Qualification Specification

Highfield Level 2 NVQ Certificate in Recruitment Resourcing (RQF)

Qualification Number: 601/7920/X

Version 1.2 June 2023

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Highfield Level 2 NVQ Certificate in Recruitment Resourcing (RQF)

Introduction

This qualification specification is designed to outline all you need to know to offer this qualification at your centre. If you have any further questions, please contact your account manager

Qualification regulation and support

The Highfield Level 2 NVQ Certificate in Recruitment Resourcing (RQF) has been developed and is awarded by Highfield Qualifications and sits on the Regulated Qualifications Framework (RQF). The RQF is a qualification framework regulated by Ofqual and CCEA regulation. The qualification is also regulated by Qualifications Wales.

The qualification is also supported by Skills CFA, the sector skills council promoting skills and qualifications in the workplace across the UK for a whole range of business skills, including Recruitment.

Key facts

Qualification number:	601/7920/X
Learning aim reference:	6017920X
Credit value:	28
Assessment method:	Portfolio of Evidence
Guided learning hours (GLH):	132
Total qualification time (TQT):	280

Qualification overview and objective

The objective of the qualification is to support learners in a recruitment resourcing role.

This qualification is designed for those learners wishing to gain a nationally recognised qualification in recruitment resourcing. It will attract new talent into the Recruitment sector and will help to up-skill the workforce to meet employer skills priorities and to further professionalise the sector. It forms the competency component of the Intermediate Apprenticeship in Recruitment.

Entry requirements

To register on to this qualification, learners are required to meet the following entry requirements:

- 16 years of age or above; and
- it is advised that learners have a minimum of Level 1 literacy and numeracy.

Geographical coverage

This qualification is suitable for delivery in England, Wales and Northern Ireland.

Guidance on delivery

The total qualification time (TQT) for this qualification is 280 hours and of this 132 are recommended as guided learning hours (GLH).

TQT is an estimate of the total number of hours it would take an average learner to achieve and demonstrate the necessary level of attainment to be awarded with a qualification, both under direct supervision (forming guided learning hours) and without supervision (all other time). TQT and GLH values are advisory and assigned to a qualification as guidance.

Guidance on assessment

This qualification is assessed by portfolio of evidence which will be internally quality assured by the centre. All assessment criteria within the units must be met and assessed in line with the Skills CFA assessment strategy.

Simulation must **not** be used, except in exceptional circumstances where natural work evidence is unlikely to occur. Agreement must be gained from Highfield for the use of any simulation. If simulation is used, it should be used sparingly and should only form a small part of the evidence for the qualification.

Centres must take all reasonable steps to avoid any part of the assessment of a learner (including any internal quality assurance and invigilation) being undertaken by any person who has a personal interest in the result of the assessment.

Guidance on quality assurance

Internal quality assurance must be completed by an appropriately qualified person and that person must not have been involved in any aspect of the delivery or assessment of the course they are quality assuring.

Recognition of prior learning (RPL)

Centres may apply to use recognition of prior learning or prior achievement to reduce the amount of time spent in preparing the learner for assessment. For further information on how centres can apply to use RPL as described above, please refer to the Recognition of Prior Learning (RPL) policy in the members' area of the Highfield Qualifications website. This policy should be read in conjunction with this specification and all other relevant Highfield Qualifications documentation.

Assessor requirements

Highfield requires nominated assessors for this qualification to meet the following:

- Hold a subject area qualification relevant to the recruitment sector and/or have sufficient occupational experience within the recruitment sector relevant to the level they are assessing
- hold or be working towards a recognised assessing qualification, which could include any of the following:
    - A1 Assessor Award or Level 3 Certificate in Assessing Vocational Achievement
- maintain appropriate continued professional development for the subject area

Internal quality assurance (IQA) requirements

Highfield requires internal quality assurers for this qualification to meet the following:

- Hold a subject area qualification relevant to the recruitment sector and/or have sufficient occupational experience within the recruitment sector relevant to the level they are quality assuring
- hold or be working towards a recognised internal quality assurance qualification, which could include any of the following:

  - V1 Award or Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice
- maintain appropriate continued professional development for the subject area

Countersigning strategy

While it is a minimum requirement for centres to have the appropriately qualified workforce in place, it is understood that centres may have new personnel who are working towards those requirements. During this period, centres are required to have a robust countersigning strategy in place that supports and validates unqualified assessment/quality assurance decisions, until the point where they meet the requirements as detailed above.

Mapping to National Occupational Standards (NOS)

This qualification maps to the recruitment National Occupational Standards (NOS).

