Qualification Specification

Highfield Level 3 NVQ Diploma in Recruitment (RQF)

Qualification Number: 601/7922/3

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Highfield Level 3 NVQ Diploma in Recruitment (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 3 NVQ Diploma in Recruitment (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:	601/7922/3
Learning aim reference:	60179223
Credit value:	41
Assessment method:	Portfolio of Evidence
Guided learning hours (GLH):	188
Total qualification time (TQT):	410

Qualification overview and objective

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

This qualification is designed for those learners wishing to gain a nationally recognised qualification in recruitment. 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. Advanced apprentices will work in job roles such as trainee recruitment consultants, junior recruitment consultants, resourcers or account representatives.

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 2 literacy and numeracy.

Geographical coverage

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

Guidance on delivery

The total qualification time for this qualification is 410 hours and of this 188 are recommended as guided learning hours.

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.

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 3 Certificate in Principles of 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 3 NVQ Diploma in Recruitment (RQF),** learners must achieve a minimum of **41 credits** overall:

- **all units** in the mandatory group totaling **28 credits**
- **a minimum of 13 credits** from Optional Group A

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

Unit reference	Unit title	Level	GLH	Credit
T/504/6962	Identify client recruitment requirements	3	10	3
F/504/6964	Pre-select candidates	3	10	3
L/504/6966	Assess candidates	3	20	3
R/504/6967	Match and present candidates to employers	3	30	4
K/504/6974	Attract potential candidates	3	20	3
T/504/6976	Brief and support candidates	3	15	3
A/504/6977	Carry out candidate debriefing	3	20	4
F/504/6978	Administer recruitment processes	2	20	2
H/600/9660	Develop working relationships with colleagues	2	15	3

Optional Group A
A minimum of 13 credits from Optional Group A.

Unit reference	Unit title	Level	GLH	Credit
M/504/6961	Advise clients on operational recruitment planning	3	15	4
A/504/6963	Develop resourcing plan for recruitment services	3	15	4
D/504/6969	Sustain customer-focused relationships with clients	3	30	6
J/504/6979	Co-ordinate flexible workers	3	40	6
H/502/9929	Conduct market research	3	10	6
F/502/8612	Negotiating, handling objections and closing sales	3	22	4
K/502/8622	Buyer behaviour in sales situations	3	27	3
Y/502/9927	Analyse competitor activity	3	3	3
A/502/8656	Developing sales proposals	4	30	5
L/502/8631	Preparing and delivering a sales presentation	3	28	4
R/600/9587	Develop, maintain and review personal networks	4	25	4

Appendix 2: Qualification content

Unit 1: **Identify client recruitment requirements**
Unit number: T/504/6962
Credit: 3
GLH: 10
Level: 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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

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 Recruitment Assessment Strategy.

Unit 2: **Pre-select candidates**
Unit number: F/504/6964
Credit: 3
GLH: 10
Level: 3

Learning Outcomes	**Assessment Criteria**
The learner will	***The learner 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

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 Recruitment Assessment Strategy.

Unit 3: **Assess candidates**
Unit number: L/504/6966
Credit: 3
GLH: 20
Level: 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Plan candidate assessments	1.1. Confirm the objectives of the assessment process(es) 1.2. Assemble the resources needed for the assessment process 1.3. Invite candidates to carry out the assessment process(es) in accordance with organisational standards and procedures
2. Carry out 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 interviewing techniques 2.2. Make assessments that are objective and evidence-based 2.3. Inform candidates of the next step(s) and/or results in the process in accordance with organisational standards and procedures 2.4. Record the outcomes of the assessment 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

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 Recruitment Assessment Strategy.

Unit 4: **Match and present candidates to employers**
Unit number: R/504/6967
Credit: 4
GLH: 30
Level: 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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

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 Recruitment Assessment Strategy.

