the effectiveness of the strategy and key milestones
- 3.2 Use valid methods of evaluation
- 3.3 Identify the degree of success in meeting the client's objectives

# Co-ordinate flexible workers

## REC 3-11

Level	3
Credit Value	6
GLH	40

### Unit aims

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

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Place flexible workers with clients
2. Manage clients' bookings for flexible staff
3. Co-ordinate the needs of flexible workers

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Place flexible workers with clients

- 1.1 Confirm the roles, requirements and duration of appointments for flexible workers in accordance with current legislation
- 1.2 Agree rates of pay and any other benefits and conditions in accordance with current legislation
- 1.3 Carry out any necessary pre-appointment checks
- 1.4 Place suitable flexible workers within the agreed timescale
- 1.5 Use feedback from continuing contact with flexible workers to make improvements

#### 2. Manage clients' bookings for flexible staff

- 2.1 Confirm the suitability and efficiency of flexible staff placed with employers
- 2.2 Keep databases of flexible workers up to date
- 2.3 Ensure the accuracy of contractual records
- 2.4 Use information and feedback from clients to enhance the service
- 2.5 Arrange for payments to be made in accordance with agreements

#### 3. Co-ordinate the needs of flexible workers

- 3.1 Maintain current and accurate records of flexible workers' skills and availability
- 3.2 Maintain the continuing commitment of inactive flexible workers through regular contact
- 3.3 Market for new flexible workers in accordance with the candidate attraction plan
- 3.4 Ensure all recruitment policies, materials and processes meet legal and ethical requirements

# Conduct market research

## MK 3-2

Level	3
Credit Value	6
GLH	

### Unit aims

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

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Be able to identify the need for market research
2. Be able to design market research projects
3. Be able to manage market research data collection

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Be able to identify the need for market research

- 1.1 Establish the nature of the marketing issue for which information is needed
- 1.2 Agree the research budget and timescale
- 1.3 Agree specific, measurable, realistic and time-bound objectives

#### 2. Be able to design market research projects

- 2.1 Determine the research method(s) and instrument(s) best suited to obtaining the required information within budget
- 2.2 Establish the sources of reliable quantitative and qualitative information most likely to yield the required information
- 2.3 Develop a research project proposal and rationale that addresses the research objectives
- 2.4 Obtain approval to the specified actions, responsibilities, timescales and budget for the research
- 2.5 Explain the strengths and limitations of the ranges of proposed research methods
- 2.6 Explain the use of a sample in designing market research projects
- 2.7 Explain the importance of validating information

#### 3. Be able to manage market research data collection

- 3.1 Ensure that the team is briefed on the objectives and data collection tasks
- 3.2 Ensure that data collection activities are carried out in accordance with the market research plan
- 3.3 Provide progress and variance reports in accordance with the data collection plan
- 3.4 Address issues and variances in accordance with the market research plan
- 3.5 Ensure that the data collection is conducted in accordance with legal, regulatory and industry requirements and standards
- 3.6 Present the data in the agreed format within the agreed timescale
- 3.7 Evaluate the effectiveness of the market research data collection against agreed criteria

# Monitoring and managing sales team performance

## SAL 4-2

Level	4
Credit Value	5
GLH	32

### Unit aims

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand methods of monitoring sales team performance
2. Be able to manage performance of the sales team

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Understand methods of monitoring sales team performance

- 1.1 Explain the importance of monitoring sales team performance
- 1.2 Explain the importance of giving feedback on performance
- 1.3 Describe the role of key performance indicators in monitoring sales team performance
- 1.4 Explain the importance of encouraging sales team members to ask questions, make suggestions and seek clarification
- 1.5 Explain the use of sales-related information in managing the performance of sales team members in formal performance appraisals
- 1.6 Explain the use of tools in monitoring performance of the team

#### 2. Be able to manage performance of the sales team

- 2.1 Determine key performance indicators for monitoring the performance of individual sales staff that are appropriate for their targets and objectives
- 2.2 Plan the work of the sales team, identifying priorities, resources and/or critical activities
- 2.3 Provide practical help to sales staff in support of achieving their sales objectives
- 2.4 Monitor the quantity and quality of sales team members' work against agreed key performance indicators
- 2.5 Provide feedback to sales staff on their sales performance
- 2.6 Give public recognition to successful performance
- 2.7 Agree ways of improving performance in cases of unacceptable performance

# Developing sales proposals

## SAL 4-3

Level	4
Credit Value	5
GLH	30

### Unit aims

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand how to write sales proposals
2. Be able to develop sales proposals
3. Be able to evaluate the proposal

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Understand how to write sales proposals

- 1.1 Explain how to write a proposal that differentiates the offer from that of a competitor and promotes organisational strengths
- 1.2 Describe how to put together a persuasive argument based on quantitative and qualitative evidence
- 1.3 Explain the importance of addressing the brief in tender documentation
- 1.4 Explain the importance of using the “house style” in proposals
- 1.5 Explain the legal and ethical issues relating to sales proposals
- 1.6 Explain the client’s procedures for submitting sales proposals