Reasonable adjustments and special considerations

Highfield has measures in place for learners who require additional support. Please refer to Highfield Qualifications' Reasonable Adjustments Policy for further information/guidance.

ID requirements

It is the responsibility of the centre to have systems in place to ensure that the person taking an assessment is indeed the person they are claiming to be. All centres are therefore required to ensure that each learner's identification is checked before they undertake the assessment. Highfield Qualifications recommends the following as proof of a learner's identity:

- a valid passport (any nationality)
- a signed UK photocard driving licence
- a valid warrant card issued by HM forces or the police
- another photographic ID card, e.g. employee ID card, student ID card, travel card etc.

If a learner is unable to produce any of the forms of photographic identification listed above, a centre may accept another form of identification containing a signature, for example, a credit card. Identification by a third-party representative, such as a line manager, human resources manager or invigilator, will also be accepted.

For more information on learner ID requirements, please refer to Highfield Qualifications' Core Manual.

Progression opportunities

Upon successful completion of this qualification, learners may wish to continue their development via the completion of any of the following signposted qualifications/training:

- Level 2 Certificate in Recruitment Resourcing
- Level 3 Certificate in Principles of Recruitment
- Level 3 NVQ Diploma in Recruitment
- Level 4 Diploma in Principles of Recruitment Practice
- Level 4 NVQ Diploma in Recruitment

Additional support/training

The National Counter Terrorism Security Office (NaCTSO) is a police unit that works alongside the Home Office to support the 'protect and prepare' areas of the government's counterterrorism strategy. You can find information, advice and guidance on recognising, acting on and reporting suspicious behaviour on the following website: www.gov.uk/government/organisations/national-counterterrorism-security-office

As an apprentice you should access the free NaCTSO Action Counters Terrorism (ACT) Awareness e-learning course. This award-winning and invaluable training tool is essential in supporting your understanding of your role in recognising and preventing terrorism and what to do in the event of a terrorist attack.

To access the course:
- follow the link: http://ct.highfieldelearning.com/org/TheHighfieldGroup
- answer the questions
- click start

Appendix 1: Qualification structure

To complete the Highfield **Level 2 NVQ Certificate in Recruitment Resourcing,** learners must achieve a minimum of **28 credits** overall:

- **all units** in the mandatory group totaling **22 credits**
- **a minimum of 6 credits** from Optional Group A

Mandatory group
Learners must achieve **all units** in this group

Unit reference	Unit title	Level	GLH	Credit
J/507/0943	Pre-selecting Candidates	2	5	2
L/507/0944	Identifying Client Recruitment Requirements	2	12	2
R/507/0945	Contributing to the Development of a Recruitment Resourcing Plan	2	8	2
Y/507/0946	Researching Candidates Through Social Media Networking	2	17	3
D/507/0947	Support the Recruitment Processes	2	11	3
H/507/0948	Using Client Relationship Management Systems for Recruitment Purposes	2	14	3
K/507/0949	Building and Maintaining Relationships with Candidates	2	5	2
R/506/1789	Develop working relationships with colleagues	2	19	3
D/507/0950	Researching Candidates for Recruitment Purposes	2	11	2

Optional Group A
Learners must achieve a **minimum of 6 credits** from Optional Group A.

Unit reference	Unit title	Level	GLH	Credit
L/506/1807	Manage diary systems	2	12	2
A/506/2130	Deliver customer service	2	27	5
A/506/2158	Resolve customer service problems	2	22	5
F/506/2159	Deliver customer service to challenging customers	2	16	3
K/506/2155	Make telephone calls to customers	2	16	3
Y/506/2135	Exceed customer expectations	2	15	3
L/506/1788	Manage personal performance and development	2	18	4
H/502/8599	Generating and qualifying sales leads	2	15	2
T/502/8588	Preparing and delivering a sales demonstration	2	20	3
D/507/1368	Selling face to face	2	25	4

Appendix 2: Qualification content

Unit 1: **Pre-selecting Candidates**
Unit number: J/507/0943
Credit: 2
GLH: 5
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Be able to pre-select candidates	1.1. Identify the criteria against which the candidates will be assessed 1.2. Assess candidates against the agreed criteria 1.3. Record the suitability and availability of those pre-selected 1.4. Record prospects who do not meet the criteria but who may be possible alternatives for other jobs 1.5. Inform those who are not pre-selected of the outcome in accordance with organisational standards and procedures 1.6. Ensure all pre-selection processes meet legal and ethical requirements
2. Be able to present pre-selected candidates	2.1. Present pre-selected candidates in the agreed format and timescale 2.2. Explain how the pre-selected candidates meet the client's staffing requirements

