



Qualification Specification

ProQual Level 2 Diploma in Starting a Hair, Beauty or Aesthetics Business

ProQual Level 2 Diploma in Starting a Hair, Beauty or Aesthetics Business



This qualification is part of ProQual's broad offer of qualifications in the Hair, Beauty and Aesthetics Sector.

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Introduction

The ProQual Level 2 Diploma in Starting a Hair, Beauty or Aesthetics Business provides a nationally recognised qualification for individuals looking to set up and run their own business in the hair and beauty industry. It equips learners with the essential knowledge and practical skills needed to establish a successful business, covering key areas such as customer service, business planning, and salon management, with a wide range of practical units such covering areas such as marketing and business finance.

The aims of this qualification are:

- To develop and demonstrate their understanding of the fundamental principles of starting and managing a hair and beauty business.
- To develop skills to attract and retain clients, manage finances, and create effective marketing strategies.
- To provide a progression route for those working or wanting to work in the Hair, Beauty and Aesthetics industry.

As a knowledge based qualification, this diploma would be suitable for distance or blended learning.

The awarding body for this qualification is ProQual AB. This qualification has been approved for delivery in England. The regulatory body for this qualification is Ofqual, and this qualification has been accredited onto the Regulated Qualification Framework (RQF), and has been published in Ofqual's Register of Qualifications.

Qualification Profile

Qualification Title:	ProQual Level 2 Diploma in Starting a Hair, Beauty or Aesthetics Business
Qualification Number:	610/5427/6
Level:	2
Total Qualification Time (TQT):	370 Hours 37 Credits
Guided Learning Hours (GLH):	280 Hours
Assessment:	Pass/Fail
	Internally assessed and assured by centre staff
	Externally verified by ProQual verifiers
Qualification Start Date:	31/03/2025
Qualification Review Date:	31/03/2028

Learner Profile

There are no formal academic entry requirements for these qualifications. Centres should carry out their own assessment of candidate's knowledge and skills to identify gaps and determine the assessment plan.

Candidates must be **at least 14** years old on the day that they are registered for this qualification, centres are reminded that no assessment activity may take place before a candidate has been registered.

Candidates who complete this qualification may progress onto other qualifications within the ProQual Hair, Beauty and Aesthetics suite.

Qualification Structure

This qualification consists of **three** mandatory units. Candidates must complete all mandatory units to complete this qualification. Candidates must then complete **at least three** optional units. Candidates may complete more than three optional units if they wish to do so.

Unit Number	Unit Title	Level	TQT	GLH
Mandatory Units – Candidates must complete all units in this group.				
K/651/2430	Working in a Salon Environment	2	20	10
J/651/5248	Employment Rights and Responsibilities	2	20	10
A/651/5154	Principles and Practice of Freelance Services	2	100	80
Optional Units – Candidates must complete three units in this group.				
T/651/4992	Winning and Retaining Customers	2	100	80
J/651/5012	Managing Brand Identity and Reputation	2	80	60
T/651/5161	Understanding Business Structures	2	70	50
Y/651/4993	Social Media for Business	2	80	70
F/651/4996	SEO for Business	2	80	70
A/651/5064	Selling Products and Services Face to Face	2	100	80
Y/651/5162	Principles and Practice of Financial Records for Business	2	120	100
A/651/5163	Managing Cash Flow for Business	2	100	90
D/651/5164	Principles and Practice of Business Banking	2	100	80

Centre Requirements

Centres must be approved to deliver this qualification. If your centre is not approved to deliver this qualification, please complete and submit the **ProQual Additional Qualification Approval Form**.

Materials produced by centres to support candidates should:

- Enable them to track their achievements as they progress through the learning outcomes and assessment criteria.
- Provide information on where ProQual's policies and procedures can be viewed.
- Provide a means of enabling Internal and External Quality Assurance staff to authenticate evidence.

Centres must have the appropriate equipment to enable candidates to carry out the practical requirements of this qualification.

