



Level 2 Certificate in

Property: Sale of Residential Property

Qualification Specification

Qualification Recognition Number: 600/0990/1

ABBE Qualification Code: CertSORPL211

April 2019

Why this document is being revised

This document has been revised by ABBE in April 2019. A summary of the changes made to this document is, as follows:

- New address added to 1.4

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1. ABBE

1.1 Introduction

ABBE, the Awarding Body for Building Education is a forward thinking organisation that offers a range of apprenticeships,

ABBE is regulated by Ofqual for the delivery of a range of qualifications. Our qualifications are nationally recognised helping learners to achieve their full potential and ambitions.

The full range of qualifications can be found on our website <http://www.abbeqa.co.uk>

1.2 Mission Statement

Our Values - Quality through Standards: Our aim is to provide a high quality experience by building a strong community of mutual support and trust. We can use our collective talents to build meaningful partnerships to help us all to achieve our goals. ABBE is a recognised Awarding Organisation with strong professional integrity.

Our Vision: Is that every learner is confident, successful and has the opportunity to achieve their full potential.

Our Mission: ABBE Educates, inspires and empowers learners

1.3 Qualification Specification

This is the ABBE Qualification Specification for the ABBE Level 2 Certificate in Property: Sale of Residential Property. The aim of this specification is to provide learners and centres with information about the content of this qualification.

This specification is a live document and, as such, will be updated when required.

Additional qualification details are available for ABBE approved centres in the ABBE qualification handbook.

1.4 Enquiries

Any enquiries relating to this qualification should be addressed to:

ABBE
Birmingham City University
University House
15 Bartholomew Row
Birmingham
B5 5JU

Telephone: 0121 331 5174
Email: abbeenquiries@bcu.ac.uk
Website: www.abbeqa.co.uk



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2. Qualification Information

2.1 Qualification Purpose

The ABBE Level 2 Certificate in Property: Sale of Residential Property has been developed to enable those working in support roles in a residential sales environment to take a qualification which not only recognises their current skills and knowledge but also provides an opportunity for these to be developed further.

The purpose of the qualification is to confirm occupational competence.

2.2 Who could take this Qualification?

In order to take the qualification, learners must already be working in a residential sales environment but it is suitable for those with limited experience, to prepare them for working in this sector, or for more experienced workers to recognise their existing abilities.

This qualification can be taken as professional development for those interested in specialising in this area.

2.3 Qualification Number

ABBE Level 2 Certificate in Property: Sale of Residential Property: 600/0990/1

2.4 Qualification Level

This qualification has been listed on the Regulated Qualifications Framework (RQF) at: Level 2

2.5 Total Qualification Time

This qualification is allocated Total Qualification Time (TQT) this includes Guided Learning (GL) expressed in hours, which indicates the number of hours of supervised or directed study time and assessment. Credit has also been allocated to this qualification.

- The Total Qualification Time (TQT) for this qualification is: 180
- Guided Learning (GL) for this qualification is: 81
- Credit Value: 18 credits

2.6 Progression

This qualification has been designed to encourage participation in education and training in other related areas by:

- enabling estate agency employees to demonstrate the skills and knowledge that they have gained through their employment enabling learners to achieve a nationally recognised qualification
- providing a template for 'best practice' for new entrants to residential estate agency as a guide for their learning and development

The Level 2 Certificate in Property: Sale of Residential Property forms part of a wider suite of property related qualifications including the:

- ABBE Level 3 Diploma in Property: Sale of Residential Property
- ABBE Level 2 Certificate in Property: Residential Property Lettings and Management
- ABBE Level 3 Diploma in Property: Residential Property Lettings and Management



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All of these qualifications have been structured in such a way as to allow easy transfer between them to encourage learners to continue developing.

2.7 Age ranges

Pre 16	No
16-18	Yes
18+	Yes
19+	Yes

2.8 Structure of the Qualification

To achieve the ABBE Level 2 Certificate in Property: Sale of Residential Property learners must achieve the seven mandatory units plus 3 credits from the optional units.

Where a learner is following an apprenticeship programme they must also complete sufficient credits from the additional units; 4 credits from Group A and 11 credits from Group B.

Mandatory Units			
URN	Unit Name	Credit Value	Level
M/600/2775	Reduce risks to health and safety in the workplace	3	2
T/601/2949	Understanding professional conduct in a property environment	1	2
M/601/2965	Know the legislation, guidelines, codes of practice and statutory information in residential sales	3	2
J/601/2972	Maintain the security of individuals and property in a property environment	2	2
R/601/2988	Progress customer enquiries associated with property services	2	2
R/601/2991	Maintain displays of marketing materials for properties	2	2
D/601/3111	Organise and progress viewings of properties	2	2
Optional Units			
F/601/3053	Organise market appraisals of properties	3	2
J/601/3121	Conduct accompanied viewings of properties	3	2
J/601/3166	Hand-over new properties to buyers	3	2
Additional Units Apprenticeships Only - Group A (4 credits)			
R/600/6351	Develop yourself in the job role	2	2
A/502/7524	Employment rights and responsibilities in the facilities management, housing and property sectors	2	2
Additional Units Apprenticeships Only - Group B (a minimum of 11 credits)			
A/601/1219	Deal with customers across a language divide	8	2
F/601/1223	Deal with incoming telephone calls from customers	5	2
J/601/1224	Make telephone calls to customers	6	2
A/601/1222	Use questioning techniques when delivering customer service	4	2
L/601/1225	Deal with customers using bespoke software	5	2



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2.9 Barred Units

Units with the same title at different levels or units with the same content cannot be combined in the same qualification.