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 2: **Identifying Client Recruitment Requirements**
Unit number: L/507/0944
Credit: 2
GLH: 12
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Know how to identify clients' recruitment requirements	1.1. Describe the methods used to identify clients' recruitment requirements 1.2. Identify the types of experience, skills, qualifications and attributes that may be required by a client for a particular sector 1.3. Define the different contractual terms for staff that may be required by a client
2. Be able to establish role requirements	2.1. Establish the requirements of the roles using valid sources of information 2.2. Record role profiles, job descriptions, person specifications and/or vacancy details in the agreed format(s) 2.3. Explain the distinctions between job descriptions and person specifications and the information needed for each
3. Be able to provide information to confirm recruitment arrangements with clients	3.1. Provide information on the services to be offered 3.2. Provide information on the terms of business and timescales

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 3: **Contributing to the Development of a Recruitment Resourcing Plan**
Unit number: R/507/0945
Credit: 2
GLH: 8
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Be able to support the client to meet their recruitment needs	1.1. Explain the role of the client in the development of a recruitment resourcing plan 1.2. Identify the client's recruitment and selection preferences and/or processes 1.3. Explain the importance of selecting the best method(s) of recruitment and selection for a range of roles 1.4. Describe potential adverse effects associated with particular recruitment methods 1.5. Ensure all recruitment policies, materials and processes are in line with organisational policy and procedures
2. Be able to contribute to the overall development of a recruitment resourcing plan	2.1. Describe the components of a recruitment resourcing plan 2.2. Ensure the plan specifies the client's chosen recruitment and selection method(s) and is achievable within the agreed budget and timescale 2.3. Ensure the resourcing plan meets legal and ethical requirements

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 4: **Researching Candidates Through Social Media Networking**
Unit number: Y/507/0946
Credit: 3
GLH: 17
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand the benefits and risks of using social media networking to conduct a candidate search	1.1. Describe the use of social media networking to conduct a candidate research 1.2. Describe the benefits and risks of using social media networking to conduct a candidate search 1.3. Describe the risks of using social media networking when conducting a candidate search 1.4. Identify the guidelines and ethical considerations concerning the use of social media networks
2. Understand how social media networks are used	2.1. Identify social networking sites used by the organisation 2.2. Describe what is meant by an online identity 2.3. Explain the advantages and disadvantages of using social networks to research candidates
3. Be able to create a social networking profile	3.1. Use a social media application template to create a profile for a product or service 3.2. Choose secure passwords for social media accounts 3.3. Set appropriate privacy levels for social media accounts 3.4. Upload digital media content to a social media site to promote a product or service 3.5. Add contacts to a social media profile
4. Be able to create a social media group or network to attract candidates	4.1. Send messages to others using social media to attract candidates 4.2. Create a group in a social media site to share information to attract candidates 4.3. Post comments to a social network to attract candidates 4.4. Adhere to organisational policies and procedures, legal and ethical requirements

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 5: **Support the Recruitment Processes**
Unit number: D/507/0947
Credit: 3
GLH: 11
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Be able to administer tasks within the recruitment process	1.1. Take action to ensure that current and up-to-date job descriptions and person specifications are available for the roles being recruited 1.2. Confirm that terms of business have been agreed and issued 1.3. Record and monitor client and candidate information 1.4. Place advertisements in the chosen media and locations in accordance with the candidate attraction plan 1.5. Make effective use of internet and social media recruitment in accordance with the candidate attraction plan 1.6. Manage responses in accordance with the candidate attraction plan 1.7. Explain organisational procedures for the recruitment of personnel
2. Be able to administer the selection process	2.1. Make arrangements for assessment events in accordance with the resourcing plan 2.2. Invite shortlisted candidates to assessment events in accordance with organisational procedures 2.3. Arrange for any tests to be administered in accordance with the resourcing plan 2.4. Manage the administration of the assessment event in accordance with organisational procedures 2.5. Arrange for financial actions, within limit of own authority, to be carried out in accordance with organisational procedures

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
3. Be able to ensure compliance with the recruitment process	3.1. Confirm that the terms and conditions have been provided to the candidate 3.2. Carry out the agreed pre-employment checks in accordance with organisational standards and procedures 3.3. Communicate offers in accordance with organisational standards and procedures 3.4. Keep databases up to date and maintain the requirements of confidentiality