Certification

Candidates who achieve the requirements for this qualification will be awarded:

- A certificate listing all units achieved, and
- A certificate giving the full qualification title:

ProQual Level 2 Diploma in Starting a Hair, Beauty and Aesthetics Business

Claiming certificates

Centres may claim certificates for candidates who have been registered with ProQual and who have successfully achieved the qualification. All certificates will be issued to the centre for successful candidates.

Unit certificates

If a candidate does not achieve all of the units required for a qualification, the centre may claim a unit certificate for the candidate which will list all of the units achieved.

Replacement certificates

If a replacement certificate is required a request must be made to ProQual in writing. Replacement certificates are labelled as such and are only provided when the claim has been authenticated. Refer to the Fee Schedule for details of charges for replacement.

Assessment Requirements

Each candidate is required to produce a portfolio of evidence which demonstrates their achievement of all of the learning outcomes and assessment criteria for each unit.

Evidence can include:

- Observation report by assessor.
- Assignments/projects/reports.
- Professional discussion.
- Witness testimony.
- Candidate product.
- Worksheets.
- Record of oral and written questioning.
- Recognition of Prior Learning.

Candidates must demonstrate the level of competence described in the units. Assessment is the process of measuring a candidate's skill, knowledge and understanding against the standards set in the qualification.

Centre staff assessing this qualification must be **occupationally competent** and qualified to make assessment decisions. Assessors who are suitably qualified may hold a qualification such as, but not limited to:

- ProQual Level 3 Certificate in Teaching, Training and Assessment.
- ProQual Level 3 Award in Education and Training.
- ProQual Level 3 Award in Assessing Competence in the Work Environment.
(Suitable for assessment taking place in a working salon only.)
- ProQual Level 3 Award in Assessing Vocational Achievement.
(Suitable for assessment taking place in a simulated training environment only.)

Candidate portfolios must be internally verified by centre staff who are **occupationally knowledgeable** and qualified to make quality assurance decisions. Internal verifiers who are suitably qualified may hold a qualification such as:

- ProQual Level 4 Award in the Internal QA of Assessment Processes and Practice.
- ProQual Level 4 Certificate in Leading the Internal QA of Assessment Processes and Practice.

Occupationally competent means capable of carrying out the full requirements contained within a unit. **Occupationally knowledgeable** means possessing relevant knowledge and understanding.

Enquiries, Appeals and Adjustments

Adjustments to standard assessment arrangements are made on the individual needs of candidates. ProQual's Reasonable Adjustments Policy and Special Consideration Policy sets out the steps to follow when implementing reasonable adjustments and special considerations and the service that ProQual provides for some of these arrangements.

Centres should contact ProQual for further information or queries about the contents of the policy.

All enquiries relating to assessment or other decisions should be dealt with by centres, with reference to ProQual's Enquiries and Appeals Procedures.

Units – Learning Outcomes and Assessment Criteria

Title:		Working in a Salon Environment		Level:		2	
Unit Number:		K/651/2430		TQT:		20	
				GLH:		10	
Learning Outcomes <i>The learner will be able to:</i>				Assessment Criteria <i>The learner can:</i>			
1	Understand health and safety requirements as a hair or beauty professional.	1.1	Describe the requirements placed on hair professionals by: <ul style="list-style-type: none"> • The Health and Safety at Work Act. • Control of Substances Hazardous to Health (COSHH). • Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR). • Local Authority regulations. 				
		1.2	Identify common hazards found within the salon environment.				
		1.3	Explain how common hazards found within the salon environment can be controlled.				
		1.4	Explain the importance of: <ul style="list-style-type: none"> • Personal hygiene. • Personal presentation. • Personal Protective Equipment (PPE). 				
		1.5	Explain how a professional's physical and psychological wellbeing can impact on their ability to provide a service safely.				
		1.6	State the causes and risks of microbial contamination.				

