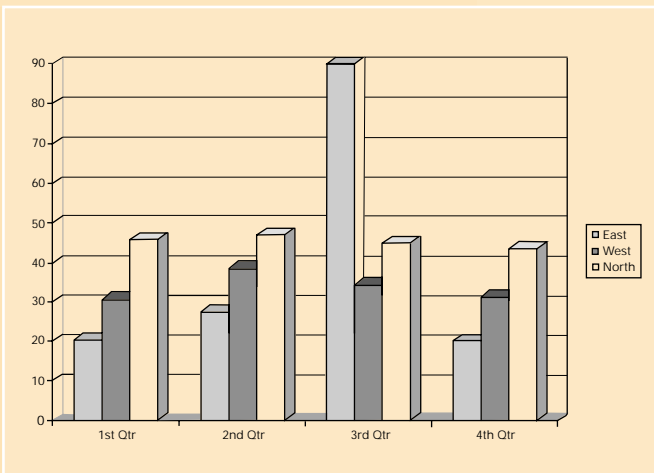


SALES NVQs LEVELS 2, 3 AND 4



Telesales NVQ Level 2

Sales NVQ Level 2

Telesales NVQ Level 3

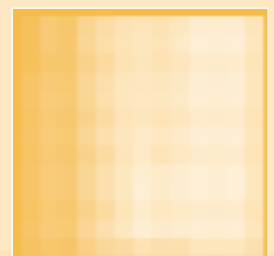
Sales NVQ Level 3

Key Account Management NVQ Level 4

Sales Management NVQ Level 4

Information Brief

NVQ



N721 0001

SALES

OCR is a new awarding body, established by the University of Cambridge Local Examinations Syndicate and RSA Examinations Board. OCR provides a full range of vocational and academic qualifications.

More people are employed in sales and telesales than any other profession. It is generally accepted that business growth depends on organisations investing in their salesforce in order to compete and succeed. OCR offers the full range of Sales NVQs to help employers and employees demonstrate total quality and achieve success.

The Benefits of Sales NVQs:

Employees will benefit from:

- A clear understanding of responsibilities
- The development of new skills
- The recognition of existing skills
- Opportunities to improve sales service to customers
- Improvements to working practice

Employers will benefit from:

- Improved staff performance
- Increased skill levels
- More highly motivated staff
- Improvements in the quality of service to customers
- New ideas for future development

These Sales NVQ standards were developed by The Sales Qualifications Board (SQB) who are now part of the Management Enterprise National Training Organisation (METO).

Centres organise the assessment of candidates. Organisations wishing to offer the Sales NVQs can either apply to OCR to become a registered centre (if they can provide appropriate Internal Verifiers and Assessors) or work with an existing centre.

National Vocational Qualifications recognise competent performance in a particular job and the necessary knowledge and understanding to perform that role effectively. There are several key people involved in the assessment process.

Candidates plan a programme of development and assessment with their Assessor and compile a portfolio of evidence to demonstrate their competence through performance, documentation, reporting and questioning.

Assessors are competent and have prior experience (minimum two years) gained within the last ten years in a relevant professional sales position. They must gain within 12 months of appointment the TDLB units D32 and/or D33. Assessors are likely to be either work based or contracted from a nearby assessment centre.

Internal Verifiers are appointed by the Centre. They provide advice and support to Assessors, administer the documentation and monitor the quality of assessment. They will hold or be working towards TDLB unit D34 and preferably D32 and/or D33. They should also have prior sales experience.

External Verifiers are appointed by OCR to evaluate Centres, to monitor quality and to provide ongoing support. They will have experience both of Sales and of NVQs.

THE QUALIFICATIONS

Qualification Structure:

TELESALES NVQ LEVEL 2

To achieve a full award, candidates must complete six units, comprising of four mandatory units and two optional units.

Mandatory Units

- 1 (A9) Continuously improve own sales performance (SQB)
- 2 (B31) Contribute to effective working (SQB)
- 3 (C51) Sell products and services over the telephone to customers (SQB)
- 4 (C76) Contribute to maintaining effective customer service (SQB)

Optional Units

- 5 (A10) Plan and organise a personal work schedule (SQB)
- 6 (B35) Input and access data in the organisation's information systems (SQB)
- 7 (C41) Identify sales leads for follow-up calls (SQB)
- 8 (C42) Follow up and action tele-sales leads (SQB)
- 9 (C60) Process customer's orders for goods (DOSC Unit 24)
- 10 (C72) Support customers in using products and services (SQB)
- 11 (C74) Meet customers' after sales servicing needs (SQB)

Qualification Structure:

SALES NVO LEVEL 2

To achieve a full award, candidates must complete seven units, comprising of five mandatory units and two optional units.

