

Sales Executive Apprenticeship Overview



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Overview of the Sales Executive Level 4 Apprenticeship Standard

At Elite Training we're delighted to offer the Sales Executive Level 4 apprenticeship standard for organisational cohorts, which require a minimum of 12 apprentices, and open programmes, delivered remotely and/or with other local organisations. Contact us if:

- you're interested in Elite designing and delivering an apprenticeship standard for your organisation
- to express an interest in our next open programmes and we'll reach out when we have provisional dates.

Here we provide an overview and key information about the Sales Executive apprenticeship, including who the standard is designed for, duration, maximum apprenticeship funding level, the standard's qualification level and progression. Followed by a summary listing the Knowledge, Skills and Behaviours (KSB) covered. We've also provided information on the wide mix of learning and how this is broken down. Finally a table expands the KSBs required, hence contents, along with initial notes for the employer and Elite to commence planning these standards.

Apprenticeship Standard	Sales Executive Level 4
Overview	Leading end-to-end sales interaction with customers and managing sales internally within an organisation.
Typical responsibilities	Selling a specific product line or service in Business-to-Business (B2B) or Business-to-Consumer (B2C) markets, by retaining and growing a number of existing customer accounts, and generating new business by contacting prospective customers, qualifying opportunities and bringing the sales process to a mutually acceptable close.
Who	Sales Executive, Sales Consultant, Sales Specialist, Sales Advisor, Sales Representative, Business Development Executive, etc.
Planned Duration [^]	12 months (typically 18 months).
Max Funding	Your investment for this apprenticeship standard is normally £6,000 per apprentice, paid directly from your apprenticeship levy pot, or if you're a non-levy paying employer (or have insufficient funds in your apprenticeship levy account), the Government would co-invest 95%, hence your organisation would invest just £300 + VAT per apprentice.
Entry Requirements	Decided by each employer, e.g. Five GCSEs at Grade C or higher. Apprentices without level 2 English and Maths will need to achieve this prior to the End Point Assessment (EPA).
Progression	On completion apprentices are eligible for Sales Certification at Level 4 with the Association of Professional Sales (APS). Full APS memberships is £195 pa with post-nominals M.APS.

[^] Apprenticeships must last a minimum of twelve months and involve at least 20% Off The Job (OTJ) training, e.g. Training courses, coaching, shadowing colleagues, mentor support, managing projects, reading, etc. Given the typical calibre of Sales Executives we train and pressures on them, our usual design for this apprenticeship is over a twelve month timeframe.

A wide mix of learning is expected from an apprenticeship standard, e.g. Formal OTJ training, in the workplace and the opportunity to practise new skills in a real work environment. To meet this and ensure Learning and Development (L&D) is relevant to employers and apprentices, whilst meeting apprenticeship standards' requirements, we apply the principles of:

- 30% Training: Courses and dedicated L&D Events (e.g. Business Games)
- 20% Support: Coaching, line manager, employer mentor, apprentice learning team and buddy
- 50% Experience: Projects and assignments, putting L&D into practice on-the-job, with continuous improvement.

Applying this to the Sales Executive standard, the below Knowledge, Skills and Behaviours (KSBs) are:

- delivered in one training day per month across the year
- supported with one hour's coaching per month, weekly half-an-hour line manager one-to-ones and shadowing, monthly half-an-hour employer mentor and 90 minutes learning team and buddy support each month
- further developed, applying this learning in a structured approach, on-the-job, with continuous improvement, totalling 23 days during the year
- the standard would conclude with EPA preparation and the EPA.

To ensure the 50% Experience elements count towards the 20% OTJ training requirement, the employer and Elite plan apprenticeships around the employer's annual cycles, and utilise opportunities to practise KSBs alongside relevant modules. e.g. Commercial and Financial Acumen training just before the start of the annual budgeting review process. Additionally, the employer needs to consider opportunities for apprentices to practise KSBs if their current role doesn't facilitate this, e.g. If an apprentice doesn't close sales, provide a opportunity for them to do this following the Closing Sales module.

Sales Executive Knowledge:

- Organisational Knowledge
- Product, Service and Sector Knowledge
- Market Knowledge
- Customer Knowledge
- Commercial and Financial Acumen
- Digital Knowledge

Sales Executive Skills:

- Sales Planning and Preparation
- Customer Engagement
- Customer Needs Analysis
- Propose and Present Solutions
- Negotiate
- Closing Sales
- Gathering Intelligence
- Time Management
- Collaboration and Team-work
- Customer Experience Management
- Digital Skills

Sales Executive Professional Behaviours and Values:

- Ethics and Integrity
- Proactivity
- Self-discipline
- Resilience and Self-motivation
- Continuous Professional Development.

The following table expands the required Knowledge, Skills and Behaviours (KSBs), hence contents, along with initial notes for the employer and Elite to commence planning these standards.

Knowledge	What is Required	Key Notes & Next Steps
Organisational Knowledge	Understand your organisation’s vision, values & capabilities, the principle goals of its overall strategy, & the specific objectives of its marketing & sales strategies. Know how to analyse your organisation’s sales & marketing strategies & objectives & translate them into plans & actions for your role.	The employer to provide organisational statements & marketing/sales strategies.