1	Continued	1.7	<p>Explain how hard surface disinfectants are used to control and prevent infection, including:</p> <ul style="list-style-type: none"> • Their chemical compositions. • The risks associated with using them. • How contact times impact their effectiveness.
		1.8	<p>Explain how skin disinfectants are used to control and prevent infection, including:</p> <ul style="list-style-type: none"> • Their chemical compositions. • The risks associated with using them. • Their impact on the skin's pH and barrier function. • How contact times impact the effectiveness.
		1.9	<p>Explain the causes and hazards of accidental exposure to clinical waste and how to respond.</p>
		1.10	<p>Explain how safe positioning techniques and working practices can prevent work related injury and ill health.</p>
		1.11	<p>Explain the importance of ensuring the work environment is line with legislative requirements, including:</p> <ul style="list-style-type: none"> • Lighting and illumination. • Heating. • Ventilation. • Fixtures, fittings and equipment. • Facilities and amenities. • Audit and accountability.
		1.12	<p>Describe the purpose of insurance and indemnity for a hair professional.</p>

1	<i>Continued</i>	1.13	<p>Explain why it is important to adhere to legislative, organisational and manufacturer safety instructions for equipment, materials and products, including:</p> <ul style="list-style-type: none"> • Storage. • Handling. • Usage. • Disposal. • Record keeping.
		1.14	<p>Explain why it is important to ensure that all products sourced are for cosmetic use.</p>
		1.15	<p>Describe the purpose of carrying out tests prior to procedures, and how and when to carry out these tests.</p>
2	Understand how to contribute to the development of effective work relations within a salon environment.	2.1	<p>Describe how to find out:</p> <ul style="list-style-type: none"> • Information about own job role, responsibilities and expected standards. • Information about other people's areas of responsibility.
		2.2	<p>Explain why it is important to work within own job responsibilities and the possible consequences of not doing so.</p>
		2.3	<p>Explain how to identify own strengths and weakness.</p>
		2.4	<p>Explain why it is important to be a reflective practitioner.</p>
		2.5	<p>Explain the importance of meeting own personal development and productivity targets and timescales.</p>
		2.6	<p>Explain the importance of continuous professional development, and how this affects own job role.</p>

2	Continued	2.7	Describe what a National Occupational Standard is, and how it can be used to identify training needs.
		2.8	Explain ways of maintaining awareness of current and emerging trends and developments within the Hair industry.
		2.9	Explain how the following can be used as opportunities to learn: <ul style="list-style-type: none"> • Conversations with colleagues. • Training and development activities. • Organisational activities.
		2.10	Explain why harmonious working relationships are important.
		2.11	Describe how to react positively to reviews and feedback, and why it is important.
		2.12	Explain how to support co-operative ways of working.
		2.13	Describe ways to make sure time is managed effectively.
		2.14	State who should be reported to when difficulties working with others arise.
		2.15	Describe how to deal with relationships difficulties and conflicts when working with others.
3	Understand how to promote positive impression of self, organisation and the hair and beauty industry.	3.1	Describe the career routes within either: <ul style="list-style-type: none"> • The hair industry. • The beauty industry.
		3.2	Explain the importance of following codes of conduct as a hair or beauty professional.

3	Continued	3.3	Describe the basic employment rights and responsibilities of a hair or beauty professional, including: <ul style="list-style-type: none"> • Contracts of employment. • Working hours. • Disciplinary and grievance procedures. • Holidays. • Sickness absence and pay.
		3.4	Explain how to promote respect, equality, diversity and inclusion as hair or beauty professional, including: <ul style="list-style-type: none"> • Communication. • Confidentiality. • Discretion. • Comfort. • Modesty. • Privacy.
		3.5	Compare the effectiveness of different social channels for promoting a salon business.
		3.6	Explain how to promote environmentally sustainable practice as a hair or beauty professional, including: <ul style="list-style-type: none"> • Recycling. • Limiting the use of single use plastics. • Mindful consumption of energy and water. • Choosing environmentally friendly products.
3	Continued	3.7	Explain ways of supporting the mental health and wellbeing of self and client.
		3.8	Describe the role and function of the front of house or reception area in a hair or beauty business, including: <ul style="list-style-type: none"> • Services. • Bookings. • Payments. • Retail. • Upselling. • Sales.