Unit 5: Attract potential candidates
Unit number: K/504/6974
Credit: 3
GLH: 20
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Plan candidate attraction activities	1.1. Select networks and marketing methods and media that are likely to reach the desired candidate group(s) 1.2. Specify the timescale 1.3. Ensure all recruitment activities, materials and processes meet legal and ethical requirements
2. Implement candidate attraction activities	2.1. Deliver the plan within the agreed timescale 2.2. Manage problems in accordance with organisational procedures 2.3. Keep stakeholders up to date with progress, developments and issues 2.4. Record and report on the outcomes of the implementation in accordance with the plan and organisational procedures 2.5. Create job advertisements that capture all the required information using relevant and accurate information sources 2.6. Explain the principles of effective job advertisement design (Attention, Desire, Interest, Action (AIDA)) 2.7. Ensure all recruitment advertising, materials and processes meet legal and ethical requirements
3. Build relationships with candidates	3.1. Qualify candidates in accordance with organisational standards and procedures 3.2. Provide information and advice that would enhance candidates' employability 3.3. Use opportunities to promote the candidate for suitable positions 3.4. Apply customer service techniques in building productive relationships with potential candidates 3.5. Record all contact with and information about candidates that is likely to add to understanding about candidates and clients

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 Recruitment Assessment Strategy.

Unit 6: **Brief and support candidates**
Unit number: T/504/6976
Credit: 3
GLH: 15
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Identify candidates' needs	1.1. Identify the nature of candidates' needs and expectations 1.2. Agree priorities, availability, flexibilities and action plans 1.3. Record agreements and information in accordance with organisational procedures
2. Brief candidates on employer requirements	2.1. Brief candidates on employers' requirements and preferences 2.2. Provide constructive and sensitive feedback to candidates on their job-search performance 2.3. Ensure all recruitment policies, materials and processes meet legal and ethical requirements
3. Support candidates	3.1. Take steps to find suitable job opportunities for candidates 3.2. Promote candidates to employers for suitable positions 3.3. Suggest ways of improving candidates' employability 3.4. Negotiate on behalf of candidates to optimum effect (e.g. terms, dates, counter offers)

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 Recruitment Assessment Strategy.

Unit 7: **Carry out candidate debriefing**
Unit number: A/504/6977
Credit: 4
GLH: 20
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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 requirements

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 Recruitment Assessment Strategy.

Unit 8: Administer recruitment processes

Unit number: F/504/6978
Credit: 2
GLH: 20
Level 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Administer the recruitment process	1.1. Ensure that current and accurate job descriptions/role profiles and person specifications are available for the roles being recruited 1.2. Confirm the accuracy and completeness of the terms, conditions, benefits, application and response methods for the roles being recruited 1.3. Place advertisements in the chosen media/locations in accordance with the candidate attraction plan 1.4. Make effective use of internet recruitment in accordance with the candidate attraction plan 1.5. Manage responses in accordance with the candidate attraction plan 1.6. Explain organisational procedures for the recruitment of personnel
2. 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. Carry out financial actions in accordance with organisational procedures
3. Administer the appointment process	3.1. Confirm the terms and conditions on which the candidate will be employed 3.2. Carry out the agreed pre-employment checks 3.3. Communicate offers in accordance with organisational standards and procedures

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
	3.4. Keep databases up to date and maintain the requirements of confidentiality

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 Recruitment Assessment Strategy.

Unit 9: **Develop working relationships with colleagues**
Unit number: H/600/9660
Credit: 3
GLH: 15
Level 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand the benefits of working with colleagues.	1.1. Describe the benefits of productive working relationships.
2. Be able to establish working relationships with colleagues.	2.1. Identify colleagues within own and other organisations. 2.2. Agree the roles and responsibilities for colleagues.
3. Be able to act in a professional and respectful manner when working with colleagues.	3.1. Explain how to display behaviour that shows professionalism.
4. Be able to communicate with colleagues.	4.1. Identify, information to others clearly and concisely. 4.2. Explain how to receive and clarify own understanding of information.
5. Be able to identify potential work-related difficulties and explore solutions.	5.1. Identify potential work-related difficulties and conflicts of interest. 5.2. Explain how to resolve identified potential difficulties.

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 Recruitment Assessment Strategy.