2.10 Language

ABBE qualifications and assessment materials will be provided through the medium of English.

2.11 Grading

This qualification is: Pass/Fail

2.12 Pre-course Procedures

This qualification is available to anyone who is capable of reaching the required standards. They have been developed free from any barriers that unfairly restrict access or progression thereby promoting equal opportunities.

There are no pre-entry requirements for this qualification.

2.13 Qualification Review Boards

Qualification Review Boards (QRBs) are set up for each qualification. The Boards are drawn from employers, centres, Higher Educational Institutes (HEIs) and others with a vested interest in the sector in which the qualification is used. The purpose of the QRB is to ensure that the content of the qualification and the proposed assessment methodology are fit for purpose and are appropriate to meet the requirements of the sector.

QRBs are ongoing and will be scheduled for specific points within the qualification lifetime; at the notional mid-point and again towards the review date of the qualification. During this process, the QRB will consider any feedback received on the performance of the qualification and will consider if the content, structure, purpose and assessment methodology remain appropriate to the needs of the sector. This will help to improve both our qualification and the specification.



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3. Qualification Unit(s)*

Unit 1: Reduce risks to health and safety in the workplace

Unit Reference Number: M/600/2775

Level: 2

Credit: 3

Unit Summary

This unit is about reducing risks to health and safety in the workplace. It is about appreciating significant risks in the workplace and knowing how to identify and deal with them.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know about their organisation's health and safety procedures	1.1 Describe their responsibilities and legal duties for health and safety in the workplace
	1.2 Identify responsibilities and legal duties for health and safety specific to their own job role
	1.3 Name and locate the person responsible for health and safety in their area of work
	1.4 Describe where and when to get additional health and safety assistance
	1.5 Give reasons why it is important to follow manufacturer's instructions for the safe use of equipment materials and products
2. Know how to identify the hazards in the workplace	2.1 Define the term 'hazard'
	2.2 Give examples of hazards which could exist in the workplace and the safe working practices which should be followed and identify those specific to their own job role
	2.3 Give reasons why it is important to remain alert to the presence of hazards in the whole workplace
	2.4 Describe why personal presentation and behaviour is important in maintaining health and safety in the workplace
3. Know how to evaluate risks in the workplace	3.1 Define the term 'risk'
	3.2 Give reasons why they should deal with or report risks
	3.3 Describe procedures for reporting risks which they are unable to deal with



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	3.4 Describe the risks to the environment which may be present in the workplace and their own job
4. Be able to identify the hazards and risks in the workplace	4.1 Select the workplace instructions relevant to the job
	4.2 Identify aspects of the workplace which could pose a danger to themselves or others
	4.3 Give examples of working practices in the job which could pose a danger to people in the workplace
	4.4 Assess which aspects of the workplace and working practices pose the highest risk and report them to the relevant person
	4.5 Deal with hazards in accordance with instructions and legal requirements
5. Be able to reduce the risks to health and safety in the workplace	5.1 Perform duties in accordance with workplace instructions, manufacturer's instructions and legal requirements
	5.2 Use equipment materials and products safely and in accordance with instructions
	5.3 Use relevant equipment to control risks to health and safety
	5.4 Make suggestions on how to reduce risks to health and safety in the workplace to the relevant person
	5.5 Describe any differences between workplace instructions and manufacturer's instructions and report these to the relevant person
	5.6 Describe how their personal presentation and behaviour at work could cause risks to the health and safety of him/herself and others



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Unit 2: Understanding professional conduct in a property environment

Unit Reference Number: T/601/2949

Level: 2

Credit: 1

Unit Summary

This unit is about presenting a professional image when working in a property environment. It includes providing information in a way which promotes understanding.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand how to present a positive image in a property environment	1.1 Describe the standards of appearance and conduct which should be maintained in a property environment
	1.2 Explain why it is important to maintain standards of appearance and conduct in a property environment
2. Understand the importance of communicating information clearly	2.1 Explain why it is important to explain technical terms and abbreviations when providing information
	2.2 Explain why it is important to avoid jargon when providing information
	2.3 Explain the importance of checking that the recipient has understood the information given



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Unit 3: Know the legislation, guidelines, codes of practice and statutory information in residential sales

Unit Reference Number: M/601/2965

Level: 2

Credit: 3

Unit Summary

This unit is about the legislation, guidelines, codes of practice and statutory information requirements which need to be adhered to in a residential sales environment.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand legislation, guidelines and codes of practice in residential sales	1.1 List the legislation, guidelines and codes of practice relevant to the: <ul style="list-style-type: none">• security of individuals• security of property• providing information to buyers and sellers• production of marketing materials for residential properties for sale• erection of boards• organising market appraisals• undertaking market appraisals• advising sellers on the presentation of properties• obtaining instructions• agreeing marketing activities• implementation of marketing activities• contacting prospective buyers and sellers• describing properties• arranging and conducting visits of property areas• organising viewings of properties• progressing viewings of properties• conducting viewings of properties for sale• qualifying prospective buyers• progressing residential sales• money laundering• provision of after-sales service



