



YMCA Level 3 Diploma in Business Administration (601/6827/4)

Qualification Specification



YMCA Awards

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Level 3 Diploma in Business Administration

Qualification Specification

Qualification number: 601/6827/4

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Introduction

About YMCA Awards

At YMCA Awards, we are passionate about learner progress. Our qualifications support every learner, whether they are taking their first steps into a new career or are looking to boost their skills. Our high quality resources and assessment materials have been created by industry experts in consultation with employers and training providers.

We are always looking to enhance what we have to offer, and we are committed to developing qualifications in complementary sectors to meet customer needs. We appreciate the vital role of business administration in the active leisure industry, and our range of business qualifications is created to the high standards and level of professionalism you have come to expect from YMCA Awards.

Qualification overview

This qualification is regulated by:

Ofqual
CCEA (Council for Curriculum, Examinations and Assessment)

Qualification aim

This qualification aims to help learners develop valued transferable, practical, communication and technical skills relevant to roles within business administration. These skills are valued by employers because they support the ongoing operations of an office, across a range of business sectors as well as public organisations.

Overview of knowledge, skills and understanding

This qualification covers appropriate fundamental and administrative skills such as negotiating in a business environment, managing an office facility and monitoring information systems, and it is targeted at those who are currently working in a business administration role within sectors such as educational institutions, government departments/civil service, NHS trusts, local authorities, charities and the private sector. The wide range of optional units available makes it ideal for learners who will benefit from increased skills appropriate to a range of vocational/occupational areas.

Target group and age range

The YMCA Level 3 Diploma in Business Administration is aimed at learners over the age of 16. The flexibility of the qualification's design allows it to be tailored to meet the interests and aspirations of individual learners to enable them to progress at work or seek higher level study to aid employment progression.

Qualification structure

The YMCA Level 3 Diploma in Business Administration is regulated by Ofqual. To achieve the YMCA Level 3 Diploma in Business Administration learners must complete a minimum of 58 credits: 27 credits from Mandatory Group A and a minimum of 13 credits from Optional Group B. A maximum of 10 credits can come from Optional Group C and a maximum of 8 credits from Optional Group D. A minimum of 40 credits must be achieved at/above Level 3.

Mandatory Group A. Learners must complete the following 5 mandatory units:

Unit reference number	Unit title	Level	Credit
D/506/1942	Principles of business	3	10
R/506/1940	Principles of business communication and information	3	4
Y/506/1910	Communicate in a business environment	3	4
Y/506/1941	Principles of administration	3	6
T/506/2952	Manage personal and professional development	3	3

Optional Group B. A minimum of 13 credits is required from this group:

Unit reference number	Unit title	Level	Credit
A/506/1916	Contribute to the development and implementation of an information system	3	6
D/506/1911	Contribute to the improvement of business performance	3	6
F/506/1920	Administer parking and traffic challenges, representations and civil parking appeals	3	5
H/506/1912	Negotiate in a business environment	3	4
J/506/1918	Evaluate the provision of business travel or accommodation Note: Barred combination with Unit Organise business travel or accommodation (D/506/1875)	3	5
K/506/1913	Develop a presentation	3	3
K/506/1944	Manage an office facility	3	4
L/506/1919	Provide administrative support in schools	3	5
L/506/1936	Build legal case files	3	5
M/506/1914	Deliver a presentation	3	3
M/506/1945	Analyse and present business data	3	6
R/506/1923	Administer statutory parking and traffic appeals	3	6
T/506/1915	Create bespoke business documents	3	4
T/506/1932	Administer parking and traffic debt recovery	3	5
Y/506/1938	Manage legal case files	3	5
A/506/1883	Administer the recruitment and selection process	2	3
D/506/1813	Handle mail	2	3
D/506/1875	Organise business travel or accommodation Note: Barred combination with Unit: Evaluate the provision of business travel or accommodation J/506/1918	2	4
H/506/1876	Provide administrative support for meetings	2	4
K/506/1815	Prepare text from notes using touch typing	2	4
L/506/1869	Contribute to the organisation of an event	2	3
L/506/1905	Employee rights and responsibilities	2	2
M/506/1816	Prepare text from shorthand	2	6
M/506/1895	Buddy a colleague to develop their skills	2	3
R/506/1811	Store and retrieve information	2	4
R/506/1887	Administer parking dispensations	2	3