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 6: **Using Client Relationship Management Systems for Recruitment Purposes**
Unit number: H/507/0948
Credit: 3
GLH: 14
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand the principles of Client Relationship Management (CRM) for recruitment purposes	1.1. Describe how CRM systems can be used for recruitment purposes 1.2. Describe the features of a CRM system 1.3. Explain the importance of maintaining the currency, security and sufficiency of information contained within a CRM system
2. Be able to administer a candidate database	2.1. Take action to ensure the candidates listed on the candidate database meet the agreed criteria of the client 2.2. Ensure that there is sufficient information about candidates to enable matching to take place 2.3. Keep the candidate database up to date
3. Be able to store, retrieve and archive candidate information	3.1. Store candidate information in approved locations in accordance with organisational procedures 3.2. Retrieve any requested candidate information within the agreed timescale 3.3. Archive candidate information in accordance with organisational procedures within the agreed timescale 3.4. Keep archived candidate information up-to-date and indexed 3.5. Adhere to legal and ethical requirements
4. Be able to use a CRM system to match candidates to meet client requirements	4.1. Identify suitable job opportunities that meet candidates' expectations 4.2. Identify potential candidates that meet client requirements 4.3. Prepare information to enable the promotion of suitable candidates to clients and suitable clients to candidates 4.4. Follow organisational procedures to confirm that candidates have a 'right to work' in the UK 4.5. Present the information in a format that clearly shows the nature and details of the selection assessment 4.6. Ensure all activities are undertaken in line with legal and ethical practice

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 7: **Building and Maintaining Relationships with Candidates**
Unit number: K/507/0949
Credit: 2
GLH: 5
Level: 2

Learning Outcomes	**Assessment Criteria**
The learner will	***The learner can***
1. Be able to build long term relationships with candidates	1.1. Identify candidates' needs, wants and expectations 1.2. Respond to candidates' requests and need for information in line with organisational requirements 1.3. Inform candidates of the progress of any application and the need to involve other colleagues 1.4. Confirm that candidates' expectations have been met in line with any service offer 1.5. Maintain the security of candidates' personal information
2. Be able to maintain on-going and post-placement relationships	2.1. Identify new ways of helping candidates based on their feedback 2.2. Identify added value that the organisation could offer candidates to create loyalty 2.3. Bring to candidates' attention any services that may interest them 2.4. Share feedback from candidates with stakeholders 2.5. Review candidates' experiences as a means of improving the recruitment process

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 8: **Develop working relationships with colleagues**
Unit number: R/506/1789
Credit: 3
GLH: 19
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand the principles of effective team working	1.1. Outline the benefits of effective team working 1.2. Describe how to give feedback constructively 1.3. Explain conflict management techniques that may be used to resolve team conflicts 1.4. Explain the importance of giving team members the opportunity to discuss work progress and any issues arising 1.5. Explain the importance of warning colleagues of problems and changes that may affect them
2. Be able to maintain effective working relationships with colleagues	2.1. Recognise the contribution of colleagues to the achievement of team objectives 2.2. Treat colleagues with respect, fairness and courtesy 2.3. Fulfil agreements made with colleagues 2.4. Provide support and constructive feedback to colleagues
3. Be able to collaborate with colleagues to resolve problems	3.1. Take others' viewpoints into account when making decisions 3.2. Take ownership of problems within own level of authority 3.3. Take action to minimise disruption to business activities within their own level of authority 3.4. Resolve problems within their own level of authority and agreed contribution

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 9: **Researching Candidates for Recruitment Purposes**
Unit number: D/507/0950
Credit: 2
GLH: 11
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand how to search for candidate information for recruitment purposes	1.1. Explain the importance of agreeing aims, objectives and deadlines when researching for candidate information 1.2. Explain the advantages and disadvantages of Boolean searching 1.3. Describe techniques used to search for candidate information 1.4. Describe sources of candidate information for recruitment purposes 1.5. Explain the purpose of recording and storing the search results
2. Be able to search for candidate information for recruitment purposes	2.1. Agree aims, objectives and deadlines for the information search 2.2. Carry out a search of identified sources of information for candidates within agreed deadlines 2.3. Ensure that any candidates found meet the agreed client requirements 2.4. Record the search results in accordance with organisational policies

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 10: **Manage diary systems**
Unit number: L/506/1807
Credit: 2
GLH: 12
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand the management of diary systems	1.1. Explain the importance of keeping diary systems up to date 1.2. Describe the basis on which bookings and changes are prioritised 1.3. Explain any constraints relating to making bookings for people or facilities 1.4. Describe the types of problems that can occur when managing diaries
2. Be able to manage diary systems	2.1. Obtain the information needed to make diary entries 2.2. Make accurate and timely diary entries 2.3. Respond to changes in a way that balances and meets the needs of those involved 2.4. Communicate up-to-date information to everyone involved 2.5. Keep diaries up-to-date 2.6. Maintain the requirements of confidentiality