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	<p>1.2 Explain how legislation, guidelines and codes of practice impact on:</p> <ul style="list-style-type: none"> • security of individuals • security of property • providing information to buyers and sellers • production of marketing materials for residential properties for sale • erection of boards • organising market appraisals • undertaking market appraisals • advising sellers on the presentation of properties • obtaining instructions • agreeing marketing activities • implementation of marketing activities • contacting prospective buyers and sellers • describing properties • arranging and conducting visits of property areas • organising viewings of properties • progressing viewings of properties • conducting viewings of properties for sale • qualifying prospective buyers • progressing residential sales • money laundering • provision of after-sales service
<p>2. Understand statutory information in residential sales</p>	<p>2.1 Describe why it is important to comply with statutory information requirements for properties for sale</p>



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Unit 4: Maintain the security of individuals and property in a property environment

Unit Reference Number: J/601/2972

Level: 2

Credit: 2

Unit Summary

This unit is about contributing to the maintenance of the security of yourself, colleagues, customers and property, covering both personal property and properties available through the organisation. It includes identifying possible risks to security and applying appropriate security procedures at all times both in the office and when offsite at properties.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to maintain the security of self and others	1.1 State the main types of risks within the working environment and when visiting properties and development sites which may affect: <ul style="list-style-type: none">• self• colleagues• others
	1.2 Describe the organisational procedures for minimising the risks to individuals
	1.3 State the importance of monitoring the whereabouts of colleagues
	1.4 Describe what constitutes: <ul style="list-style-type: none">• unexpected circumstances• absences• departures from agreed schedules
	1.5 Describe the procedures which should be followed in the event of an emergency
2. Know how to maintain the security of information about individuals	2.1 Describe the organisational procedures for the security of information
	2.2 Give examples of types of information which may be sensitive
	2.3 State who is entitled to receive different types of information about individuals
	2.4 Describe the organisational procedures for disposing of information relating to individuals and property that is no longer required



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3. Know how to maintain the security of property	3.1 State the main types of risks to: <ul style="list-style-type: none"> • personal property • residential properties
	3.2 Describe the actions and organisational procedures appropriate to minimising the risks to: <ul style="list-style-type: none"> • personal property • residential properties
	3.3 Describe the organisational procedures for the security and logging of keys and access codes for properties
	3.4 Describe the organisational procedures and security arrangements for the handling of cash and cheque payments
4. Be able to maintain the security of self and others	4.1 Identify risks within the working environment and when visiting properties and development sites which may affect: <ul style="list-style-type: none"> • self • colleagues • others
	4.2 Apply relevant security procedures and guidelines for addressing risks to: <ul style="list-style-type: none"> • self • colleagues • others
	4.3 Provide clear and accurate information to relevant colleagues regarding own travelling arrangements and schedules when visiting properties and sites
	4.4 Follow the organisational procedures for monitoring the whereabouts of colleagues
	4.5 Respond appropriately to any unexpected circumstances, absences and departures from agreed schedules
	4.6 Follow organisational procedures in the event of an emergency
5. Be able to maintain the security of property, personal belongings and information	5.1 Identify the security risks affecting: <ul style="list-style-type: none"> • properties • personal belongings
	5.2 Apply the relevant security procedures and guidelines for protecting: <ul style="list-style-type: none"> • properties • personal belongings • valuables • money • keys and access codes
	5.3 Follow organisational procedures for reporting any security equipment which is not functioning properly



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	5.4 Follow organisational procedures for the security of information including the disposal of information which is no longer required
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Unit 5: Progress customer enquiries associated with property services

Unit Reference Number: R/601/2988

Level: 2

Credit: 2

Unit Summary

This unit is about progressing enquiries about services associated with residential property. Enquiries can be general requests for information or specific requests regarding particular services and/or properties available via the organisation. It includes providing relevant information towards addressing enquiries and checking to confirm that the information fulfils requirements.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know about the services offered by own organisation	1.1 Describe the range of services offered by the organisation
	1.2 Describe the difference between features and benefits of services offered by the organisation
2. Know the organisational procedures for dealing with enquiries	2.1 State what information can be provided to enquirers
	2.2 State what information is required to match individual's requirements to available properties
	2.3 State what information is required to advise about services which are relevant to the individual needs?
	2.4 State what types of information are available to enquirers relating to properties being marketed by the organisation
	2.5 Describe how information relating to properties being marketed by the organisation is accessed
	2.6 Describe the organisational procedures for recording information about enquiries and their outcomes
	2.7 State the importance of maintaining up to date records about enquiries
	2.8 State what actions can be taken when interest in a property is expressed?
	2.9 State the limit of own responsibility and authority for handling enquiries
	2.10 State the organisational procedures for referring on enquiries which are outside own responsibility and authority