R/506/1890	Administer finance	2	4
T/506/1817	Prepare text from recorded audio instruction	2	4
T/506/1879	Administer human resource records	2	3
Y/506/1809	Produce business documents	2	3
Y/506/1812	Produce minutes of meetings	2	3
D/506/1956	Resolve administrative problems	4	6
H/506/1957	Prepare specifications for contracts	4	4
R/506/1954	Support environmental sustainability in a business environment	4	4
J/506/1935	Administer legal files	3	5
F/506/1917	Monitor information systems	3	8
Y/506/2295	Maintain and issue stationery and supplies	2	3

Optional Group C. A maximum of 10 credits can be selected from this group:

Unit reference number	Unit title	Level	Credit
A/506/1821	Manage team performance	3	4
F/506/1934	Participate in a project Note: Barred combination with Unit Manage a project (R/506/1999)	3	3
J/506/1921	Manage individuals' performance	3	4
K/506/1930	Implement and maintain business continuity plans and processes	3	4
L/506/1922	Manage individuals' development in the workplace	3	3
M/506/1928	Procure products and/or services	3	5
T/506/1820	Promote equality, diversity and inclusion in the workplace	3	3
T/506/1929	Implement change	3	5
Y/506/1924	Chair and lead meetings	3	3
J/502/4397	Bespoke software	3	4
J/502/4626	Spreadsheet software	3	6
T/502/4556	Database software	3	6
Y/502/4629	Word processing software	3	6
T/502/4301	Using email	3	3
L/506/2150	Organise and deliver customer service	3	5
R/506/2151	Resolve customers' complaints	3	4
A/506/1995	Manage a budget	4	4
J/506/1949	Develop and maintain professional networks	4	3
K/506/1989	Manage physical resources	4	4
K/506/1992	Prepare for and support quality audits	4	3
L/506/2004	Manage business risk	4	6
R/506/1999	Manage a project Note: Barred combination with Unit Participate in a project (F/506/1934)	4	7
Y/506/1955	Develop and implement an operational plan	4	5
J/506/2292	Encourage innovation	3	4
Y/502/4632	Website software	3	5
T/502/4623	Presentation software	3	6
R/506/2909	Recruitment, selection and induction practice	4	6

Optional Group D. A maximum of 8 credits can be selected from this group:

Unit reference number	Unit title	Level	Credit
F/502/9937	Principles of digital marketing and research	3	7
J/502/9938	Principles of marketing stakeholder relationships	3	3
K/502/9933	Principles of market research	3	5

T/502/9935	Principles of marketing and evaluation	3	7
Y/506/2152	Understand the customer service environment	3	5
D/506/1939	Understand the legal context of business	3	6
R/503/9324	Principles of social media within a business	3	6
F/506/2596	Principles of leadership and management	3	8

Barred units:

Barred Unit	Unit
Source Unit	Target Unit
Evaluate the provision of business travel or accommodation (J/506/1918)	Organise business travel or accommodation (D/506/1875)
Participate in a project (F/506/1934)	Manage a project (R/506/1999)

The Total Qualification Time (TQT) for this qualification is 580. The Guided Learning Hours (GLH) assigned are a minimum of 282 and a maximum of 432.

Total Qualification Time (TQT)

This is an estimate of the total amount of time, measured in hours that a learner would reasonably need to be able to show the level of achievement necessary for the award of a qualification.

Total Qualification Time is made up of the following two elements:

- The number of hours which an awarding organisation has assigned to a qualification for Guided Learning (see below), and
- An estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

Guided Learning Hours (GLH)

This is:

- Face-to-face delivery (learning delivered by a lecturer, supervisor, tutor or other appropriate member of the training team)
- E-learning with a lecturer, teacher or tutor present/available in real-time (the co-presence of learner and tutor can be either remote or in the same physical place)
- Invigilated assessment (external tests sat under controlled or open-book conditions)
- Internal assessment carried out by the learner with a lecturer, teacher or tutor present/available in real-time (the co-presence of learner and tutor can be either remote or in the same physical place).