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 11: **Deliver customer service**
Unit number: A/506/2130
Credit: 5
GLH: 27
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand customer service delivery	1.1. Explain the relationship between customers' needs and expectations and customer satisfaction 1.2. Describe the features and benefits of an organisation's products and/or services 1.3. Explain the importance of treating customers as individuals 1.4. Explain the importance of balancing promises made to customers with the needs of an organisation 1.5. Explain when and to whom to escalate problems 1.6. Describe methods of measuring their own effectiveness in the delivery of customer service
2. Understand the relationship between customer service and a brand	2.1. Explain the importance of a brand to an organisation 2.2. Explain how a brand affects an organisation's customer service offer 2.3. Explain the importance of using customer service language that supports a brand promise 2.4. Identify their own role in ensuring that a brand promise is delivered
3. Be able to prepare to deal with customers	3.1. Keep up to date with an organisation's products and/or services 3.2. Prepare resources that are necessary to deal with customers before starting work

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
4. Be able to provide customer service	4.1. Maintain organisational standards of presentation and behaviour when providing customer service 4.2. Adapt their own behaviour to meet customers' needs or expectations 4.3. Respond to customers' requests in line with organisational guidelines 4.4. Inform customers of the progress of their requests 4.5. Confirm that customers' expectations have been met in line with the service offer 4.6. Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service
5. Be able to support improvements to customer service delivery	5.1. Identify ways that customer service could be improved for an organisation and individuals 5.2. Share information and ideas with colleagues and/or service partners to support the improvement of service delivery

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 12: **Resolve customer service problems**
Unit number: A/506/2158
Credit: 5
GLH: 22
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand the resolution of customer service problems	1.1. Describe an organisation's customer service and complaints procedures 1.2. Describe techniques to identify customer service problems and their causes 1.3. Describe techniques to deal with situations where customers become agitated or angry 1.4. Explain the limits of their own authority for resolving customers' problems and making promises 1.5. Explain the purpose of encouraging customers to provide feedback 1.6. Describe methods used to encourage customers to provide feedback
2. Be able to resolve customer service problems	2.1. Identify the nature and cause of customer service problems 2.2. Identify workable options for resolving problems within organisational guidelines 2.3. Use the most appropriate method of communication for dealing with customers 2.4. Agree with customers the option that best meets their needs and those of the organisation 2.5. Keep customers informed of progress 2.6. Fulfil promises made to customers during the resolution process 2.7. Share customer feedback with others to improve the resolution of customer service problems 2.8. Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems
3. Be able to manage unresolved customer service problems	3.1. Explain to customers the reasons why problems cannot be resolved 3.2. Refer customers to other sources of help if their problems cannot be resolved

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 13: **Deliver customer service to challenging customers**
Unit number: F/506/2159
Credit: 3
GLH: 16
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand the delivery of customer service to challenging customers	1.1. Describe different types of challenging customers in the customer service environment 1.2. Explain an organisation's procedures and standards of behaviour for dealing with challenging customers 1.3. Explain behaviours that make it challenging to deal with customers 1.4. Explain the difference between assertive and aggressive behaviour 1.5. Describe techniques to deal with customers' challenging behaviour 1.6. Explain their own levels of authority for agreeing actions outside the service offer 1.7. Explain why it is important that colleagues are informed when challenging customers re-open or escalate matters
2. Be able to deal with challenging customers	2.1. Identify the signs that indicate that a customer is challenging 2.2. Express understanding of customers' point of view without admitting liability 2.3. Explain to customers the limits of the service they can offer 2.4. Explain to customers the reasons for an organisation's position and policy 2.5. Agree a way forward that balances customer satisfaction and organisational needs 2.6. Obtain help from colleagues when options for action are beyond their level of authority 2.7. Adhere to organisational policies and procedures, legal and ethical requirements when dealing with challenging customers