Additional Assessment Information

This unit is knowledge based. This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Centres may use the appropriate ProQual Candidate Workbook, or their own, centre devised, assignments.

This unit is a **common unit**. Centres should be aware that candidates may have completed this unit as part of another ProQual Hair and Beauty qualification and may be eligible for recognition of prior learning.

Title:		Employment Rights and Responsibilities		Level:		2	
Unit Number:		J/651/5248		TQT:		20	
				GLH:		10	
Learning Outcomes				Assessment Criteria			
<i>The learner will be able to:</i>				<i>The learner can:</i>			
1	Understand the employee and employer statutory responsibilities and rights.	1.1	Explain the rights and responsibilities of an employee, in terms of: <ul style="list-style-type: none"> • Contract of employment. • Equality and diversity. • Safeguarding. • Working hours. • Holiday entitlement. • Sick pay. • Maternity and paternity pay. • Data protection. 				
		1.2	Explain the rights and responsibilities of an employer, in terms of: <ul style="list-style-type: none"> • Contract of employment. • Equality and diversity. • Safeguarding. • Working hours. • Holiday entitlement. • Sick pay. • Maternity and paternity pay. • Data protection. 				
		1.3	Identify key legislation relating to health and safety at work.				
		1.4	Describe the responsibility placed employees and employers by health and safety legislation.				

2	Understand organisational procedures and documentation.	2.1	Identify the key components of contract of employment.
		2.2	Explain why it is important for employees to have an accurate and up-to-date job description.
		2.3	Identify the key information found on a payslip.
		2.4	Explain why it is important for an organisation to have agreed policies and procedures.
3	Understand the range of sources of information and advice available.	3.1	Identify different sources of information and advice covering employment responsibilities and rights.
		3.2	Describe how to obtain information and advice about employment responsibilities and rights.

Additional Assessment Information

This unit is knowledge based. This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Centres may use the appropriate ProQual Candidate Workbook, or their own, centre devised, assignments.

Title:	Winning and Retaining Customers		Level:	2
Unit Number:	T/651/4992	TQT:	100	GLH: 80
Learning Outcomes <i>The learner will be able to:</i>		Assessment Criteria <i>The learner can:</i>		
1	Understand the market and customer needs.	1.1	Describe how to identify the position of a business within the market.	
		1.2	Identify the types of customer information that can be used to tailor products and services effectively.	
		1.3	Explain how to segment customers based on their needs and value to the business.	
		1.4	Identify key information a business should know about its competitors.	
		1.5	Identify effective ways to communicate information to current and potential customers.	
2	Understand how business infrastructure supports customer engagement.	2.1	Explain the impact of business infrastructure on customer service quality.	
		2.2	Describe what is meant by customer relationship management.	
		2.3	Identify technology used to: <ul style="list-style-type: none"> • Manage communication with customers. • Manage customer billing. • Facilitate customer relationship management. 	
3	Understand how customer feedback and experience contribute to retention.	3.1	Explain how to build relationships with customers.	
		3.2	Identify methods to enhance customer experience when interacting with a business.	
		3.3	Describe a range of services, benefits, and rewards that encourage customer loyalty.	
		3.4	Identify the different types of customer feedback.	
		3.5	Describe methods for gathering customer feedback.	

3	<i>Continued</i>	3.6	Explain the importance of taking action based on customer feedback.
		3.7	Explain the importance of regularly reviewing products and services.
		3.8	Identify strategies to improve customer retention and satisfaction.

Additional Assessment Information

This unit is **knowledge based**. This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Centres may use the appropriate ProQual Candidate Workbook, or their own, centre devised, assignments.