This is not:

Unsupervised learning such as:

- E-learning that the learner carries out unsupervised and with no real-time support from a lecturer, teacher or tutor
- Assessment internally carried out by the learner without a lecturer, teacher or tutor present/available in real-time (for example, completing a Learner Assessment Record (LAR) at home)
- Any additional further study, revision and training activities that the learner does unsupervised to support their learning.

Recommended Guided Learning Hours – our ongoing review

Your External Quality Assurer (EQA) will ask you to give feedback on GLH annually as part of the quality assurance visit. You should base your feedback on a typical learner taking this qualification and the time spent on supervised learning (GLH). If you feel the GLH is different from the above and you wish to offer feedback before your next EQA visit, please email us: awards.products@ymca.co.uk.

Entry requirements

Although learners may find it beneficial to have previously achieved a Level 2 qualification, particularly in a business administration-related discipline, no prior qualifications are required. Learners must be aged 16+.

Opportunities for progression

Future employment possibilities

This qualification supports the personal growth of a learner and their ability to operate with a greater level of confidence and competence within a business environment. As such, this qualification supports the learner towards gaining employment in roles such as:

- Administrator
- Secretary
- Receptionist
- Executive assistant
- Personal assistant
- Office supervisor/team leader
- Finance assistant

Progression to further/higher level learning

This qualification is designed for entry and progression within employment, however the skills and knowledge acquired through its completion could be used towards further qualifications in business administration or management. Achievement of the qualification could also provide good grounding in underpinning knowledge and skills for progression to an Advanced Apprenticeship in Management, Enterprise or other related vocational area.

Mapping to standards

Information regarding Business and Administration National Occupational Standards (NOS) can be found at www.skillsfca.org.

Centre approval

This qualification can only be offered by centres approved by YMCA Awards to deliver it. Details of YMCA Awards approvals processes can be found on our website: www.ymcaawards.co.uk/centres/become-a-ymca-awards-centre.

Qualification approval

If your centre is already approved, you should only need to complete and submit a qualification approval form to deliver this qualification. However, you may also need to complete an additional staff approval form if the qualification is going to be delivered by staff who are not currently approved by YMCA Awards. Details of additional approvals can be found on our website: www.ymcaawards.co.uk/approvals.

Tutor, assessor and IQA approval requirements

To make sure you meet the most up-to-date requirements please see the YMCA Awards staff approval requirement document. This can be found on our website: www.ymcaawards.co.uk/centres/centre-guidance.

Registration

All learners must be registered within the first 10% of the duration of their course (e.g., for a course that lasts 10 days, learners should be registered on the first day of their course at the latest). For further details on registration please go to our website: www.ymcaawards.co.uk/registration.

Qualification availability

This qualification is available in:
England and regulated by Ofqual
Northern Ireland and regulated by CCEA (Council for Curriculum, Examinations and Assessment)

This qualification is available as:

- A standalone qualification
- Part of an advanced apprenticeship framework

Reasonable adjustments and special considerations

In making this qualification available, YMCA Awards has made every attempt to make sure that there are no unnecessary barriers to achievement. You can find full details of our reasonable adjustment and special considerations policy on our website: www.ymcaawards.co.uk/centres/policies-and-procedures.

Enquires and appeals procedures

YMCA Awards has an appeals procedure in accordance with the regulatory arrangements in the General Conditions of Recognition. Full details of these procedures are available on our website: www.ymcaawards.co.uk/centres/policies-and-procedures.

Assessment and quality assurance

How the qualification is assessed

Assessment is the process of measuring a learner's skills, knowledge and understanding against the standards set in the qualification.

This qualification is a unit-based qualification and each unit contains learning outcomes and assessment criteria. Learning outcomes set out what the learner is expected to know, understand or be able to do as a result of the learning process. Assessment criteria detail the standards a learner is expected to meet and are broken down into what the learner 'can' do as a result of successfully achieving the unit.

The learner can be assessed holistically or individually as long as they show that the learning outcomes have been achieved.

Competency-based learning outcomes (e.g., be able to) are typically assessed through direct observation and these will take place in a real work environment. Where a real work environment is not stipulated the observation can be simulated and be internally assessed.

Knowledge-based learning outcomes (e.g., know or understand) can be assessed in a number of different ways such as worksheets, projects and professional discussion. The assessment method chosen should reflect the content of the unit.

