



Digital Industries Apprenticeship: Occupational Brief

Technical Salesperson

September 2016

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Level 3 Technical Salesperson Apprenticeship

Minimum Standards and Grading Criteria

This paper defines the minimum requirements for the knowledge, skills and behaviours defined in the standard, which are required for a pass. It also defines the criteria to be used for awarding the grade for merit or distinction. This paper should be read in conjunction with the Standard and Assessment Plan for the Level 3 Technical Salesperson Apprenticeship

Overview of Grading

There are three sets of criteria on which the assessment and grading is made. The three criteria are

The What: what the apprentice has shown they can do,

The How: the way in which the work has been done

The With Whom: The personal and interpersonal qualities the apprentice has brought to all their work relationships

Each of these three criteria has minimum (expected) requirements, which must be satisfied for a pass.

Each of these criteria has a number of dimensions which should be considered to determine if the apprentice is significantly above the minimum (expected) level of quality

The purpose of grading is to differentiate between those apprentices whose work is at the expected level of quality against the totality of the skills, knowledge and behaviours specified in the standard and those whose work is significantly above this expected level

For a pass, each of the three sets of criteria must demonstrate at least the expected (minimum requirement) level of quality

For a merit, the What has to be significantly above the level of quality and one of either the How or the With Whom has to be significantly above the level of quality expected

For a distinction, each of the three sets of criteria must be significantly above the expected level of quality

The assessor takes a holistic judgement of whether or not their assessments demonstrate that the apprentice is “significantly above the expected level of quality” in each of these three areas and can then determine which grade should be awarded

The what – what the apprentice has shown they can do

Minimum Requirements

The following table shows what the minimum, expected requirements are for a pass on this criteria

Competency Standard	Minimum, expected, requirements for a pass
<p>Communication Works both independently and as part of a team and following the organisations code of practice; competently demonstrating an ability to communicate both in writing and orally at all levels, using a range of tools</p>	<p>The apprentice should be able to communicate confidently in the following areas:</p> <ul style="list-style-type: none"> • Oral • Face-to-face • Remote • Diagrammatic
<p>Customer Experience Demonstrates strong interpersonal skills and cultural awareness when dealing with colleagues, customers and clients during sales operations and whilst defining requirements with an emphasis on customer satisfaction and relationship management</p>	<p>The apprentice should be able to demonstrate and compile different forms of written professional correspondence.</p> <p>The apprentice must be able to explain different types of communication styles to ensure cultural awareness and appropriateness for customer is taken into account.</p> <p>The apprentice must demonstrate methodologies used to maintain customer relationships.</p>
<p>Data Security Operates securely in line with organisational guidance, legislation and organisational software packages and complies with security of data and can effectively record, analyse and communicate data at the appropriate level using the organisation’s standard tools and processes throughout all sales interactions</p>	<p>The apprentice must demonstrate how they comply with organisational security processes and how they would recognised and escalate issues.</p> <p>The apprentice must be able to locate and follow policies and legislation.</p> <p>The apprentice must be able to select and securely use a minimum of 3 analytical tools when working with and analysing data.</p>

<p>Problem solving Applies structured techniques to problem solving and analyses problems by selecting the appropriate tools and techniques in line with organisation guidance when dealing with sales as well as routine tasks</p>	<p>The apprentice must be able to select and use a minimum of 4 tools for testing, troubleshooting and analysing problems.</p> <p>The apprentice must be able to demonstrate compliance with organisational guidance.</p> <p>The apprentice should demonstrate processes and practices for obtaining logistical support.</p>
<p>Assesses and qualifies sales leads by developing a clear understanding of clients' business needs and advising how these might be met with appropriate products, tools and techniques</p>	<p>The apprentice must be able to work effectively with clients to understand what they are trying to achieve and to provide sound advice on how the products, tools and techniques that the company sells can help achieve those business aims.</p>
<p>Project management Works flexibly and demonstrates the ability to work under pressure independently and as part of a team to progress sales and manage their time, workflow, priorities and projects.</p>	<p>The apprentice must be able to demonstrate the ability to prioritise workflow and manage allocated tasks.</p> <p>The apprentice must be able to record tasks and comply with organisations quality processes.</p>
<p>Legislations Interprets and follows:</p> <ul style="list-style-type: none"> • health and safety legislation to securely and professional work productively in the work environment • Data Protection Act 1998 • Sales of Goods Act 1979 	<p>The apprentice must be able to demonstrate their interpretation and secure working practices in accordance with IT legislation and where to locate the appropriate documentation</p> <p>The apprentice must demonstrate an understanding and apply Health & Safety policies to every day work.</p> <p>The apprentice must demonstrate they understand the appropriate legislations relevant to their work and how to operate within these guidelines.</p>
<p>Sales process Professionally operates all sales related tasks to maintain integrity, brand and company image during negotiations, handling of objections and closing sales</p>	<p>The apprentice must be able to demonstrate an understanding of the organisations ethos</p> <p>The apprentice must demonstrate they can work in a professional manner</p> <p>The apprentice must be able to demonstrate they can follow the sales lifecycle using the appropriate technologies</p>