Unit 10: Advise clients on operational recruitment planning

Unit number: M/504/6961
Credit: 4
GLH: 15
Level 2

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Understand human resource planning	1.1. Explain how public and private sector organisations carry out human resource planning 1.2. Identify the factors to be taken into account in human resource planning 1.3. Explain the importance of the role of recruitment in human resource planning 1.4. Assess the recruiter's role in human resource planning
2. Define clients' operational recruitment needs	2.1. Explain employment-related trends and patterns in the client's industry 2.2. Determine the client's current operational needs 2.3. Advise on the availability of suitable personnel in the labour market 2.4. Calculate the cost of hiring time, fees/staff costs to the client 2.5. 5 Present a recruitment solution to the client, showing costs, benefits and performance measures 2.6. Agree mutually acceptable terms and conditions of business with the client 2.7. Ensure all recruitment policies, materials and processes meet legal and ethical requirements
3. Understand the basis for choosing recruitment methods and media	3.1. Explain the features, requirements, advantages and disadvantages of a range of recruitment methods (word of mouth, newspaper adverts, TV, radio, e-recruitment, agencies/consultancies, job clubs, training schemes, networking etc) 3.2. Explain why some recruitment methods and media are better suited to some roles than others
4. Analyse the effectiveness of the recruitment solutions	4.1. Analyse valid information using valid methods of evaluation

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
	4.2. Identify the success of the solutions in meeting the client's objectives

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 Recruitment Assessment Strategy.

Unit 11: **Develop resourcing plan for recruitment services**
Unit number: A/504/6963
Credit: 4
GLH: 15
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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

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 Recruitment Assessment Strategy.

Unit 12: **Sustain customer-focused relationships with clients**
Unit number: D/504/6969
Credit: 6
GLH: 30
Level 3

Learning Outcomes	**Assessment Criteria**
The learner will	***The learner can***
1. Understand networking tools to create relationships with clients in recruitment	1.1. Explain the purpose and benefits of recruitment networking 1.2. Explain how different social media can be used for recruitment networking and marketing purposes 1.3. Explain the importance and requirements of creating a personal "brand"
2. Build and sustain relationships with clients in recruitment	2.1. Plan an approach that is appropriate to different kinds of recruitment relationship (existing, lapsed, potential) and their position in the buying cycle 2.2. Identify the client's needs, preferences, priorities, policies and problems as they relate to recruitment 2.3. Apply customer service techniques in building productive relationships with recruitment clients 2.4. Identify and manage recruitment client expectations 2.5. Explain the components and functions of account management in recruitment 2.6. Use opportunities to maintain productive contact with recruitment clients 2.7. Explain methods of assessing the effectiveness of the relationship (e.g. client satisfaction surveys, Service Level Agreements, business reviews, performance and efficiency indicators) 2.8. Ensure all activities and records meet legal and ethical requirements

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 Recruitment Assessment Strategy.

Unit 13: **Co-ordinate flexible workers**
Unit number: J/504/6979
Credit: 6
GLH: 40
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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

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 Recruitment Assessment Strategy.

Unit 14: **Conduct market research**
Unit number: H/502/9929
Credit: 6
GLH: 10
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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

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 15: **Negotiating, handling objections and closing sales**
Unit number: F/502/8612
Credit: 4
GLH: 22
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
	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

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 16: **Buyer behaviour in sales situations**
Unit number: K/502/8622
Credit: 3
GLH: 27
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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

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 17: **Analyse competitor activity**
Unit number: Y/502/9927
Credit: 3
GLH: 3
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner can***
1. Be able to identify competitor activity	1.1. Identify organisations competing for the same customers 1.2. Identify potentially threatening competitor activity 1.3. Identify competitors' objectives 1.4. Identify valid sources of information on competitors and their activity 1.5. Explain the advantages and disadvantages of sources of information on competitors and their activity
2. Be able to determine the nature of the threat posed by competitor activity	2.1. Assess the strengths and weaknesses of competitor activity against agreed criteria 2.2. Assess the strengths and weaknesses of competitors' products and/or services against agreed criteria 2.3. Determine the nature and extent of the possible threat posed by competitor activity and 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 18: Developing sales proposals

Unit number: A/502/8656
Credit: 5
GLH: 30
Level 4

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
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

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: Preparing and delivering a sales presentation

Unit number: L/502/8631
Credit: 4
GLH: 28
Level 3

Learning Outcomes	Assessment Criteria
The learner will	***The learner 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

Learning Outcomes	Assessment Criteria
The learner will	*The learner can*
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

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.