This qualification must be assessed in line with YMCA Awards assessment policies and procedures www.ymcaawards.co.uk/centres/centre-guidance.

The YMCA Awards Level 3 Diploma in Business Administration is assessed through Internal assessment.

Internal assessment

YMCA Awards suggest the following approaches to internal assessment:

Using a Learner Assessment Record (LAR)

A YMCA Awards Learner Assessment Record (LAR) is available for the 5 mandatory units of this qualification. The YMCA Learner Assessment Record for the 5 mandatory units is accessible by logging into the centre home section on the website, follow this link: www.ymcaawards.co.uk/download-resources/lars.

This document typically contains assessment guidance and paperwork developed by YMCA Awards to support the assessment of a qualification.

Creating a portfolio of evidence

A YMCA Learner Assessment Record (LAR) is not available for the optional units, so the learner must create a portfolio of evidence. Centres are required to work with learners to create this portfolio and need to make sure that the learner's portfolio shows coverage of the learning outcomes and/or assessment criteria where required.

A typical portfolio of evidence could include:

- assessor observation – completed observational checklists and related action plans
- witness testimony
- candidate's proof of work
- worksheets
- assignments/projects/reports
- record of professional discussion
- record of oral and written questioning
- candidate and peer reports
- Recognition of Prior Learning (RPL).

Centres need to make sure assessment specifications and paperwork are signed off by the EQA before delivery.

As a guide to selecting appropriate assessment methods, see the suggested example in the 'Qualification content' section of this specification. We also have a selection of Word template documents that you might find useful when creating your learner's portfolio of evidence;

External assessment

There are no external assessments for this qualification.

Assessors

The role of the assessor is to make an informed judgement about the evidence a learner should provide to show they can meet the assessment criteria. For further guidance please see the 'Role of the assessor' document on the website: www.ymcaawards.co.uk/centres/centre-guidance.

Internal and external quality assurance

The role of the Internal Quality Assurer (IQA) is to make an informed judgement regarding the practice of and decisions made by the assessment team to maintain standards. They are a vital link between the assessors and the External Quality Assurer (EQA). For further information on the role of the IQA and the EQA go to the website: www.ymcaawards.co.uk/centres/centre-guidance.

Unit specifications and recommended assessment methods

Mandatory Group A

Principles of business (D/506/1942)

Unit aim:

The aim of this unit is for the learner to develop commercial awareness and understanding of business operations. Key factors to this are being able to manage budgets and finance plus having an understanding of sales and marketing functions and how all of this contributes to the innovation process and growth of a business.

In this unit the learner will understand the structure and legal obligations of different types of businesses and how business markets operate and shape the activity of an organisation. The learner will have the opportunity to consider the importance of innovation in contributing to business objectives and review the benefits, risks and implications of innovation. The learner will also gain an understanding of financial terminology and financial management to improve business skills. Considering the importance of budgeting and financial viability will allow the learner to understand the consequences of poor financial management. The learner will also explore the principles of sales and marketing and the relationship between the two.

Unit content:

The learner will:

1. Understand business markets

The learner can:

- 1.1 Explain the characteristics of different business markets
- 1.2 Explain the nature of interactions between businesses within a market
- 1.3 Explain how an organisation's goals may be shaped by the market in which it operates
- 1.4 Describe the legal obligations of a business

The learner will:

2. Understand business innovation and growth

The learner can:

- 2.1 Define business innovation
- 2.2 Explain the uses of models of business innovation
- 2.3 Identify sources of support and guidance for business innovation
- 2.4 Explain the process of product or service development
- 2.5 Explain the benefits, risks and implications associated with innovation

The learner will:

3. Understand financial management

The learner can:

3.1 Explain the importance of financial viability for an organisation

3.2 Explain the consequences of poor financial management

3.3 Explain different financial terminology

The learner will:

4. Understand business budgeting

The learner can:

4.1 Explain the uses of a budget

4.2 Explain how to manage a budget

The learner will:

5. Understand sales and marketing

The learner can:

5.1 Explain the principles of marketing

5.2 Explain a sales process

5.3 Explain the features and uses of market research

5.4 Explain the value of a brand to an organisation

5.5 Explain the relationship between sales and marketing

Assessment

worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Principles of business communication and information (R/506/1940)

Unit aim:

The aim of this unit is to identify the importance of negotiating with others in a business environment, including the features and uses of different approaches and key components of negotiation. It also encourages the learner to develop and deliver different types of presentations and collect feedback from others on their practice. The unit includes creating and presenting high-quality bespoke documents which is fundamental to being able to communicate effectively with others. Finally, the unit covers types of information systems, the stages of development, their benefits and limitations plus the legal, security and confidentiality requirements.