Title:	Managing Brand Identity and Reputation		Level:	2
Unit Number:	J/651/5012	TQT:	80	GLH: 60
Learning Outcomes <i>The learner will be able to:</i>		Assessment Criteria <i>The learner can:</i>		
1	Understand methods for promoting brand identity.	1.1	Define the term "brand identity".	
		1.2	Explain the role of brand identity in business success.	
		1.3	Describe the range of methods available to promote brand characteristics.	
		1.4	Identify the advantages and disadvantages of using the following methods to promote brand characteristics: <ul style="list-style-type: none"> • Advertising. • Sponsorships. • Influencer marketing. • Content marketing. 	
		1.5	Explain how branding principles and methods are used to build and maintain corporate reputation.	
		1.6	Describe the role of brand identity in marketing organisational products and services.	
		1.7	Explain the importance of maintaining brand positioning to maximise return on investment (ROI).	
		1.8	Describe the contents of brand guidelines and their role in protecting the brand.	
2	Understand how to maintain brand consistency and employee engagement.	2.1	Explain why staff behaviour needs to align with brand characteristics and values.	
		2.2	Describe strategies to ensure all employees understand and uphold the brand's identity.	
		2.3	Explain how internal communication and training can support brand consistency.	
		2.4	Describe how to develop criteria to monitor and evaluate the success of brand identity and reputation.	

3	Understand how to assess and mitigate risks to brand reputation.	3.1	Identify the key risks to a brand and corporate reputation.
		3.2	Describe ways to mitigate risks to a brand and corporate reputation and when to use them.
		3.3	Identify sources of valid and reliable information on brand perception.
		3.4	Describe methods for tracking and assessing brand perception.
		3.5	Explain how to assess the validity and reliability of customer perception data.
		3.6	Describe the difference between customer demands, expectations, satisfaction, and loyalty.
4	Understand how to monitor and improve brand identity and reputation.	4.1	Describe the methods used to monitor brand success against agreed criteria.
		4.2	Explain how brand monitoring outcomes can inform future brand development.
		4.3	Identify legal, regulatory, and ethical requirements, as well as codes of practice, related to brand identity and corporate reputation.

Additional Assessment Information

This unit is **knowledge based**. This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Centres may use the appropriate ProQual Candidate Workbook, or their own, centre devised, assignments.

Title:	Understanding Business Structures		Level:	2
Unit Number:	T/651/5161	TQT:	70	GLH: 50
Learning Outcomes <i>The learner will be able to:</i>		Assessment Criteria <i>The learner can:</i>		
1	Understand legal business structures.	1.1	Describe the different legal structures available for businesses, including: <ul style="list-style-type: none"> • Sole trader. • Partnership. • Limited liability partnership (LLP). • Limited company (Ltd). • Private limited company (PLC). • Right-to-manage (RTM) company. • Community interest company (CIC). 	
		1.2	Describe the type of documentation required for each business structure.	
		1.3	Explain which authorities must be notified when setting up a business.	
2	Understand financial and tax implications of different business structures.	2.1	Explain the tax and National Insurance requirements for different business structures and how they are paid.	
		2.2	Describe how different legal structures affect relationships with customers and suppliers.	
		2.3	Identify who makes management decisions in different types of businesses.	
		2.4	Outline the types of records and accounts required for different business structures.	
		2.5	Compare the financial liabilities of different business structures.	
		2.6	Explain how different business structures affect tax obligations and financial risks.	

Additional Assessment Information

This unit is **knowledge based**. This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Centres may use the appropriate ProQual Candidate Workbook, or their own, centre devised, assignments.

Title:	Social Media for Business	Level:	2
Unit Number:	Y/651/4993	TQT:	80
		GLH:	70
Learning Outcomes <i>The learner will be able to:</i>		Assessment Criteria <i>The learner can:</i>	
1	Understand the of social media in business marketing.	1.1	Define the term "social media".
		1.2	Identify the benefits of using social media for business.
		1.3	Identify the different social media platforms and their key features.
		1.4	Compare the advantages and disadvantages of various social media platforms for different business purposes.
		1.5	Describe the impact of social media on customer communication and business reputation.
		1.6	Describe common risks and challenges associated with using social media for business, including: <ul style="list-style-type: none"> • Data security. • Negative feedback. • Reputational damage.
2	Understand how to develop a social media strategy for business.	2.1	Identify the key components of a social media strategy.
		2.2	Identify business goals that can be supported through social media.
		2.3	Describe how to define a target audience for social media marketing.
		2.4	Explain how to create engaging content.
		2.5	Describe different types of social media content, including: <ul style="list-style-type: none"> • Images. • Videos. • Blogs. • Live streams.