Knowledge	What is Required	Key Notes & Next Steps
Product, Service & Sector Knowledge	Identify the features & advantages of the product(s) and/or services(s) you sell, understand how these meet customer needs, & examine how they compare to competitor's solutions. Understand the nature of your sector & the likely forthcoming changes to it. Understand the legal, regulatory & ethical frameworks relating to your sector & role.	The employer to provide details of products/services, sector & competitors, plus relevant legal, regulatory & ethical frameworks.
Market Knowledge	Understand how your market is segmented & how to target specific segments through effective product or service positioning.	The employer to provide any existing market segmentation documentation.
Customer Knowledge	Know how to analyse the macro & micro environment of individual customers. Understand the challenges & purchasing motivations of your customers & the internal & external factors that impact their purchasing decisions. Understand expectations of what constitutes a high-quality customer experience.	The employer to share Customer Experience (CX) strategy, objectives & plans.
Commercial & Financial Acumen	Understand the principles of finance for sales, such as profit & loss, return on investment & budgeting. Appreciate the impacts of different types of costs on the business & the drivers of profitable performance. Understand the impact of any discount or variation in terms that you may offer.	The employer to advise finance methodologies. Plan timing to deliver prior to the employer's annual budget process, so apprentices' output can feed into budget setting/planning.
Digital Knowledge	Understands how to exploit digital technologies to aid the sales cycle.	The employer to advise relevant digital technologies used.

Skills	What is Required	Key Notes & Next Steps
Sales Planning & Preparation	Set effective targets using sales forecasts. Prioritise customers & activities to grow account value & maximise return-on-investment in line with your organisation's strategy. Formulate or refine customer plans & objectives. Create efficient territory plans where appropriate.	The employer to share relevant territory plans.
Customer Engagement	Effectively communicate & interpret customer information exchanged through written, verbal & non-verbal communication. Develop a customer engagement style that effectively opens sales conversations, builds rapport, enhances customer relationships, & adapts to different customer's social preferences.	The employer to share any customer engagement standards.

Skills	What is Required	Key Notes & Next Steps
Customer Needs Analysis	Be highly skilled at effective questioning & active listening techniques to understand the customer's needs, guide the sales conversation appropriately, create mutual understanding, & build trust & affinity with customers.	The employer to share any customer needs analysis guidance.
Propose & Present Solutions	Develop sales proposals & deliver them using a presentation style & technique appropriate for your customer. Present relevant products and/or services, explain features & their advantages, & clearly articulate the value & benefit of the solution for the specific customer. Use & adapt a range of techniques to draw-out & overcome common sales objections.	The employer to share proposal & presentation templates & guidance, & provide the opportunity for apprentices to present at least three times after this module, including at least two using digital communication.
Negotiate	Research the customer's likely desired outcomes & negotiating stance. Develop responses to likely objections. Identify your own organisation's needs, such as minimum price & acceptable terms. Negotiate or trade variables effectively.	The employer to share expectations from a sale.
Closing Sales	Be attuned to verbal & non-verbal buying-signals & move to close at an appropriate point in sales conversations. Develop ethical techniques to close sales & confirm customers' purchase agreement.	See Negotiate Skill above.
Gathering Intelligence	Collect, analyse & interpret market intelligence & share it appropriately & effectively within your organisation.	The employer to advise expectations of intelligence for apprentices to gather/share, e.g. Mini project(s) or routinely.
Time Management	Use & adapt appropriate tools & techniques to prioritise & manage your time effectively.	The employer to advise their time management tools (if they exists).
Collaboration & Team-work	Contribute effectively within a team environment. Work collaboratively with both internal & external stakeholders. Manage communications with the cross-functional team in relation to the effective delivery of your sales, such as finance & service delivery. Support continual business improvement by sharing best practice with sales team colleagues & assist the marketing team to develop new marketing collateral.	The employer to provide stakeholder plans. Time this module with the start of an apprentice project & include a requirement to work collaboratively, with internal & external stakeholders.

Skills	What is Required	Key Notes & Next Steps
Customer Experience Management	Deliver a positive customer experience. Manage customer enquiries & issues effectively. Take proactive action to prevent & minimise customer concerns & complaints. Handle all customer interactions professionally to the customer's satisfaction.	See other Customer Knowledge & Skills above.
Digital Skills	Effectively use digital tools to conduct research & target customers in line with the overall sales strategy. Able to deliver presentations & meetings using digital communication. Complete accurate records & process sales in accordance with your organisation's policies, procedures & digital CRM systems.	Employer to share policies & procedures relevant to record keeping & the sales process. See also Present Solutions Knowledge above.

Behaviours	What is Required	Key Notes & Next Steps
Ethics & Integrity	Present yourself as an ambassador for your employer's brand, & act in accordance with your organisation's values & code of conduct at all times. Maintain integrity in all business relationships. Challenge unethical behaviour.	Cover professional behaviours & values in first training session, then continuously throughout apprenticeship. The standard has the opportunity to include 360 degree appraisals & apply learnings during the apprenticeship.
Proactivity	Proactively develop new & existing customer relationships. Plan & lead sales conversations & make recommendations to support the customers' requirements. Proactively monitor the customer experience.	
Self-discipline	Demonstrate the ability to control your actions, reactions & emotions. Remain calm under pressure & be aware of your personal impact on others.	
Resilience & Self-motivation	Demonstrate the ability to maintain optimism & professionalism in the face of rejection, quickly recover from setbacks, adapt well to change, & keep going in the face of adversity. Remain highly motivated to achieve both personal & professional goals.	
Continuous Professional Development (CPD)	Respond positively to coaching, guidance or instruction; demonstrate awareness & ownership of your continual professional development, & actively seek out development opportunities outside of formal learning situations.	
		Employer to share CPD expectations, guidance & template/tool.

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