In this unit the learner will understand how to negotiate with people to achieve planned objectives. They will gain an understanding of how to develop and deliver presentations and use feedback to improve their skills. They will explore a range of information sources and systems and learn how they can be developed to support business operations. They will also learn how to design and produce a range of bespoke business documents including consideration for legal, security and confidentiality requirements of information systems.

Unit content:

The learner will:

1. Understand negotiation in a business environment

The learner can:

1.1 Explain the importance of negotiation in a business environment

1.2 Explain the features and uses of different approaches to negotiation

1.3 Identify the components of negotiation tactics

The learner will:

2. Understand how to develop and deliver presentations

The learner can:

2.1 Explain the different types of presentation and their requirements

2.2 Explain how different resources can be used to develop a presentation

2.3 Explain different methods of giving presentations

2.4 Explain best practice in delivering presentations

2.5 Explain how to collect and use feedback on a presentation

The learner will:

3. Understand how to create bespoke business documents

The learner can:

3.1 Explain the characteristics of bespoke documents

3.2 Explain the factors to be taken into account in creating and presenting bespoke documents

3.3 Explain the legal requirements and procedures for gathering information for bespoke documents

3.4 Explain techniques to create bespoke business documents

3.5 Explain how to gain approval of bespoke documents

The learner will:

4. Understand information systems in a business environment

The learner can:

4.1 Explain the typical stages of information system development

4.2 Analyse the benefits and limitations of different information systems

4.3 Explain legal, security and confidentiality requirements for information systems in a business environment

4.4 Explain how to monitor the use and effectiveness of an information system

Assessment

worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Communicate in a business environment (Y/506/1910)

Unit aim:

The aim of this unit is to recognise how important communication is in a business environment. Communicating effectively both verbally and in writing with internal and external people is vital to the success of any business. Understanding different types of communication media, user needs and requirements and being able to produce good quality bespoke documentation in accordance with organisational requirements are critical to managing information effectively in a business environment.

In this unit the learner will look at a range of business communication models, systems and processes including verbal and non-verbal. The learner will look at how they should use appropriate spoken language, tone of voice and body language during verbal discussions, and when responding to others. The learner will identify barriers to effective communication and explore strategies to overcome these when communicating with others. The learner will also consider language, content, structure and accuracy of information in written communications. The learner will learn how to respond appropriately to an audience, taking into account their needs, the situation, and organisational policies and standards.

Unit content:

The learner will:

1. Understand business communication models, systems and processes

The learner can:

- 1.1 Analyse the communication needs of internal and external stakeholders
- 1.2 Analyse the different communication models that support administration
- 1.3 Evaluate the effectiveness of different communication systems
- 1.4 Explain the factors that affect the choice of communication media
- 1.5 Explain the importance of using correct grammar, sentence structure, punctuation, spelling and conventions in business communications
- 1.6 Explain the factors to be taken into account in planning and structuring different communication media
- 1.7 Explain ways of overcoming barriers to communication
- 1.8 Explain the use of communications theories and body language

1.9 Explain proof reading techniques for business communications

The learner will:

2. Be able to communicate in writing in business

The learner can:

- 2.1 Identify the purpose and audience of the information to be communicated
- 2.2 Select communication media that are appropriate to the audience and information to be communicated
- 2.3 Present information in the format, layout and style that is appropriate to the information to be communicated
- 2.4 Follow agreed business practices when communicating in writing
- 2.5 Adapt the style and content of a communication, appropriate to specific audiences
- 2.6 Present written communications that are clear, expressed in correct grammar and reflect what is intended
- 2.7 Meet agreed deadlines in communicating with others

The learner will:

3. Be able to communicate verbally in business

The learner can:

