



<b>Unit title</b>	Relationship Management for Account Managers
<b>SQA code</b>	H8RR 04
<b>SCQF level</b>	8
<b>SCQF credit points</b>	7
<b>SSC ref</b>	N/A

## History of changes

**Publication date:** March 2015

**Version:** 01

<b>Version number</b>	<b>Date</b>	<b>Description</b>	<b>Authorised by</b>

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Title	Relationship Management for Account Managers	
Learning Outcomes		Assessment Criteria
The candidate will:		The candidate can:
1	Understand how to build relationships with accounts.	<p>1.1 Explain what information is needed about the account and competitors.</p> <p>1.2 Describe how to build trust with accounts.</p> <p>1.3 Explain how to provide expertise to improve the productivity of the account.</p> <p>1.4 Explain how to reduce the account's financial burden.</p> <p>1.5 Explain how to improve the quality of service provision.</p> <p>1.6 Describe how to maintain account loyalty to own organisation.</p>
2	Understand how to use networking in sales.	<p>2.1 Evaluate methods for developing a personal network of contacts to meet current and future needs for information, resources and sales opportunities.</p> <p>2.2 Explain the importance of reciprocity and confidentiality in networking.</p> <p>2.3 Evaluate methods for maintaining communication with contacts in personal network.</p>
3	Understand how to use consultative selling.	<p>3.1 Evaluate methods for researching prospective customer organisations suitable for consultative selling.</p> <p>3.2 Evaluate methods for establishing rapport and own credentials with customer organisation.</p> <p>3.3 Evaluate strategic questions to identify issues in the customer organisation which represent sales opportunities.</p>

<b>Learning Outcomes</b>	<b>Assessment Criteria</b>
<b>The candidate will:</b>	<b>The candidate can:</b>
	<p>3.4 Quantify in financial and strategic terms the effects of the most important issue or opportunity.</p> <p>3.5 Evaluate solutions for the customer organisation issue.</p>
<p>4 Know when and how to undertake stakeholder analysis.</p>	<p>4.1 Describe the importance of and the need for stakeholder analysis.</p> <p>4.2 Describe how to identify and analyse the needs and concerns of different stakeholders.</p>
<p>5 Understand how to monitor and control customer relationships.</p>	<p>5.1 Evaluate the concept of monitoring and control in maintaining relationship management activities.</p> <p>5.2 Evaluate own organisation's requirements relating to monitoring and control activities.</p> <p>5.3 Evaluate methods of formal and informal feedback for monitoring of key customer activities.</p> <p>5.4 Identify and evaluate techniques to be used to analyse information obtained during monitoring and control.</p> <p>5.5 Identify key strengths and weaknesses of the relationship and areas for improvement.</p>

<b>Additional information about the Unit</b>
<b>Unit purpose and aim(s)</b>
This Unit is designed to develop the candidates knowledge, understanding and skills in relationship management. Candidates will be required to demonstrate their understanding of how to build relationships with accounts, how to use personal networking in sales, how to use consultative selling, how to undertake a stakeholder analysis and how to monitor and control customer control customer relationships.
<b>Details of the relationship between the Unit and relevant national occupational standards (if appropriate)</b>
N/A
<b>Details of the relationship between the Unit and other standards or curricula (if appropriate)</b>
N/A
<b>Assessment requirements specified by a sector or regulatory body (if appropriate)</b>
N/A

## Assessment (evidence) Requirements

Candidates must cover all the Learning Outcomes and Assessment Criteria.

This Unit is designed to assess the skills of candidates in the workplace. Observation of candidate performance can only be carried out on-the-job and should be the preferred source of evidence of competent performance.

Collection of supplementary evidence of performance can be used to further substantiate, support and expand the evidence base for competent performance where this is necessary. This may arise in situations where evidence from direct observation of the candidates on-the-job is deemed insufficient to fully meet the required standards. Supplementary evidence may include:

- ◆ witness testimony
- ◆ questioning
- ◆ professional discussion
- ◆ product and photographic evidence
- ◆ relevant active documentation, reports, presentations
- ◆ other valid evidence which relates directly to Candidate performance on-the job

Evidence for this Unit is likely to be presented in the form of a portfolio.

## Guidance on Instruments of Assessment

SQA's Guide to Assessment provides further information on appropriate Instruments of Assessment. This guide is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website **[www.sqa.org.uk](http://www.sqa.org.uk)**.