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3. Be able to progress enquiries.	3.1 Identify which services are required by the enquirer
	3.2 Gather information from enquirers that will help to provide them with the required information and agree their preferred method of communication
	3.3 Identify marketing materials which are relevant and provide these according to organisational procedures and requirements
	3.4 Ensure that information provided is: <ul style="list-style-type: none"> • complete • relevant to the enquiry • provided by the appropriate method
	3.5 Explain to the enquirer the features and benefits of using the organisation's services
	3.6 Obtain agreement to use the organisation's services where possible
	3.7 Refer enquiries which are outside own responsibility and authority according to organisational procedures



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Unit 6: Maintain displays of marketing materials for properties

Unit Reference Number: R/601/2991

Level: 2

Credit: 2

Unit Summary

This unit is about developing and maintaining marketing materials designed to promote properties. Displays can include window displays, wall mounted displays, websites and boards. It includes ensuring that materials are up-to-date and taking the relevant actions to ensure that materials are maintained and effective.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand organisational procedures for the development of displays of marketing materials for properties	1.1 List the health and safety issues associated with different types of displays
	1.2 Describe how health and safety issues associated with displays should be addressed
	1.3 Describe organisational procedures for updating and removing boards from properties
	1.4 State the limits of own responsibility and authority for the development of displays of marketing materials
	1.5 State the organisational procedures for reporting issues that are outside own responsibility and authority when developing of displays of marketing materials
2. Know how to use displays, web-based media and boards to promote properties	2.1 State the importance of displaying marketing materials effectively
	2.2 State the advantages and disadvantages of using different types of marketing displays including: <ul style="list-style-type: none">• Wall mounted displays• Window displays• Web-based media• Boards
	2.3 State the importance of monitoring stocks of marketing materials and addressing any shortages
	2.4 List the websites and press advertising that should be used in line with organisational procedures



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	2.5 List the factors which should be considered when deciding how to display marketing materials to their best effect
3. Know how to maintain marketing materials for properties	3.1 State the importance of ensuring that: <ul style="list-style-type: none"> • Displays are complete and maintained • New and updated materials are included promptly • Outdated materials are amended • Damaged materials are discarded
	3.2 State the importance of monitoring stocks of marketing materials and addressing any shortages
	3.3 State the importance of monitoring web-based marketing materials
	3.4 Describe the procedure for amending web-based marketing materials following organisational procedures
	3.5 List factors which make marketing materials out of date
4. Be able to use marketing materials and boards to promote properties	4.1 Use marketing materials to provide a presentation of available properties which meets organisational requirements
	4.2 Ensure that boards are displayed at properties where applicable
5. Be able to maintain marketing materials for properties	5.1 Monitor displays and websites to ensure that marketing materials are accurate and up to date
	5.2 Ensure that new and updated marketing materials are included in: <ul style="list-style-type: none"> • Displays • Press • Web-based media
	5.3 Ensure that properties which no longer need to be marketed are removed from: <ul style="list-style-type: none"> • Displays • Press • Web-based media
	5.4 Monitor stocks of marketing materials and address any shortages
	5.5 Ensure that boards are updated to reflect the current status of properties
	5.6 Ensure that boards are removed from properties when they are no longer required in line with legal and organisational procedures
	5.7 Make reasoned recommendations to the relevant person about how marketing materials could be improved to enhance interest in properties



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Unit 7: Organise and progress viewings of properties

Unit Reference Number: D/601/3111

Level: 2

Credit: 2

Unit Summary

This unit is about organising the viewings of residential properties. It includes making appropriate arrangements for viewings and seeking and responding to feedback as a result of viewings. This unit is for use in either a sales or a lettings environment.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to develop relationships with prospective buyers/tenants	1.1 List the main types of buyers/tenants of residential property
	1.2 Identify factors that influence individual's decisions about properties
	1.3 Describe the organisational procedures for contacting individuals
	1.4 Outline what information can be provided to interested parties about properties
	1.5 Outline the benefits to interested parties of viewing properties
	1.6 List the range of viewing arrangements available
	1.7 Describe how to arrange viewings
	1.8 Describe types of visiting conditions and restrictions that may apply to different properties
2. Know how to follow up viewings	2.1 List factors that can affect the saleability of properties
	2.2 Describe organisational procedures for obtaining feedback following a viewing
	2.3 State what actions should be taken when interest is expressed in a property
	2.4 Maintain records of viewings in line with organisational procedures
3. Be able to organise and progress viewings	3.1 Promote the benefits of viewing properties
	3.2 Confirm the types of properties which are of interest to prospective buyers/tenants



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	3.3 Agree with the prospective buyer/tenant the: <ul style="list-style-type: none"> • properties to be viewed • type of viewings to be undertaken
	3.4 Identify viewing conditions and restrictions relating to properties to be viewed
	3.5 Ensure that appropriate steps are taken to protect the health, safety and security of those involved in the viewing
	3.6 Ensure that all relevant parties are notified of the arrangements for the viewing
4. Be able to review viewings of properties	4.1 Obtain feedback from prospective buyers/tenants following viewings
	4.2 Record feedback from viewings in line with organisational procedures
	4.3 Take action to address any problems with viewings
	4.4 Agree relevant actions towards assisting individuals to progress interest in particular properties
	4.5 Maintain records of viewings in line with organisational procedures
	4.6 Ensure that relevant colleagues are informed of viewings and their outcomes
	4.7 Comply with all relevant legislation, guidelines and codes of practice relating to viewings of properties



