

Unit Title:	Plan, market and sell services
OCR unit number	10
Sector unit number	PT310
Level:	3
Credit value:	5
Guided learning hours:	26
Unit expiry date:	30/04/2015

Unit purpose and aim

This unit covers the knowledge and competence that the learner needs, to plan, market and sell services.

Learning Outcomes	Assessment Criteria
<p>The Learner will:</p> <p>1 Understand how to plan marketing and sales</p>	<p>The Learner can:</p> <p>1.1 Identify the sources of marketing and sales information</p> <p>1.2 Describe how the market is segmented/divided by:</p> <ul style="list-style-type: none"> • age • income • occupation/social class • the benefits that potential clients are looking for <p>1.3 Assess the market in terms of:</p> <ul style="list-style-type: none"> • the pricing of the service • the promotion of the service • customer needs and expectations • trends in the industry <p>1.4 Explain how to identify competitors and assess their strengths and weaknesses</p> <p>1.5 Explain how to identify and assess own strengths and weaknesses</p> <p>1.6 Describe how to develop services that address a certain 'niche' in the market</p> <p>1.7 Explain how to cost services and develop marketing and sales plans that take account of cash flow and tax considerations</p> <p>1.8 Explain the importance of testing proposed products and services with other people and describe how to do so</p> <p>1.9 Explain the importance of having realistic and achievable targets for marketing and sales</p> <p>1.10 Explain how to develop sales and marketing targets</p>

Learning Outcomes	Assessment Criteria
	1.11 Explain the importance of being able to evaluate sales and marketing plans 1.12 Explain ways of monitoring and evaluating marketing and sales
2 Be able to plan marketing and sales	2.1 Research the market according to the service being offered 2.2 Identify existing and new trends in the industry 2.3 Identify competitors and analyse their strengths and weaknesses in comparison to own 2.4 Identify the types of client who might be interested in the services and the benefits they are looking for 2.5 Develop and cost services that will be attractive to potential clients 2.6 Test these services with other people and obtain their feedback 2.7 Set realistic and achievable marketing and sales targets within defined timescales 2.8 Decide how to evaluate the marketing and sales aspects of the service
3 Understand how to market services	3.1 Identify the best ways of reaching potential clients 3.2 Describe the 'image' clients may have of the types of services offered and how to develop an image that is unique 3.3 Explain how to present services so that they and their benefits will be attractive to clients 3.4 Describe different ways to present/market the services 3.5 Explain the importance of being proactive in marketing and reaching potential clients 3.6 Explain the importance of promoting the value and benefits of the services to clients 3.7 Explain the importance of monitoring the effectiveness of marketing and sales activities 3.8 Explain how to overcome problems and improve services 3.9 Describe methods of monitoring marketing and sales
4 Be able to market services	4.1 Identify the best ways to reach potential clients 4.2 Present the services so that they are attractive to potential clients 4.3 Promote the value and benefits of the services to clients 4.4 Keep track of marketing and sales and compare what is being achieved with set targets 4.5 Find ways of improving marketing and sales
5 Understand how to sell services directly to clients	5.1 Explain the importance of being proactive in selling without giving the impression of 'the hard sell' and describe how to do so 5.2 Explain why it is important to correctly identify client's needs and expectations in relation to the services offered 5.3 Explain how to identify services that match or come close to client's needs and expectations 5.4 Explain the importance of ensuring accurate information is provided especially in relation to legal requirements

