Unit Title:	**Preparing and delivering a sales presentation**
OCR unit number:	35
Sector unit number:	SAL3-7
Level:	Level 3
Credit value:	4
Guided learning hours:	28
Unit reference number:	L/502/8631

Unit purpose and aim

The unit is about how to develop and deliver a presentation, including considering your customer's needs and preparing a presentation to meet those needs.

Learning Outcomes	Assessment Criteria	Teaching Content
The Learner will: 1 Understand the factors for consideration in the preparation of sales presentations	**The Learner can:** 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	• Key features of formal and informal presentations, and which are most appropriate for different organisations and client types • Typical aims and objectives of sales presentations in the sector, and the reasons for them. Likely outcomes if aims and objectives are not used or are inappropriate. • The legislation, codes of conduct, and ethics relating to the employment related sector • Examples of items that should be included and inappropriate content.
2 Be able to prepare a sales presentation	2.1 Describe the needs of the customer or audience 2.2 Set objectives for the	• Examples of audiences that presentations are often aimed at within the sector.

Learning Outcomes	Assessment Criteria	Teaching Content
	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	• What outcomes are looked for by both the employment related services organisation and by clients. • Factors that influence: • the choice of location/venue • the structure, style, and content of presentations • other materials such as handouts, brochures etc that should be available. • the timing of the presentation in terms of its duration and also the deadline for its delivery. Common reasons for deadlines, e.g. the announcement of a local or government initiative which is timebound
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	• Different styles of verbal and non-verbal communication used in presentations, and the reasons for using these styles • How and why practice and rehearsal is key to presenting, and the importance of doing so at the actual venue if possible
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	• Different delivery methods such as quiet questions of the audience, or a loud introduction, or other methods of gaining immediate attention. • How different aspects of

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Learning Outcomes	Assessment Criteria	Teaching Content
	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	presentations have differing impact on audiences • Different ways to structure audience participation such as questions from the audience only at the end, at any time, or at set points, and the effect of each on the presentation. • How to evaluate the success of the presentation in terms of audience feedback, immediate sales, appointments made for follow up sales etc.

Assessment

This unit is centre assessed and externally verified. In order to achieve the unit you must produce a portfolio of evidence which, on request, will need to be made available to the OCR external verifier. Portfolios of work must be produced independently and Centres must confirm to OCR that the evidence is authentic. An OCR Centre Authentication form is provided in the Centre Handbook.

Evidence requirements

In order to achieve this unit you must demonstrate that you have met all of the stated learning outcomes and assessment criteria. Your assessor must be able to observe you in the workplace or you must provide tangible evidence of your real work activities.

You may collect evidence for the unit through work in a private sector organisation, a public sector organisation or a not-for-profit organisation.

You must provide evidence that shows you have done this over a sufficient period of time on different occasions for your assessor to be confident that you are competent.

Guidance on assessment and evidence requirements

The assessment of Sales units at any level of a QCF NVQ or competence-based qualification, '… may be based on either candidate performance at work or through RWE, as necessary' (CfA Assessment Strategy 2010).

You should refer to the '*Admin Guide: Vocational Qualifications* (A850)' for *Notes on Preventing Computer-Assisted Malpractice*.

National Occupational Standards (NOS) mapping/signposting

The mapping in the table below provides an indication of where evidence might be available for assessment against some of the knowledge and understanding contained in the national occupational standards (NOS). It does not claim to guarantee that evidence will meet the NOS.

NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk.

Occupational standards	**Unit number**	**Title**
Sales 2010	CFAS 5.3	Develop and deliver a professional sales presentation

Functional skills signposting

This section indicates where candidates may have an opportunity to develop their functional skills.

Functional Skills Standards					
English		**Mathematics**		**ICT**	
Speaking and Listening	✓	Representing		Use ICT systems	
Reading	✓	Analysing		Find and select information	
Writing	✓	Interpreting		Develop, present and communicate information	

Resources

Evidence record sheets and witness statements are available from the OCR website www.ocr.org.uk.

Access to sources of under-pinning knowledge such as websites, books, journals, etc, might be of help, but you are not expected to reproduce other people's written work.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications' (A850)* on the OCR website www.ocr.org.uk .

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