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Unit 8: Organise market appraisals of properties

Unit Reference Number: F/601/3053

Level: 2

Credit: 3

Unit Summary

This unit is about agreeing with customers to undertake market appraisals of their property and making the necessary arrangements. It includes liaising with customers to explain the purpose of the appraisals and with any relevant colleagues involved in progressing the appraisals.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand the procedures for negotiating tenancies	1.1 Describe the organisational procedures for drawing up tenancy agreements
	1.2 List the documents which should be signed and dated by all parties including where relevant any guarantor
	1.3 Explain the organisational procedures for dealing with inventories
	1.4 List methods of payment which are acceptable to own organisation
	1.5 Explain the organisational procedures for registering tenant deposits where applicable
2. Be able to negotiate tenancies	2.1 Negotiate and agree rent subject to the approval of the landlord
	2.2 Provisionally agree with the tenant: <ul style="list-style-type: none">• date for moving in• duration of the tenancy
	2.3 Provisionally agree any special terms which may need to be included in the tenancy agreement
	2.4 Ensure the landlord is kept fully informed of negotiations and agrees with provisional terms for the tenancy agreement
	2.5 Agree the type and terms of the tenancy with all relevant parties
	2.6 Ensure prospective tenants are aware of their rights and responsibilities in respect of the tenancy agreement
	2.7 Ensure tenants are aware of: <ul style="list-style-type: none">• initial amounts payable on signing the agreement• forms of payment accepted by the organisation



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	2.8 Draw up tenancy agreements in line with organisational procedures
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Unit 9: Conduct accompanied viewings of properties

Unit Reference Number: J/601/3121

Level: 2

Credit: 3

Unit Summary

This unit is about accompanying prospective buyers/tenants to view properties. It includes providing them with relevant information and knowledge regarding the property, and answering their questions. This unit is suitable for use in a sales or lettings environment.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to prepare for viewings	1.1 List the key features of the local property area which are of interest to prospective buyers/tenants
	1.2 List the types of marketing materials regarding the organisation's properties and how to access them
	1.3 State how to obtain information about any fixtures and fittings which are included in a property
	1.4 Describe how the following are identified: <ul style="list-style-type: none">• typical property values in the area• types of different property that are being sold/let
2. Know how to liaise with prospective buyers/tenants	2.1 List the main types of buyers/tenants of residential properties
	2.2 Identify factors that influence individual's decisions
	2.3 Outline what information can be provided to individuals about properties
	2.4 Describe types of visiting conditions and restrictions that may apply to different properties
	2.5 Give examples of typical questions asked about properties
	2.6 State how questions about properties should be addressed
	2.7 State what actions should be taken when interest is expressed in a property
3. Be able to prepare to conduct accompanied viewings	3.1 Confirm the property is still available
	3.2 Confirm arrangements for the viewing with all relevant parties



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	3.3 Obtain current marketing materials for the property to be viewed
	3.4 Identify all relevant: <ul style="list-style-type: none"> • specifications for the property • details of fixture and fittings available
	3.5 Obtain current marketing materials for the property to be viewed
	3.6 Ensure that individuals have accurate and clear directions for the property to be viewed
	3.7 Check that access to the property is available at the time of the proposed viewing
	3.8 Take action to address any problems with the viewing
4. Be able to conduct viewings of properties	4.1 Attend appointments at the agreed time and place
	4.2 Confirm with the prospective buyer/tenant: <ul style="list-style-type: none"> • own identity • identity of the prospective buyer/tenant • objectives for the viewing • proposed itinerary • their expectations
	4.3 Promote the key selling points of the property
	4.4 Provide accurate information about local services and amenities
	4.5 Check that individuals have understood information and answer questions asked if any
	4.6 Record significant comments regarding properties of interest in line with organisational procedures
	4.7 Identify properties of interest and agree actions to progress interest
	4.8 Carry out viewings in accordance with any conditions and restrictions
	4.9 Take steps to maintain health, safety and security for all parties
	4.10 Ensure that the property is secure on departure
	4.11 Maintain clear and accurate records of viewings and their outcomes
	4.12 Ensure that relevant colleagues are kept informed of viewings and their outcomes
	4.13 Comply with all relevant legislation, guidelines and codes of practice relevant to conducting accompanied viewings



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Unit 10: Hand-over new properties to buyers