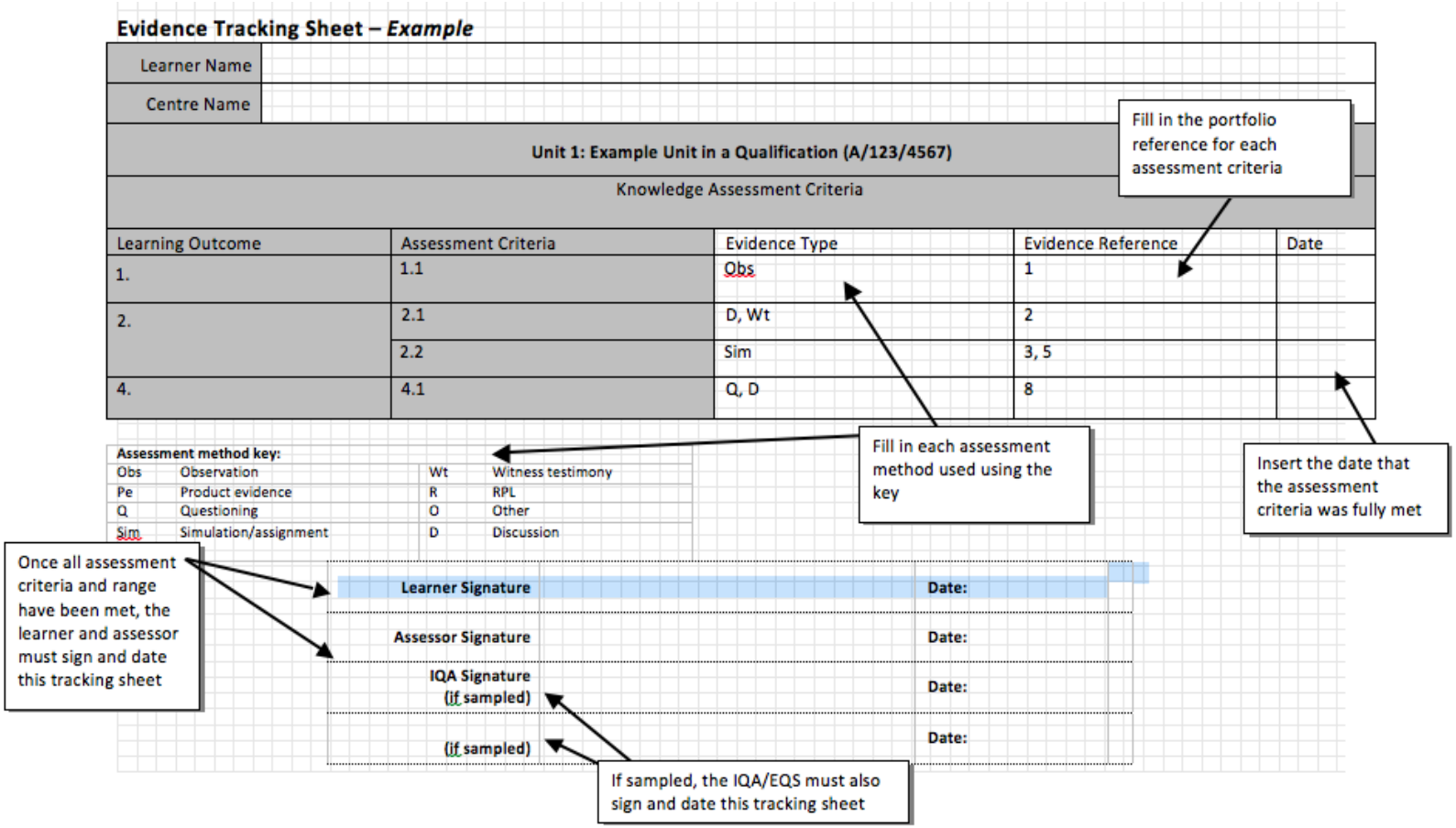
Unit 20: **Develop, maintain and review personal networks**
Unit number: R/600/9587
Credit: 4
GLH: 25
Level 4

Learning Outcomes	**Assessment Criteria**
The learner will	***The learner 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.

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