2	<i>Continued</i>	2.6	Explain how to schedule and plan social media posts for consistency and effectiveness.
		2.7	Identify tools and platforms that assist in managing social media campaigns.
3	Understand how to measure the effectiveness of social media in business.	3.1	Describe key performance indicators (KPIs) used to measure social media success, including: <ul style="list-style-type: none"> • Engagement rates. • Reach. • Impressions. • Conversions.
		3.2	Explain how to use social media analytics tools to track performance.
		3.3	Describe how customer feedback and engagement on social media can be used to improve business strategies.
		3.4	Explain how to adjust a social media strategy based on performance data and insights.
		3.5	Identify ethical and legal considerations when using social media for business, including: <ul style="list-style-type: none"> • Data protection. • Copyright. • Advertising regulations.

Additional Assessment Information

This unit is **knowledge based**. This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Centres may use the appropriate ProQual Candidate Workbook, or their own, centre devised, assignments.

Title:	SEO for Business		Level:	2	
Unit Number:	F/651/4996	TQT:	80	GLH:	70
Learning Outcomes <i>The learner will be able to:</i>		Assessment Criteria <i>The learner can:</i>			
1	Understand the principles of SEO, and its role in business.	1.1	Define the term "SEO".		
		1.2	Explain the importance of SEO for business.		
		1.3	Describe how search engines work and how they rank websites.		
		1.4	Explain the key differences between organic search results and paid advertising (PPC).		
		1.5	Identify the main benefits of effective SEO.		
		1.6	Explain the challenges and limitations of SEO.		
2	Understand the key components of SEO.	2.1	Explain the importance of keywords in SEO.		
		2.2	Describe how to conduct keyword research and select relevant keywords for a business.		
		2.3	Explain the role of on-page SEO, including: <ul style="list-style-type: none"> • Optimised titles and meta descriptions. • Header tags. • Internal linking. • Image optimisation. 		
		2.4	Explain the role of off-page SEO, including: <ul style="list-style-type: none"> • Backlinks and link-building strategies. • Social media signals. • Guest posting and collaborations. 		
		2.5	Describe the importance of technical SEO, including: <ul style="list-style-type: none"> • Website speed and mobile-friendliness. • Secure website protocols (HTTPS). • XML sitemaps and structured data. 		
		2.6	Explain how local SEO helps businesses target local customers and improve visibility in search results.		

3	Understand how to monitor and improve SEO performance.	3.1	Describe key SEO performance metrics, including: <ul style="list-style-type: none"> Organic traffic. Click-through rates. Bounce rates. Domain authority.
		3.2	Describe how to use SEO tools to track website performance.
		3.3	Explain how to analyse SEO reports and identify areas for improvement.
		3.4	Describe how businesses can adapt their SEO strategies based on performance data.
		3.5	Explain ethical SEO practices and the risks of black-hat SEO tactics, including: <ul style="list-style-type: none"> Keyword stuffing. Cloaking. Link farming.

Additional Assessment Information

This unit is **knowledge based**. This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Centres may use the appropriate ProQual Candidate Workbook, or their own, centre devised, assignments.