Unit Reference Number: J/601/3166

Level: 3

Credit: 3

Unit Summary

This unit is about inspecting new properties during their development to ensure that specifications agreed with your customer are being fulfilled, and then completing the hand-over to the customer when the property is available. The specifications can cover the structure of the property, finishes, fixtures and fittings, furnishings and any appliances available.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Understand organisational procedures for the hand-over of new properties to buyers	1.1 Explain the organisational procedures for inspecting and handing over new properties to buyers
	1.2 Explain why it is important to obtain approvals and documented agreements from prospective buyers
	1.3 Explain the organisational procedures for recording inspections and the hand-over of new properties
	1.4 Explain the limits of own limits of responsibility and authority for the hand-over of new properties
	1.5 Explain the organisational procedures for reporting issues that are outside of own responsibility and authority when handing over new properties
2. Understand how to complete the hand-over of new properties to buyers	2.1 Explain why it is important to inspect new properties as they are being constructed and fitted out
	2.2 Explain why it is important to ensure that the new property is clean and tidy
	2.3 Explain the documentation and instruction manuals that need to be obtained prior to hand-over to the prospective buyer
	2.4 Give examples of the types of fittings and appliances which require explanation as to how they work
	2.5 Analyse the main types of queries or problems that can arise when moving into a new property
	2.6 Describe the contact procedures available to prospective buyers for dealing with queries or problems



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3. Be able to inspect new property prior to its hand-over to buyers	3.1 Identify the approved specifications for the new property as agreed with the prospective buyer
	3.2 Inspect the progress of new properties at appropriate intervals to monitor that specifications are being met
	3.3 Check that all fittings and appliances are in working order
	3.4 Address any problems with fittings and appliances promptly
	3.5 Identify any variances from agreed specifications
	3.6 Take action to address variances in the specification
	3.7 Address any problems with cleanliness or redundant materials
	3.8 Obtain all documents and instruction manuals relating to properties in preparation for hand-over to buyers
	3.9 Maintain accurate and completed records of inspections
	3.10 Ensure that access to the new property is safe
4. Be able to complete the hand-over of a new property	4.1 Follow the procedures for handing over new properties to buyers
	4.2 Identify any aspects of the specification which differ from what was agreed with the buyer
	4.3 Explain to the buyer the reasons for any differences to the specification
	4.4 Address any discrepancies to the specification
	4.5 Obtain confirmation from buyers that specifications are accepted where possible
	4.6 Explain to the buyer how fittings and appliances work
	4.7 Provide buyers with all documentation and keys to the property
	4.8 Provide buyers with details for contacting relevant people in the event of any subsequent queries or problems
	4.9 Check that buyers have understood the information provided and encourage questions
	4.10 Maintain accurate records regarding the hand-over in line with organisational procedures
	4.11 Comply with all relevant legislation, guidelines and codes of practice relating to the hand-over of new properties



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Unit 11: Develop yourself in the job role

Unit Reference Number: R/600/6351

Level: 2

Credit: 2

Unit Summary

This unit is about developing yourself in your job by identifying areas for further development and setting yourself targets for achieving this.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know how to develop him/herself in the job	1.1 Identify activities that could help with self-development
	1.2 Describe how to set targets for personal development
	1.3 State the importance of setting achievable personal development targets
	1.4 Identify the types of support available to achieve targets
	1.5 Describe the procedures for accessing support
	1.6 State the importance of reviewing and updating progress against targets
	1.7 Describe the procedures for reviewing and updating progress
	1.8 List the benefits of discussing progress with others
2. Be able to develop him/herself in the job	2.1 Identify and agree areas where they could develop further
	2.2 Agree achievable targets for personal development
	2.3 Agree the time and support required to achieve targets
	2.4 Demonstrate new skills in the workplace
	2.5 Request and use feedback on own performance from others



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Unit 12: Employment rights and responsibilities in the facilities management, housing and property sectors

Unit Reference Number: A/502/7524

Level: 2

Credit: 2

Unit Summary

Successful assessment of the unit proves that the candidate has achieved the national occupational standard to understand employment rights and responsibilities.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Know employer and employee rights, responsibilities and own organisational procedures	1.1 State employer and employee rights and responsibilities under employment law, including the Equality Act, Health & Safety and other relevant legislation
	1.2 State importance of having employment rights and responsibilities
	1.3 Describe organisational procedures for health & safety, including documentation
	1.4 Describe organisational procedures for equality & diversity, including documentation
	1.5 Identify sources of information and advice on employment rights and responsibilities
2. Know factors that affect own organisation and occupation	2.1 Describe the role played by own occupation within organisation and industry
	2.2 Describe career pathways available to them
	2.3 State types of representative body related to the industry, their main roles and responsibilities and their relevance to the industry
	2.4 Identify sources of information and advice on own industry, occupation, training and career
	2.5 Describe principles, policies and codes of practice used by own organisation and industry
	2.6 Describe issues of public concern that affect own organisation and industry



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Unit 13: Deal with customers across a language divide