Mandatory Units

- 1 (A9) Continuously improve own sales performance (SQB)
- 2 (B31) Contribute to effective working (SQB)
- 3 (C49) Develop and maintain positive working relationships with customers (CSLB Unit 1 L2)
- 4 (C52) Sell products and services to customers in face-to-face settings (SQB)
- 5 (C76) Contribute to maintaining effective customer service (SQB)

Optional Units

- 6 (A10) Plan and organise a personal work schedule (SQB)
- 7 (B35) Input and access data in the organisation's information systems (SQB)
- 8 (C41) Identify sales leads for follow-up calls (SQB)
- 9 (C43) Follow up and action sales leads (SQB)
- 10 (C60) Process customers' orders for goods (DOSC Unit 24)
- 11 (C61) Process payments for purchases (DOSC Unit 29)
- 12 (C66) Appraise goods for part exchange (SQB)
- 13 (C68) Monitor the delivery of goods to the customer (SQB)
- 14 (C73) Help customers use products and services (SQB)
- 15 (C74) Meet customers' after sales servicing needs (SQB)

Qualification Structure:

TELESALES NVO LEVEL 3

To achieve a full award, candidates must complete ten units, comprising of seven mandatory units and three optional units.

Mandatory Units

- 1 (A5) Forecast, monitor and evaluate own performance in achieving telesales targets (SQB)
- 2 (A11) Design, implement and evaluate sales plans (SQB)
- 3 (B21) Manage yourself (MCI)
- 4 (B28) Create and maintain effective sales relationships (SQB)
- 5 (C44) Generate and follow up telesales leads (SQB)
- 6 (C51) Sell products and services over the telephone to customers (SQB)
- 7 (C77) Solve problems on behalf of customers (SQB)

Optional Units

- 8 (A1) Contribute to the marketing of products and services (SQB)
- 9 (C38) Develop, maintain and evaluate (a) customer database(s) for the organisation's products and services (SQB)
- 10 (C55) Prepare and present proposals and quotations to customers for the supply of products and services (SQB)
- 11 (C62) Control cash and credit transactions (DOSC Unit 30)
- 12 (C64) Assist customers to secure finance for purchases (SQB)

- 13 (C69) Monitor and finalise the handover and implementation of products and services (SQB)
- 14 (C75) Support the ongoing servicing, maintenance and repair of products and services (SQB)
- 15 (C78) Initiate and evaluate change to improve service to customers (CSLB Unit 5 L3)
- 16 (B18) Contribute to the development of teams and individuals (MCI)
- 17 (B19) Facilitate individual learning through coaching (TDLB)
- 18 (B23) Support the efficient use of resources (MCI)
- 19 (B25) Lead the work of teams and individuals to achieve their objectives (MCI)
- 20 (B29) Create effective working relationships (MCI)
- 21 (B32) Maintain activities to meet requirements (MCI)
- 22 (B36) Manage information for action (MCI)

Qualification Structure:

SALES NVO LEVEL 3

To achieve a full award, candidates must complete ten units, comprising of seven mandatory units and three optional units.

Mandatory Units

- 1 (A6) Forecast, monitor and evaluate own performance in achieving sales targets (SQB)
- 2 (A11) Design, implement and evaluate sales plans (SQB)
- 3 (B21) Manage yourself (MCI)
- 4 (B28) Create and maintain effective sales relationships (SQB)

- 5 (C45) Generate and follow up sales leads (SQB)
- 6 (C52) Sell products and services to customers in face-to-face settings (SQB)
- 7 (C77) Solve problems on behalf of customers (SQB)

Optional Units

- 8 (A1) Contribute to the marketing of products and services (SQB)
- 9 (C38) Develop and maintain (a) customer database(s) for the organisation's products and services (SQB)
- 10 (C48) Provide demonstrations of products and services to customers (SQB)
- 11 (C53) Negotiate sales (SQB)
- 12 (C55) Prepare and present proposals and quotations to customers for the supply of products and services (SQB)
- 13 (C58) Make sales presentations to existing and potential customers (SQB)
- 14 (C64) Assist customers to secure finance for purchases (SQB)
- 15 (C67) Value goods for part exchange (SQB)
- 16 (C69) Monitor and finalise the handover and implementation of products and services (SQB)
- 17 (C75) Support the ongoing servicing, maintenance and repair of products and services (SQB)
- 18 (C78) Initiate and evaluate change to improve service to customers (CSLB Unit 5 L3)
- 19 (B18) Contribute to the development of teams and individuals (MCI)

- 20 (B19) Facilitate individual learning through coaching (TDLB)
- 21 (B23) Support the efficient use of resources (MCI)
- 22 (B25) Lead the work of teams and individuals to achieve their objectives (MCI)
- 23 (B29) Create effective working relationships (MCI)
- 24 (B32) Maintain activities to meet requirements (MCI)
- 25 (B36) Manage information for action (MCI)

Qualification Structure:

KEY ACCOUNT MANAGEMENT NVQ LEVEL 4

To achieve a full award, candidates must complete eleven units, comprising of eight mandatory units and three optional units.