Title:	Selling Products and Services Face to Face			Level:	2
Unit Number:	A/651/5064	TQT:	100	GLH:	80
Learning Outcomes <i>The learner will be able to:</i>		Assessment Criteria <i>The learner can:</i>			
1	Understand the legal, regulatory and ethical considerations for face-to-face sales.	1.1	Explain the current legal, regulatory, and ethical constraints that impact face-to-face sales activities.		
		1.2	Identify the health, safety, and security requirements for various face-to-face sales environments.		
		1.3	Describe common policies, procedures, and best practices for face-to-face sales.		
2	Understand selling strategies and techniques.	2.1	Explain how to develop a sales call plan and other communication methods with customers.		
		2.2	Compare proactive and reactive selling techniques and their applications.		
		2.3	Describe techniques for cross-selling, up-selling, and selling add-ons.		
		2.4	Explain methods for assessing minimum and maximum potential sales returns.		
		2.5	Describe how to prioritise leads based on their potential value and likelihood of sales closure.		
		2.6	Identify unique selling points (USPs) and key differentiators and explain how to emphasise them.		
		2.7	Explain how to overcome sales challenges and reach solutions for customer concerns.		
		2.8	Describe techniques for handling customer objections and responding to queries effectively.		

3	Understand customer buying behaviours and how to close sales.	3.1	Describe different customer buying behaviours and strategies for managing them.
		3.2	Explain techniques for successfully closing sales at various stages of the sales process.
		3.3	Identify the methods and processes for collecting and recording sales leads information.
		3.4	Explain how to evaluate and measure the effectiveness of face-to-face sales techniques, approaches, and environments.
4	Understand organisational sales process and customer engagement strategy.	4.1	Explain the organisation's objectives and strategies for customer interactions in face-to-face sales.
		4.2	Describe the organisation's range of products, services, and recent market developments.
		4.3	Produce a plan for how structure and progress a sales interaction with a customer.
		4.4	Identify relevant sales materials and messaging techniques for engaging customers.

Additional Assessment Information

This unit is **knowledge based**. This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Learning outcome four asks candidates to put their knowledge within the context of an organisation. This may be their current employer, an organisation they volunteer with, an organisation they know well, or a fictional organisation provided to them via a case study or simulated assignment. Where a fictional organisation is used for context, this should be provided by the centre and not generated by the candidate.

Centres may use the appropriate ProQual Candidate Workbook, or their own, centre devised, assignments.

Title:	Principles and Practice of Financial Records for Business			Level:	2
Unit Number:	Y/651/5162	TQT:	120	GLH:	100
Learning Outcomes <i>The learner will be able to:</i>		Assessment Criteria <i>The learner can:</i>			
1	Understand the financial records required for business activities.	1.1	Identify the key financial records required for business activities.		
		1.2	Describe the types of records related to business assets and funds		
		1.3	Explain how to produce financial records, including: <ul style="list-style-type: none"> • Ledgers. • Journals. • Invoices. • Receipts. • Payment records. 		
		1.4	Describe how financial records help monitor the financial health of a business.		
2	Understand financial transactions and statements.	2.1	Explain the financial statements and statutory returns required for different business structures.		
		2.2	Explain how to monitor budgets, invoicing, payments, and receipts.		
		2.3	Define different accounting periods, including the financial year and tax year.		
		2.4	Explain how to choose appropriate accounting periods for business needs.		
3	Understand financial forecasting and monitoring.	3.1	Describe how cash flow, profit and loss statements, and balance sheets relate to each other.		
		3.2	Identify key financial measures and forecasts required for business operations.		
		3.3	Explain the importance of monitoring customer payments (credit control), cash flow management, and bank transactions, including bank charges.		

3	<i>Continued</i>	3.4	Explain how to prepare and interpret: <ul style="list-style-type: none"> • Cash flow forecasts. • profit and loss statements. • balance sheets.
4	Know how to ensure security and compliance in financial record keeping.	4.1	Explain how to keep paper and electronic financial records secure from loss, damage, and theft.
		4.2	Describe the importance of using passwords, encryption, and two-step verification for electronic financial records.
5	Know how and why to access financial information and professional advice.	5.1	Identify reliable sources of information on financial record-keeping.
		5.2	Explain why it is important to seek professional and technical financial advice.

Additional Assessment Information

This unit is **knowledge based**. This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Centres may use the appropriate ProQual Candidate Workbook, or their own, centre devised, assignments.