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 14: **Make telephone calls to customers**
Unit number: K/506/2155
Credit: 3
GLH: 16
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand how to make telephone calls to customers	1.1. Explain the legislation and regulations relating to the use of customer information when planning to make calls 1.2. Explain the importance of keeping customer information up to date 1.3. Explain the reasons for organisational guidance on dealing with telephone calls 1.4. Explain the reasons for organisational identity checking processes 1.5. Explain how body language and facial expressions can be detected over the telephone 1.6. Describe different questioning techniques when dealing with customers 1.7. Explain organisational guidelines for what can and cannot be said or promised 1.8. Explain how to handle abusive calls from customers
2. Be able to plan telephone calls to customers	2.1. Identify the objective(s) of calls 2.2. Prepare the information needed to make calls 2.3. Plan the structure of calls 2.4. Identify customers' likely responses and how they can be dealt with
3. Be able to make telephone calls to customers	3.1. Use telecommunications equipment in accordance with organisational standards 3.2. Confirm the identity of customers in line with organisational guidelines 3.3. Make the customer aware of the purpose of the call as early as possible 3.4. Speak clearly, concisely and politely, using speech and tone to create rapport 3.5. Adapt their own communication style to meet customers' needs 3.6. Listen actively to what customers are saying to collect as much information as possible 3.7. Give clear and concise information that meets customers' needs 3.8. Record information in line with organisational guidelines 3.9. Complete agreed follow up actions after closing the telephone call

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy.

Unit 15: **Exceed customer expectations**
Unit number: Y/506/2135
Credit: 3
GLH: 15
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand how to exceed customer expectations	1.1. Explain how customers form expectations of the service they will receive 1.2. Explain legislation, organisational policies and procedures that can limit or vary the service offer 1.3. Explain the types of actions that customers are likely to perceive as adding value 1.4. Explain how to recognise when actions taken to offer added value could be built into the service offer
2. Be able to exceed customer expectations	2.1. Identify differences between customers' expectations and needs and the service offer 2.2. Explain the service offer clearly and concisely to customers 2.3. Identify options that offer added value without affecting other customers adversely 2.4. Make offers to customers within their own authority levels 2.5. Take action to ensure that customers are aware that offers made to them have added value and exceed the service offer 2.6. Record agreements made and actions taken

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 16: **Manage personal performance and development**
Unit number: L/506/1788
Credit: 4
GLH: 18
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Be able to manage personal performance	1.1. Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2. Agree criteria for measuring progress and achievement with line manager 1.3. Complete tasks to agreed timescales and quality standards 1.4. Report problems beyond their own level of competence and authority to the appropriate person 1.5. Take action needed to resolve any problems with personal performance
2. Be able to manage their own time and workload	2.1. Plan and manage workloads and priorities using time management tools and techniques 2.2. Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives 2.3. Explain the benefits of achieving an acceptable "work-life balance"
3. Be able to identify their own development needs	3.1. Identify organisational policies relating to personal development 3.2. Explain the need to maintain a positive attitude to feedback on performance 3.3. Explain the potential business benefits of personal development 3.4. Identify their own preferred learning style(s) 3.5. Identify their own development needs from analyses of the role, personal and team objectives 3.6. Use feedback from others to identify their own development needs 3.7. Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
4. Be able to fulfil a personal development plan	4.1. Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms 4.2. Make use of formal development opportunities that are consistent with business needs 4.3. Use informal learning opportunities that contribute to the achievement of personal development objectives 4.4. Review progress against agreed objectives and amend plans accordingly 4.5. Share lessons learned with others using agreed communication methods

Additional assessment guidance/requirements
All assessment criteria must be met and assessed in line with the Skills CFA assessment strategy

Unit 17: **Generating and qualifying sales leads**
Unit number: H/502/8599
Credit: 2
GLH: 15
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand the practices, legislation, regulation and codes of practice that relate to generating and qualifying sales leads	1.1. Describe the organisational practices for acquiring contact lists and databases 1.2. Describe the practices relating to the sharing of customer information across the organisation 1.3. Identify the legislation and regulation relating to generating and qualifying sales leads 1.4. Explain the ethical codes of conduct relating to the generating and qualifying of leads
2. Understand the process of generating and qualifying sales leads	2.1. Explain how customers are segmented 2.2. Explain why and when different methods of contacting a prospect should be used 2.3. Explain how to identify and access key decision makers 2.4. Explain the importance of establishing buying needs and the contact's attitude to buying 2.5. Explain how the information provided by customers is assessed for potential up selling and cross selling 2.6. Explain how to identify customers who have high order value potential or up selling and cross selling opportunities
3. Be able to prospect for customers	3.1. Identify the target market customers and prospects according to the agreed criteria 3.2. Source and gather market and prospect information according to the agreed criteria 3.3. Qualify the sales contact according to the agreed criteria 3.4. Record details of sales contact in accordance with organisational procedures

Additional assessment guidance/requirements
All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.