Unit Reference Number: A/601/1219

Level: 2

Credit: 8

Unit Summary

Customer service is frequently delivered across a language divide. Customer service centres may be located in one country but deal mainly with another. In a multi-cultural society many customers may have a different first language from those delivering customer service to them. This language divide can present a real challenge to those who deliver customer service. This unit is about preparing to deliver customer service across a language divide and seeing through that delivery. The unit covers the steps that are needed to deal with customers with different language preferences without having full access to the learner's customer's first language. The learner should choose this unit if they frequently deal across a language divide. The learner should not choose this unit if they come across customers who do not share their first language only occasionally.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Prepare to deal with customers with a different first language	1.1 Identify the language or languages other than their own that they are most likely to come across when dealing with customers
	1.2 Learn a greeting, an expression of thanks and a farewell phrase in the language they expect to encounter
	1.3 Identify a source of assistance with a language they expect to encounter when delivering customer service
	1.4 Agree with colleagues informal signing options that may be used for key aspects of their services or products when dealing with somebody with a different first language
	1.5 Log useful words and phrases to support their dealings with a customer with a different first language
	1.6 Learn an appropriate phrase to explain to a customer in their first language that they do not speak that language fluently
2. Deal with customers who speak a different first language from their own	2.1 Identify their customer's first language and indicate to the customer that they are aware of this
	2.2 Establish the expectations of the customer regarding whether they expect to deal in the learner's first language or theirs
	2.3 Speak clearly and slowly if using a language which is not the first language for either them or their customer
	2.4 Maintain a consistent tone and volume when dealing with somebody across a language divide



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	2.5 Listen closely to their customer to identify any words they may be using in a way that differs from the way the learner would generally use the same words
	2.6 Check their understanding of specific words with their customer using questions for clarification
	2.7 Seek appropriate assistance from colleagues if they are unable to complete a customer transaction because of language barriers
	2.8 Reword a question or explanation if their customer clearly does not understand their original wording
	2.9 Use a few words of their customer's first language to create a rapport
3. Deal with customers who speak a different first language from their own	3.1 List the languages that they are most likely to encounter among groups of their customers
	3.2 State how to greet, thank and say farewell to customers in their first languages
	3.3 Explain the importance of dealing with customers in their first language if possible
	3.4 Describe how to explain to a customer that they cannot hold an extended conversation in their first language
	3.5 Explain the importance of tone, pace and volume when dealing with customers across a language divide
	3.6 Identify possible sources of assistance to use when a language barrier demands additional language skills



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Unit 14: Deal with incoming telephone calls from customers

Unit Reference Number: F/601/1223

Level: 2

Credit: 5

Unit Summary

Many organisations rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, a proportion of calls start with customers in a negative frame of mind because the caller sees making a call as a way of dealing with a customer service problem. This unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each call.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Use communication systems effectively	1.1 Operate telecommunication equipment efficiently and effectively
	1.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer
	1.3 Listen carefully when collecting information from their customer
	1.4 Select the information they need to record and store following their organisation's guidelines
	1.5 Update their customer records during or after the call to reflect the key points of the conversation
2. Establish rapport with customers who are calling	2.1 Greet their customer following their organisation's guidelines
	2.2 Listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call
	2.3 Confirm the identity of their customer following organisational guidelines
	2.4 Use effective and assertive questions to clarify their customer's requests
3. Deal effectively with customer questions and requests	3.1 Identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each
	3.2 Choose the option that is most likely to lead to customer satisfaction within the service offer
	3.3 Give clear and concise information to customers in response to questions or requests



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	3.4 Use questions and answers to control the length of the conversation
	3.5 Keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time
	3.6 Put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague
	3.7 Summarise the outcome of the call and any actions that they or their customer will take as a result
	3.8 Check before the call is finished that their customer is content that all their questions or requests have been dealt with
	3.9 Complete any follow up actions agreed during the call
	3.10 Take a clear message for a colleague if they are unable to deal with some aspect of their customer's questions or requests
	3.11 Ensure that promises to call back are kept
4. Know how to deal with incoming telephone calls from customers	4.1 Describe their organisation's guidelines and procedures for the use of telecommunication equipment
	4.2 Explain how to operate the organisation's telecommunication equipment
	4.3 Explain the importance of speaking clearly and slowly when dealing with customers by telephone
	4.4 Describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone
	4.5 Explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand
	4.6 Identify what information is important to note during or after telephone conversations with customers
	4.7 Describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers
	4.8 Explain the importance of keeping their customer informed if they are on hold during a call
	4.9 Explain the importance of not talking across an open line
	4.10 List details that should be included if taking a message for a colleague
	4.11 Describe their organisation's guidelines and procedures for taking action to follow up calls made to customers
	4.12 Describe their organisation's guidelines for handling abusive calls



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Unit 15: Make telephone calls to customers

Unit Reference Number: J/601/1224

Level: 2

Credit: 6

Unit Summary

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves some very specific actions and should not be seen as a casual activity. By making a call to a customer the learner will have the opportunity to prepare and is therefore more likely to be able to lead the conversation in the direction they want it to go. This unit is about planning and making calls to customers in a way that contributes positively to the organisation's customer service.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Plan their calls effectively	1.1 Use all appropriate customer information to plan their call
	1.2 Anticipate their customer's expectations and assemble all the information they might need before their conversation with the customer
	1.3 Identify the objective of their call and the way in which they expect the call to end
	1.4 Plan the opening part of their conversation with their customer and anticipate possible responses
2. Use communication systems effectively	2.1 Operate telecommunication equipment efficiently and effectively
	2.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer
	2.3 Listen carefully when collecting information from their customer
	2.4 Select the information they need to record and store following their organisation's guidelines
	2.5 Update their customer records during or after the call to reflect the key points of the conversation
3. Make focussed calls to their customer	3.1 Open the conversation positively and establish a rapport with their customer
	3.2 Confirm the identity of their customer following organisational guidelines
	3.3 Ensure that their customer is aware of the purpose of their call as early as possible