Title:	Managing Cash Flow for Business			Level:	2
Unit Number:	A/651/5163	TQT:	100	GLH:	90
Learning Outcomes <i>The learner will be able to:</i>		Assessment Criteria <i>The learner can:</i>			
1	Understand the principles of business cash flow.	1.1	Identify the key costs and bills associated with business activities.		
		1.2	Explain how cash flow targets link to overall business financial plans.		
		1.3	Describe the requirements for forecasting cash flow.		
		1.4	Explain how to prepare cash flow statements and forecast possible high and low cash flow rates.		
2	Understand how to monitor and manage cash flow.	2.1	Explain how to monitor cash flow using daily records and bank statements.		
		2.3	Describe how to choose appropriate timescales for financial forecasts.		
		2.4	Identify the methods used to forecast business income and spending.		
		2.5	Explain how the frequency and timing of cash inflows and outflows affect cash flow.		
3	Understand how to control cash flow in business.	3.1	Explain strategies for controlling sources and uses of cash, including: <ul style="list-style-type: none"> • Moving cash between accounts. • Buying and selling stock. • Minimizing creditors and bad debtors. • Managing payments to creditors. • Paying tax. • Buying and selling assets. • Short-term sales and pricing policies. 		
		3.2	Identify factors that may affect cash flow.		

4	Understand how to address cash flow shortfalls and improve cash flow.	4.1	Explain the actions to take when cash inflows and outflows do not align.
		4.2	Describe methods to improve cash flow, such as: <ul style="list-style-type: none"> • Debt factoring and invoice discounting. • Increasing sales and profitability. • Exploring new markets. • Reducing stock orders.

Additional Assessment Information

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Title:	Principles and Practice of Business Banking			Level:	2
Unit Number:	D/651/5164	TQT:	100	GLH:	80
Learning Outcomes <i>The learner will be able to:</i>		Assessment Criteria <i>The learner can:</i>			
1	Understand business banking requirements.	1.1	Identify key banking requirements for a business.		
		1.2	Explain the different banking facilities and options important for businesses.		
		1.3	Describe how to specify and prioritise business banking needs.		
		1.4	Identify sources of information for selecting a suitable bank.		
2	Understand business banking options.	2.1	Compare different banks and types of banking, including: <ul style="list-style-type: none"> • High street banks. • Online banks. • Specialist business banks. 		
		2.2	Describe the different types of business accounts available.		
		2.3	Identify the advantages and disadvantages of different types of business bank accounts.		
		2.4	Identify the legal requirements for opening and operating a business bank account.		
3	Understand how to manage business bank accounts.	3.1	Explain who is responsible for account administration and access.		
		3.2	Describe the process of depositing money into a business account.		
		3.3	Explain the process for making withdrawals, including ordering change if required.		
		3.4	Describe how to reconcile bank statements with accounting records.		

4	Understand how to ensure security when banking for business.	4.1	Explain how to protect business account information and online banking security.
		4.2	Describe why it is important to store banking records securely.
5	Understand the importance of reviewing business banking arrangements.	5.1	Explain the importance of regularly reviewing banking arrangements.
		5.2	Describe the process of switching to a different account type or bank.

Additional Assessment Information

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Appendix One – Command Verb Definitions

The table below explains what is expected from each **command verb** used in an assessment objective. Not all verbs are used in this specification

Apply	Use existing knowledge or skills in a new or different context.
Analyse	Break a larger subject into smaller parts, examine them in detail and show how these parts are related to each other. This may be supported by reference to current research or theories.
Classify	Organise information according to specific criteria.
Compare	Examine subjects in detail, giving the similarities and differences.
Critically Compare	As with compare, but extended to include pros and cons of the subject. There may or may not be a conclusion or recommendation as appropriate.
Describe	Provide detailed, factual information about a subject.
Discuss	Give a detailed account of a subject, including a range of contrasting views and opinions.
Explain	As with describe, but extended to include causation and reasoning.
Identify	Select or ascertain appropriate information and details from a broader range of information or data.
Interpret	Use information or data to clarify or explain something.
Produce	Make or create something.
State	Give short, factual information about something.
Specify	State a fact or requirement clearly and in precise detail.



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