Unit 18: Preparing and delivering a sales demonstration

Unit number: T/502/8588
Credit: 3
GLH: 20
Level: 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand how to prepare and deliver a sales demonstration	1.1. Explain how the demonstration will contribute to the achievement of business goals and objectives 1.2. Describe the features and benefits of the products and services being demonstrated 1.3. Explain how to provide demonstrations of products and services in a manner and style which is suitable to different audiences 1.4. Explain the importance of rehearsing demonstrations 1.5. Describe equipment and accommodation requirements of the demonstration
2. Be able to prepare for a sales demonstration	2.1. Identify the sales targets for own area of responsibility 2.2. Identify customer needs and wants in relation to the products and/or services being demonstrated 2.3. Agree the objectives, length, content and method of the demonstration and who will be present 2.4. Identify resources for the demonstration and plan the demonstration in a structured way 2.5. Anticipate problems, constraints or objections that could be raised in response to the demonstration and prepare possible responses 2.6. Prepare supporting materials that are consistent with the demonstration
3. Be able to deliver a sales demonstration	3.1. Promote the features and benefits of the products and/or services 3.2. Deliver the demonstration in a style and manner that achieves the objectives and engages the audience 3.3. Provide the customer/audience with opportunities to ask questions and raise objections 3.4. Respond to questions and objections in a manner that is likely to further sales 3.5. Gain commitment to progress or close the sale

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
4. Be able to evaluate the sales demonstration	4.1. Evaluate the sales demonstration against agreed objectives 4.2. Provide feedback to colleagues to improve the planning of future demonstrations and/or to enhance products and/or services

Additional assessment guidance/requirements
All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.

Unit 19: **Selling face to face**
Unit number: D/507/1368
Credit: 4
GLH: 25
Level: 2

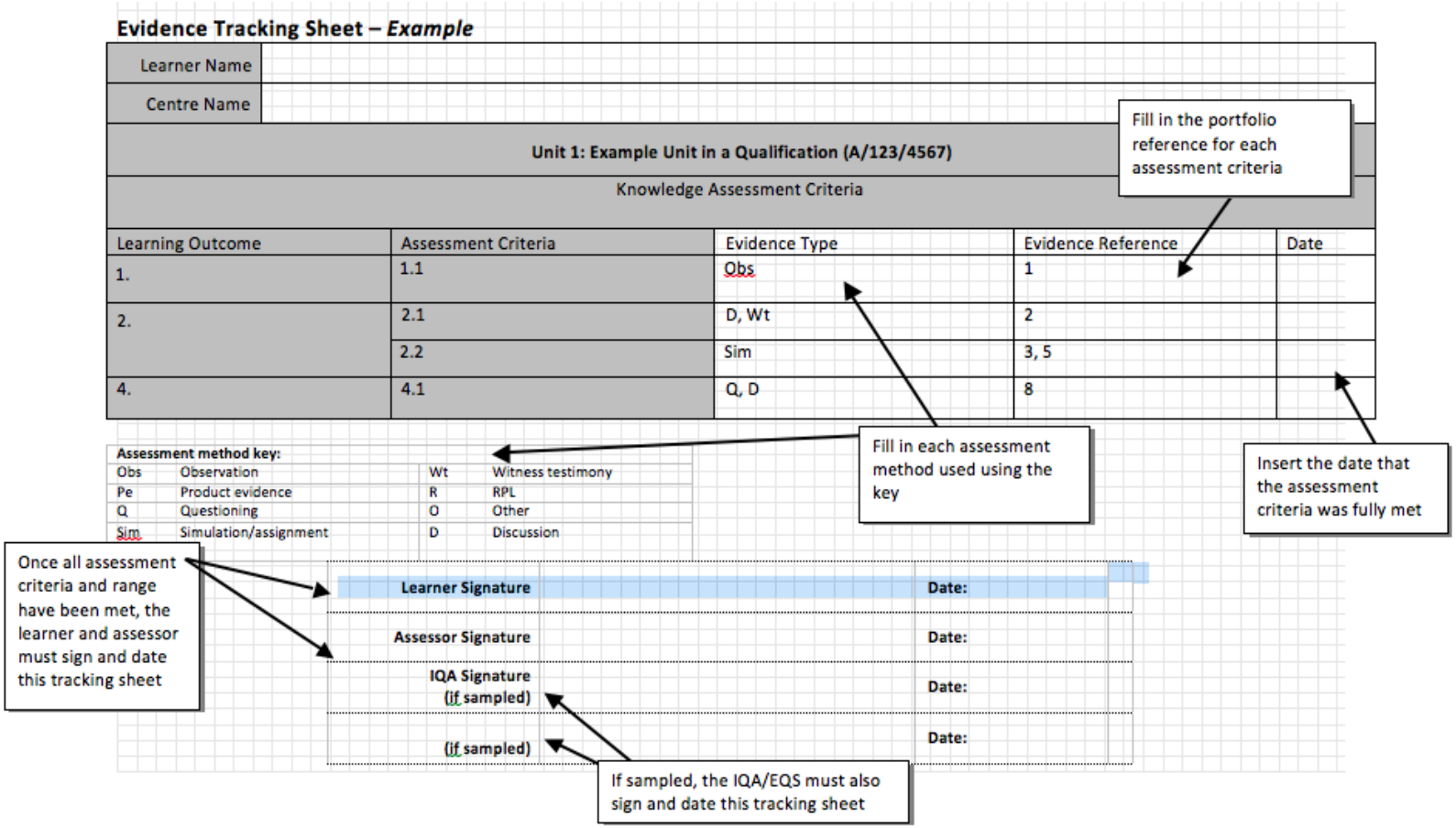
Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand how to sell to customers face to face	1.1. Explain the differences between proactive and reactive selling 1.2. Explain how techniques such as cross-selling, up-selling and the sale of add-ons can be applied when selling in face to face situations 1.3. Describe the types of listening and questioning techniques used for selling in face to face situations 1.4. Explain how to interpret non-verbal behaviour in face to face sales situations 1.5. State the differences between benefits and features 1.6. Describe the different methods used to sell benefits 1.7. Explain how to involve the prospect in reaching solutions to sales problems
2. Be able to prepare for the sale	2.1. Develop a structured sales plan for the meeting that makes effective use of the time available 2.2. Select resources to be used during contact with the customer that are consistent with the plan
3. Be able to conduct a face to face sales meeting with the customer	3.1. Follow organisational standards of personal presentation when meeting customers 3.2. Work within social and cultural constraints relating to the sector/industry and/or customer 3.3. Behave in a way that is likely to develop a rapport with the customer 3.4. Identify customer requirements through the use of questioning and active listening 3.5. Confirm customer requirements by summarising their buying needs and interests 3.6. Identify products and/or services which match the customer's needs and confirm with the customer that they are suitable 3.7. Communicate unique selling points to the customer