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	3.4 Respond positively to queries and objections from their customer
	3.5 Summarise the outcome of the call and any actions that they or their customer will take as a result
	3.6 Complete any follow up actions agreed during the call



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Unit 16: Use questioning techniques when delivering customer service

Unit Reference Number: A/601/1222

Level: 2

Credit: 4

Unit Summary

This unit is about how the learner uses questioning both in planned sequences and in spontaneous conversation to paint a picture of what their customer wants and how the learner's organisation can deliver it. This unit is for a learner who comes into contact with their customer face to face, by voice technology or on-line with immediate interaction. This unit is probably not for a learner who deals with customers remotely when it takes time to exchange questions and responses.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Establish rapport and identify customer concerns	1.1 Greet their customer sincerely and invite a full and open response
	1.2 Use planned or spontaneous lines to indicate to their customer that they empathise with their initial enquiry
	1.3 Invite more detailed explanation from their customer
	1.4 Listen closely to their customer's responses to strengthen their understanding of customer concerns
	1.5 Use both open and closed questions to make appropriate connection with their customer and open the door to more detailed investigation
	1.6 Identify and note their customer's feelings and mood in relation to the information they are seeking
2. Seek detailed information from customers using questioning techniques	2.1 Follow a planned trail of questions to explore in detail customer concerns they have already identified
	2.2 Hold a spontaneous conversation with their customer to explore in detail customer concerns they have already identified
	2.3 Explain to their customer why they need the information they are asking for
	2.4 Use probing and searching questions that draw on comments or words used by their customer
	2.5 Thank their customer for the information in a way that encourages further open responses
	2.6 Use pre-planned routing and trigger questions that lead their customer to respond in new areas



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	2.7 Follow organisational procedures to record customer responses to inform future actions
3. Understand how to use questioning techniques when delivering customer service	3.1 Explain why establishing rapport makes it easier to draw information from customers
	3.2 Describe ways to greet customers that immediately build rapport
	3.3 Explain reasons for using planned question patterns to draw out particular information
	3.4 Explain reasons for using spontaneous conversation to draw out particular information
	3.5 Explain the importance of active listening when seeking detailed information from customers
	3.6 Identify the differences between and uses of closed and open questions
	3.7 Describe the importance of explaining to customers why information is needed
	3.8 Explain why particular trigger questions are effective in gaining specific information



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Unit 17: Deal with customers using bespoke software

Unit Reference Number: L/601/1225

Level: 2

Credit: 5

Unit Summary

Customer service is often delivered using bespoke software when dealing with customers face-to-face, by telephone or on-line. For the process to be effective, the learner must be able to navigate the system quickly and directly following recommended routes and using all the functionality of the system. Customers are unaware of the details of the system they are using and they must be kept informed of the different steps the learner is taking. The use of the system must also ensure that the learner keeps appropriate records of the transaction so that it can proceed successfully through the next stages. Most of all, customer satisfaction must drive the interaction and it should not appear to be dominated by the demands of the software. This unit is for a learner who is responsible for delivering service to customers at the same time as operating bespoke service software.

Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

Learning Outcome The learner will:	Assessment Criterion The learner can:
1. Prepare to deliver customer service using bespoke software	1.1 Sign on and open access to appropriate functions in the IT system
	1.2 Navigate the architecture and geography of the customer service site to ensure they can access all appropriate areas
	1.3 Explore screen or menu routes that are most appropriate for the customer service they are seeking to deliver
	1.4 Ensure that they are familiar with the software manual, help screens or help lines to know where to locate technical support when needed
	1.5 Prepare their work area to deliver customer service using bespoke software
2. Deliver customer service using bespoke software	2.1 Identify their customer or the services or products they wish to access
	2.2 Follow organisational procedures to step through the system in a way that responds to their customer's needs
	2.3 Use search or other specialist functions within the software to respond to customer requests
	2.4 Enter new records using the bespoke software system
	2.5 Amend customer service records in the bespoke software system



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	2.6 Communicate with their customers in terms they can understand relating to the software system
	2.7 Follow organisational procedures to lead the conversation in a way that makes it easy to follow the paths and sequences of the bespoke software
	2.8 Interpret error messages and act on them to support their customer service
	2.9 Refer their customer to a colleague following organisational procedures if they are unable to complete the transaction
3. Understand how to deal with customers using bespoke software	3.1 Describe access and sign-on routines for the bespoke software system
	3.2 Describe the architecture and geography of the bespoke software system
	3.3 Identify different screen or menu routes that can be followed to meet customer requirements
	3.4 Identify sources of support and help for the bespoke software including manuals, help screens and help lines
	3.5 Explain the importance of preparing a work area before delivering customer service
	3.6 Explain search or other enquiry facilities within the bespoke software system
	3.7 State the importance of avoiding jargon and system terminology when communicating with customers
	3.8 Describe ways to respond to error messages when using a bespoke software system
	3.9 Identify referral points and sources of information when they are unable to meet customer needs using the bespoke software system

NB: The units above may also appear in the Level 3 Certificate in Property: Sale of Residential Property



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