Learning Outcomes	Assessment Criteria
	<p>covering trade descriptions and sale of goods</p> <p>5.5 Explain the importance of giving clients the opportunity to ask questions and discuss the services and their benefits</p> <p>5.6 Identify buying signals that a client might give and how they can be used to help move the sale on</p> <p>5.7 Explain the importance of negotiating services that meet both own needs and that of the client</p> <p>5.8 Explain how to confirm the client is ready to complete the sale without making them feel rushed and why this is an important stage</p> <p>5.9 Explain why it is important to agree terms with the client and how to do so</p> <p>5.10 Outline the relevant documents that need to be completed and why these are important</p>
<p>6 Be able to sell services directly to clients</p>	<p>6.1 Identify client's needs and expectations</p> <p>6.2 Suggest services that meet client's needs and expectations</p> <p>6.3 Provide information about the services and their benefits clearly, accurately and in a way that will motivate the client to take them up</p> <p>6.4 Give the client full opportunity to ask questions and discuss the services and their benefits and if necessary, think about their decision</p> <p>6.5 Identify buying signals from the client and use these to move the sale on</p> <p>6.6 Offer and agree a service that meets own needs and those of the client</p> <p>6.7 Ensure the client is ready to commit themselves to the sale</p> <p>6.8 Agree terms with the client and make sure they are satisfied with the sale</p> <p>6.9 Ensure all relevant documents are completed</p>
<p>7 Understand how to follow up marketing and client enquiries</p>	<p>7.1 Explain the importance of keeping up to date information on marketing and client enquiries</p> <p>7.2 Outline the features of a client service management system and how to choose a method that is most appropriate to the business/service offered</p> <p>7.3 Outline the legal and organisational requirements for data protection and how to ensure that they are followed</p>
<p>8 Be able to follow up marketing and client enquiries</p>	<p>8.1 Develop and keep up-to-date a client service management system</p> <p>8.2 Keep in regular contact with existing clients and with those who have made enquiries</p> <p>8.3 Provide existing clients and prospective clients with information on new and existing services</p> <p>8.4 Respond promptly and positively to further enquiries and make efforts to obtain new business</p> <p>8.5 Follow all legal and organisational requirements for data protection</p>

Assessment

This qualification is internally assessed by centre staff and externally verified by OCR Assessors.

Evidence requirements

This unit can be assessed by using a variety of methods from workplace evidence. This may be gathered through a combination of assessor observations, witness testimony and/or authentic records of the learner's work (for example, diaries and/or reflective accounts countersigned by a senior colleague).

Please refer to Section 3 of the Centre Handbook for detailed information about conducting assessment and producing valid candidate evidence.

There must be evidence that the learner has met all of the assessment criteria listed against 'the learner will be able to' through their own work.

This evidence must be gathered by the assessor observing the learner on more than one occasion. There should be sufficient observations to ensure that the learner has met all the requirements.

Simulation

Simulation is not allowed for this unit.

Knowledge and understanding

There must be evidence that the learner possesses all of the knowledge and understanding shown in the unit assessment criteria listed against 'the learner will know how to'. In most cases this can be done by the assessor questioning the learner orally. However, other techniques, such as projects, assignments and/or reflective accounts may also be appropriate.

Assessors should note that some of the knowledge and understanding items require the learner to show that they know and understand how to do something. If there is evidence from the learner's own work that they know and understand this technique (as there should be), there is no requirement for them to be questioned again on this topic.

Guidance on assessment and evidence requirements

There must also be evidence that the learner's work has met the following **minimum** requirements:

Learning Outcomes 1, 3, 5 and 7

These can be assessed by;

- professional discussion
- oral questions and answers
- questions requiring written answers

Learning Outcomes 2, 4, 6 and 8 must be assessed using workplace evidence generated when the learner is planning, marketing and selling services.

Learning Outcome 2

When planning marketing and sales the learner **must** cover **both** of the following types of market:

- existing
- new

Learning Outcome 4

When marketing services the learner must cover 2 of the following types of best ways to reach potential clients:

- personally
- through other people

with a **minimum** of 2 of the following types of ways to present the services:

- talking to people directly
- using printed materials
- electronically

Learning Outcome 6

When selling services directly to clients the learner **must** cover **2** of the following types of information:

- spoken
- written
- electronic

Learning Outcome 8

When following up marketing and client enquiries the learner **must** cover **2** of the following types of information:

- spoken
- written
- electronic

National Occupational Standards (NOS) mapping/signposting

B242 Plan, market and sell services

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

Functional skills signposting

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

The functional skills standards can be found to view on the Ofqual website:

<http://www.ofqual.gov.uk/qualification-and-assessment-framework/89-articles/238-functional-skills-criteria>

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

The specific requirements for the Level 3 Diploma in Personal Training NVQ include:

1. Sufficient space for the safe and effective delivery of personal training activities (this should take into account health and safety requirements, equal opportunities practice (e.g. taking into account any special requirements or disabilities of learners), and the number of learners being assessed. The space required will be determined by the activity being undertaken.
2. Sufficient and safe equipment that is fit for purpose and in good working order enabling all aspects of the standards to be met (this should take into account the need to keep appropriate records regarding the maintenance and calibration of equipment according to manufacturers guidelines. The range of available equipment should enable learners to be assessed in all relevant aspects of the standard according to the evidence requirements. The equipment required will be determined by the activity (eg for gym a range of free weights, resistance and cardio machines will be required to meet the evidence requirements).

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 .