with an understanding of the markets and external competitors	
Technical Ability to understand and explain the technical portfolio and technical systems sold within the organisation and can use current hardware and operating systems available	<p>The Apprentice must be able to demonstrate a sound grasp of the technologies within the portfolio of products and solutions their employer sells.</p> <p>The apprentice must be able to work effectively with customers to understand the business objectives of those customers and to propose suitable products and solutions to address those business objectives.</p>
Database and Campaign management Ability to prioritise their contacts and keep an up to date database knowing when and why to contact current consumers or prospects in line with organisational requirements	<p>The apprentice must be able to demonstrate a minimum of 2 technical systems to record customer and campaign information</p> <p>The apprentice must be able to demonstrate how to run reports and gain up to date information</p> <p>The apprentice must be able to demonstrate they can present the data professionally</p>
Context / CPD Identifies and negotiates personal development in the context of the wider business and how their role relates to other roles in the business	<p>The apprentice must be able to demonstrate an appreciation of business objectives and their own role, and to express their own development needs verbally and in writing in that context.</p>

The What – what the apprentice has shown they can do

Criteria for a Merit or Distinction

The following table shows what the apprentices would need to demonstrate to be assessed as significantly above the expected level for what they have done

Dimensions	Description of what significantly above the expected level of quality looks like
Breadth – the range of tools and methods understand and applied	<p>Understands and applies a wide range of tools and methods</p> <p>Accurately and appropriately applies and effectively implements the right tools and methods in a variety of different situations</p>

Depth – the level to which these tools and methods are understood and applied	<p>A capable user - exploits the functionality/capability of the tools and methods</p> <p>Broad understanding of different tools and methods and how and why they can be applied in different contexts</p>
Complexity – the extent and prevalence of inter-related and inter-dependant factors in the work and how well the apprentice has dealt with these	<p>Deals confidently and capably with interrelated and interdependent factors in their work</p>

The how: the way in which the work has been done

The following table shows what the minimum, expected requirements are for a pass on this criteria

Competency Standard	Minimum expected requirements for a pass
Apprentices can demonstrate the full range of skills, knowledge and behaviours required to fulfil their job role	<ul style="list-style-type: none"> Knows what skills, knowledge and behaviours are needed to do the job well Are aware of their own strengths in the job role, and any areas for improvement Appreciate who else is important, for them to do their job and fulfil the role effectively (e.g. colleagues, managers, other stakeholders) Are aware of potential risks in the job role (e.g. security, privacy, regulatory) Use personal attributes effectively in the role Understand how the job fits into the organisation as a whole
Apprentices can demonstrate how they contribute to the wider business objectives and show an understanding of the wider business environments	<ul style="list-style-type: none"> Understands the goals, vision and values of the organisation Aware of the commercial objectives of the tasks/ projects they are working on Understands their role in meeting or exceeding customers' requirements and expectations Is in tune with the organisation's culture
Apprentices can demonstrate the ability to use both logical and creative thinking skills	Logical thinking:

<p>when undertaking work tasks, recognising and applying techniques from both.</p>	<ul style="list-style-type: none"> • Recognises the conclusion to be reached • Proceeds by rational steps • Evaluates information, judging its relevance and value • Supports conclusions, using reasoned arguments and evidence <p>Creative thinking:</p> <ul style="list-style-type: none"> • Explores ideas and possibilities • Makes connections between different aspects • Embraces ideas and approaches as conditions or circumstances change
<p>Apprentices can show that they recognise problems inherent in, or emerging during, work tasks, and can tackle them effectively</p>	<p>Problem-solving:</p> <ul style="list-style-type: none"> • Analyses situations • Defines goals • Contributes to the development of solutions • Prioritises actions • Deals with unexpected occurrences

The How: the way in which the work has been done

Criteria for a Merit or Distinction

The following table shows what the apprentices would need to demonstrate to be assessed as significantly above the expected level for the way in which the work has been done