Mandatory Units

- 1 (A2) Contribute to the development and implementation of organisational marketing and sales policy and strategy (SQB)
- 2 (A7) Forecast, monitor and evaluate sales performance of account teams and self (SQB)
- 3 (A12) Design and implement a Key Account Plan (SQB)
- 4 (B22) Develop your own resources (MCI)
- 5 (C46) Determine a strategy for the promotion of products and services to Key Accounts (SQB)
- 6 (C50) Establish, maintain and enhance productive working relationships with customers (SQB)

- 7 (C54) Identify and optimise opportunities for the sale of products and services to customers (SQB)
- 8 (C79) Develop and improve service systems (SQB)

Optional Units

- 9 (C39) Determine the preferred customer base for the organisation's products and services (SQB)
- 10 (C40) Develop, audit and renew networks of current and prospective customers (SQB)
- 11 (C47) Co-ordinate the introduction of new products and services (SQB)
- 12 (C55) Prepare and present proposals and quotations to customers for the supply of products and services (SQB)
- 13 (C57) Prepare and submit tenders for the supply of products and services (SQB)
- 14 (C59) Lead major sales presentations and promotions (SQB)
- 15 (C64) Assist customers to secure finance for purchases (SQB)
- 16 (C70) Control and maintain trade (ITAS)
- 17 (C71) Plan, organise and monitor a distribution system for international trade and services (ITAS)
- 18 (B20) Develop teams and individuals to enhance performance (MCI)
- 19 (B24) Manage the use of financial resources (MCI)
- 20 (B27) Facilitate meetings (MCI)
- 21 (B30) Develop productive working relationships (MCI)
- 22 (B33) Manage activities to meet requirements (MCI)

23 (B37) Provide information to support decision making (MCI)

Qualification Structure:

SALES MANAGEMENT NVQ LEVEL 4

To achieve a full award, candidates must complete eleven units, comprising of four mandatory units and seven optional units. Please note: At least four optional units must be selected from the 'Management' Group.

Mandatory Units

- 1 (A3) Contribute to sales strategy (SQB)
- 2 (A8) Forecast sales for products and services (SQB)
- 3 (A13) Develop, implement and evaluate sales plans (SQB)
- 4 (B22) Develop your own resources (MCI)

Optional Units

Sales and Customer Service Group

- 5 (C39) Determine the preferred customer base for the organisation's products and services (SQB)
- 6 (C40) Develop, audit and renew networks of current and prospective customers (SQB)
- 7 (C47) Co-ordinate the introduction of new products and services (SQB)
- 8 (C54) Identify and optimise opportunities for the sale of products and services to customers (SQB)
- 9 (C55) Prepare and present proposals and quotations to customers for the supply of products and services (SQB)

10 (C57) Prepare and submit tenders for the supply of products and services (SQB)

11 (C59) Lead major sales presentations and promotions (SQB)

12 (C64) Assist customers to secure finance for purchases (SQB)

13 (C79) Develop and improve service systems (SQB)

Management Group

14 (A4) Monitor compliance with quality systems (MCI)

15 (A14) Contribute to project planning and preparation (MCI)

16 (A15) Co-ordinate the running of projects (MCI)

17 (A16) Contribute to project closure (MCI)

18 (B17) Select personnel for activities (MCI)

19 (B20) Develop teams and individuals to enhance performance (MCI)

20 (B24) Manage the use of financial resources (MCI)

21 (B26) Manage the performance of teams and individuals (MCI)

22 (B27) Facilitate meetings (MCI)

23 (B30) Develop productive working relationships (MCI)

24 (B33) Manage activities to meet requirements (MCI)

25 (B34) Contribute to improvements at work (MCI)

26 (B37) Provide information to support decision making (MCI)

What do I do next?

Ask OCR Information on 024 76 470033 for further information or e-mail: cib@ocr.org.uk

The following three scheme books containing the standards and guidance on implementation are available to purchase:

Sales NVQ Levels 2 & 3

Telesales NVQ Levels 2 & 3

Key Account Management and Sales Management NVQ Level 4

The OCR fees booklet (A250) includes charges for centre evaluation, candidate registration and certification - ask OCR Information for a copy.

The leaflet *Becoming an NVQ Centre: Steps to Implementation* (N61) will be useful to organisations considering applying to OCR to become a centre.

Full details of how to apply is given in *Notes for Guidance* (L526) which is included in the *Centre Approval Pack*, available from our Registry on 024 76 470033.

If you wish to contact an existing assessment centre, please contact OCR Information on 024 76 470033.

We have a team of Regional Business Development Managers who offer advice and information to organisations interested in becoming an OCR Centre. Contact OCR Information to find out how to contact your local manager.

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