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	3.8. Provide the customer with opportunities to discuss and assess features and benefits of products and/or services 3.9. Interpret buying signals and act on them to progress the sale 3.10. Provide the customer with materials to support the promotion of products and/or services
4. Be able to deal with sales objections during face to face sales situations	4.1. Identify sales objections prior to dealing with the customer 4.2. Clarify objections and identify potential sales opportunities from them 4.3. Evaluate potential trade-offs that will be mutually beneficial to the customer and to the organisation 4.4. Record any area in which the product and/or service does not meet the customer's requirements 4.5. Resolve customer queries about the product and/or service 4.6. Reassure the customer and confirm their objections have been overcome
5. Be able to close the sale	5.1. Perform a trial close to establish whether or not further objections exist 5.2. Gain a commitment from the customer to close the sale 5.3. Complete the formalities of the sale following organisational procedures

Additional assessment guidance/requirements
All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.

Appendix 3: Sample assessment material

Highfield provides centres with a learner assessment pack that contains tracking documents that can be used to support learners in gathering evidence within their portfolio. This is available to download from the Highfield website.



Evidence Tracking Sheet – *Example*

Learner Name	
Centre Name	

Unit 1: Example Unit in a Qualification (A/123/4567)

Knowledge Assessment Criteria

Learning Outcome	Assessment Criteria	Evidence Type	Evidence Reference	Date
1.	1.1	Obs	1	
2.	2.1	D, Wt	2	
	2.2	Sim	3, 5	
4.	4.1	Q, D	8	

Fill in the portfolio reference for each assessment criteria

Fill in each assessment method used using the key

Insert the date that the assessment criteria was fully met

Assessment method key:			
Obs	Observation	Wt	Witness testimony
Pe	Product evidence	R	RPL
Q	Questioning	O	Other
Sim	Simulation/assignment	D	Discussion

Once all assessment criteria and range have been met, the learner and assessor must sign and date this tracking sheet

Learner Signature		**Date:**
Assessor Signature		**Date:**
IQA Signature (if sampled)		**Date:**
(if sampled)		**Date:**

If sampled, the IQA/EQS must also sign and date this tracking sheet