#### 2. Be able to develop sales proposals

- 2.1 Ensure the prospect’s or customer’s requirements are addressed in the proposal
- 2.2 Ensure that all identified issues requiring clarification are resolved before the proposal is finalised
- 2.3 Identify the conditions and constraints which need to be included within the proposal in order to protect the organisation’s interests
- 2.4 Present the proposal in “house style”
- 2.5 Ensure that the proposal is based on market factors
- 2.6 Provide the required level of detail as briefed by the prospect or customer
- 2.7 Ensure that the price reflects the value within the proposal
- 2.8 Gain internal approval before submission
- 2.9 Supply the proposal within the agreed timescale

#### 3. Be able to evaluate the proposal

- 3.1 Obtain feedback from colleagues and the customer on the proposal
- 3.2 Evaluate the outcome of the proposal and recommend improvements for the future

# Manage budgets

## CFABAA533

Level	4
Credit Value	5
GLH	29

### Unit aims

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the purpose of budgets
2. Understand how to manage budgets
3. Understand how to report performance against budgets
4. Be able to manage budgets
5. Be able to monitor budgets

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Understand the purpose of budgets

- 1.1 Explain the purpose and benefits of managing financial resources effectively and efficiently
- 1.2 Identify legal, regulatory and organisational requirements for managing a budget
- 1.3 Describe different types of budgetary systems and their features

#### 2. Understand how to manage budgets

- 2.1 Describe methods of monitoring, controlling and recording income and expenditure
- 2.2 Describe ways in which costs may be minimised in own area of responsibility
- 2.3 Identify situations in which corrective action may be needed
- 2.4 Describe the scope of own authority for managing a budget and authorising expenditure

#### 3. Understand how to report performance against budgets

- 3.1 Explain the purpose and benefits of reporting information on performance against budget
- 3.2 Explain how to check the accuracy of budget calculations
- 3.3 Explain the purpose and benefits of recording information that will help with the future preparation of budgets

#### 4. Understand how to report performance against budgets

- 4.1 Control budget performance within limits and deadlines
- 4.2 Analyse and take action to minimise costs where possible
- 4.3 Take corrective action to make sure of best value for money
- 4.4 Authorise expenditure within the scope of own authority

#### 5. Understand how to report performance against budgets

- 5.1 Record transactions as required
- 5.2 Produce information on performance against budget when required
- 5.3 Make sure all calculations are accurate
- 5.4 Record information that will help the preparation of future budgets

# Preparing and delivering a sales presentation

## SAL 3-7

Level	3
Credit Value	4
GLH	28

### Unit aims

### Learning outcomes

On successful completion of this unit, the learner will be able to:

1. Understand the factors for consideration in the preparation of sales presentations
2. Be able to prepare a sales presentation
3. Understand how to deliver sales presentations
4. Be able to deliver a sales presentation

*Assessment of the learning outcomes will require a learner to demonstrate that they can:*

#### 1. Understand the factors for consideration in the preparation of sales presentations

- 1.1 Explain the importance of presentations to the achievement of sales targets
- 1.2 Explain the difference between formal and informal presentations
- 1.3 Explain the importance of setting aims and objectives when preparing a presentation
- 1.4 Describe how customer characteristics and buying behaviours will influence a presentation
- 1.5 Identify who to go to for support relating to the presentation
- 1.6 Explain the legal, social and ethical constraints that need to be considered when designing and delivering sales presentations

#### 2. Be able to prepare a sales presentation

- 2.1 Describe the needs of the customer or audience
- 2.2 Set objectives for the sales presentation ensuring they reflect the customers' or audience's needs and interests
- 2.3 Assess the suitability of the venue for the presentation, and review issues relating to its size, acoustics and layout
- 2.4 Identify and prepare resources for delivery of the presentation
- 2.5 Obtain promotional material that will enhance the presentation
- 2.6 Include the product/service benefits and/or unique selling propositions in the presentation
- 2.7 Structure the presentation in line with its objectives
- 2.8 Ensure the presentation complements any proposal already supplied to the customer
- 2.9 Ensure the presentation can be delivered within the agreed timescale

#### 3. Understand how to deliver sales presentations

- 3.1 Describe how to use verbal and non-verbal communications in presentations
- 3.2 Explain the importance of rehearsing a presentation
- 3.3 Describe techniques to capture and retain the audience's attention
- 3.4 Describe the organisational methods for reporting and recording the outcome of presentations

#### **4. Be able to deliver a sales presentation**

- 4.1 Use pitch, tone and pace of delivery to engage the audience
- 4.2 Deliver a presentation that captures and retains the audience's attention
- 4.3 Use visual aids and/or publicity materials to support the presentation
- 4.4 Provide the audience with opportunities to ask questions and raise objections
- 4.5 Respond to questions, concerns and objections from the customer or audience in a way that gives a positive image of the organisation and its products and/or services
- 4.6 Gain commitment to proceed with the sale
- 4.7 Evaluate the effectiveness of the presentation in the light of stakeholder feedback and subsequent sales related activities and outcomes