Dimensions	Description of what significantly above the expected level of quality looks like
<p>Responsibility – the scope of responsibility and level of accountability demonstrated in the apprentices work</p>	<p>Undertakes work that is more complex, more critical or more difficult</p> <p>Works independently and takes responsibility</p>
<p>Initiative</p>	<p>Demonstrates an ability to extend or enhance their approach to work and the quality of outcomes</p>

	Doesn't just solve the problem but explores all known options to do it better, more efficiently, more elegantly or to better meet customer needs
Delivery focus – the extent to which the apprentice has shown they can grasp the problems, identify solutions and make them happen to meet client needs	<p>Shows good project management skills, in defining problem, identifying solutions and making them happen</p> <p>Demonstrates a disciplined approach to execution, harnessing resources effectively</p> <p>Drives solutions – with a strong goal focused and appropriate level of urgency</p>

The with whom: the personal and interpersonal qualities the apprentice has brought to internal and external relationships

Minimum Requirements

The following table shows what the minimum, expected requirements are for a pass on this criteria

	Minimum expected requirements for a pass
<p>Apprentices can manage relationships with work colleagues, including those in more senior roles, customers/clients and other stakeholders, internal or external and as appropriate to their roles, so as to gain their confidence, keep them involved and maintain their support for the task/project in hand</p> <p>Apprentices can establish and maintain productive working relationships, and can use a range of different techniques for doing so.</p>	<p>Managing relationships:</p> <ul style="list-style-type: none"> • Understands the value and importance of good relationships • Acknowledges other people's accomplishments and strengths • Understands how to deal with conflict • Promotes teamwork by participating <p>Customer/client relationships:</p> <ul style="list-style-type: none"> • Understands their requirements, including constraints and limiting factors • Sets reasonable expectations • Understands how to communicate with them in decisions and actions • Interacts positively with them • Provides a complete answer in response to queries ('transparency', 'full disclosure') <p>Stakeholders:</p> <ul style="list-style-type: none"> • Understands who they are and what their 'stake' is • Prioritises stakeholders in terms of their importance, power to affect the task and interest in it • Agrees objectives
<p>Apprentices can communicate effectively with a range of people at work, one-to-one and in groups, in different situations and using a variety of methods.</p> <p>Apprentices can demonstrate various methods of communication, with an understanding of the strengths, weaknesses and limitations of these, the factors that</p>	<p>Intention/purpose:</p> <ul style="list-style-type: none"> • Understands the purpose of communicating in a particular situation or circumstance (e.g. inform, instruct, suggest, discuss, negotiate etc.) • Checks that the person/people with whom one is communicating also understand the purpose • Is sensitive to the dynamics of the situation • Is aware of anything that might disrupt the effectiveness of the communication (e.g. status, past history) <p>a. Method:</p>

<p>may disrupt it, and the importance of checking other people's understanding.</p>	<ul style="list-style-type: none"> • Understands the most appropriate method for the situation • Aware of the limitations of the chosen method, and the possible risks of miscommunication (e.g. ambiguity) • Takes account of the affective dimensions of the method (e.g. body language, tone of voice, eye contact, facial expression etc.) <p>b. Execution:</p> <ul style="list-style-type: none"> • Expresses self clearly and succinctly, but not over-simplifying • Checks that the other person/people understand what is being expressed • Takes account of the potential barriers to understanding (e.g. filtering, selective perception, information overload) • Modifies the purpose and methods of communication during a situation in response to cues from the other person/people
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The With Whom: the personal and interpersonal qualities the apprentice has brought to internal and external relationships

Criteria for Merit or Distinction

The following table shows what the apprentices would need to demonstrate to be assessed as significantly above the expected level for the personal and interpersonal qualities the apprentice has brought to internal and external relationships

Dimensions	Description of what significantly above the expected level of quality looks like
<p>Scope and appropriateness – the range of internal and external people and situations that the apprentice has engaged appropriately and effectively with</p>	<p>Internally – works alone, 1:1, in a team and with colleagues at all levels</p> <p>Externally – works with customers, suppliers and partners in a variety of situations</p> <p>Reads situations, adapts behaviours, and communicates appropriately for the situation and the audience</p>
<p>Reliability – the extent to which they perform and behave professionally</p>	<p>Can be trusted to deliver, perform and behave professionally, manages and delivers against expectations, proactively updates colleagues and behaves in line with the values and business ethics</p>

A role model and exemplar to others

Actively works with others and leads by example