- 3.1 Identify the nature, purpose, audience and use of the information to be communicated
- 3.2 Use language that is correct and appropriate for the audience's needs
- 3.3 Use appropriate body language and tone of voice to reinforce messages
- 3.4 Identify the meaning and implications of information that is communicated verbally
- 3.5 Confirm that a recipient has understood correctly what has been communicated
- 3.6 Respond in a way that is appropriate to the situation and in accordance with organisational policies and standards

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Principles of administration (Y/506/1941)

Unit aim:

The aim of this unit is to introduce the learner to managing an office facility including the legal requirements, systems, procedures, resources and support requirements. It also informs the learner how to chair, lead and manage meetings including taking minutes. The unit also covers how to supervise a team of administrators and organise a range of events.

In this unit the learner will understand administrative support services, for example monitoring the use of office resources, working in a team and supporting colleagues. The learner will explore the key legal requirements affecting the work of an office facility and investigate procedures for managing office resources, procedures and workflows. The learner will identify the health and safety requirements that an office facility must meet, including the legal obligations, procedures and staff responsibilities. The learner will gain an understanding of business meetings, including the process, purpose, implications and importance of taking meeting minutes, and the requirements, responsibilities and techniques for chairing meetings. The learner will explore how techniques and targets can be used to help manage both team and individual performance. Finally, the learner will consider what information, resources and planning processes are needed to organise a business event.

Unit content:

The learner will:

1. Understand how to manage an office facility

The learner can:

1.1 Explain the legal requirements relating to the management of office facilities

1.2 Describe the typical services provided by an office facility

1.3 Explain how to establish office management procedures

1.4 Explain how to manage office resources

1.5 Explain techniques to monitor and manage work flows

1.6 Explain typical support and welfare facilities for office workers

The learner will:

2. Understand health and safety in a business environment

The learner can:

2.1 Explain the legal obligations of the employer for health and safety in the workplace

2.2 Explain an individual's responsibilities for health and safety in the workplace

2.3 Describe accident and emergency procedures

The learner will:

3. Understand how to take minutes of meetings

The learner can:

3.1 Explain the purpose of meeting minutes

3.2 Explain the legal implications of meeting minutes

3.3 Explain the importance of accuracy in minute taking

3.4 Describe what should and should not be included in different types of meeting minutes

3.5 Describe how to take notes during meetings

The learner will:

4. Understand how to chair, lead and manage meetings

The learner can:

4.1 Explain the features and purpose of different types of formal and informal meeting

4.2 Explain the role and responsibilities of the chair

4.3 Explain the roles of others in a meeting

4.4 Explain techniques to facilitate a meeting

4.5 Explain the information requirements of a meeting before, during and after a meeting

The learner will:

5. Understand how to supervise an administration team

The learner can:

5.1 Explain the use of targets and budgets to manage workloads

5.2 Explain how to allocate work to individual team members

5.3 Explain different quality management techniques to manage the performance of an administrative team

5.4 Explain the techniques used to identify the need for improvements in team outputs and standards

The learner will:

6. Understand how to organise events

The learner can:

6.1 Explain the characteristics, requirements and purposes of different types of events

6.2 Explain the types of information and information sources needed to organise an event

6.3 Explain how to plan an event

6.4 Explain how to identify the right resources from an event plan

6.5 Describe the likely types of information needed by delegates before, during and after an event

Assessment

worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Manage personal and professional development (T/506/2952)

Unit aim:

The aim of this unit is to focus on the learning processes that underpin the development of personal and professional skills. It will highlight the need for individuals to keep up to date with the skills, knowledge and experience required for working in an ever changing environment.

In this unit the learner will understand how to identify and evaluate their own personal and professional development needs, comparing sources of information on trends and developments in their chosen industry.

The learner will review how important professional and personal development is to both an individual and a business, and how to take advantage of different learning and development opportunities to meet current and future needs. The learner will create a personal development plan (PDP) and set developmental targets, and then, with the advice and feedback of others, review, amend and update their plan.

Unit content:

The learner will:

1. Be able to identify personal and professional development requirements

The learner can:

1.1 Compare sources of information on professional development trends and their validity

1.2 Identify trends and developments that influence the need for professional development

1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation

The learner will:

2. Be able to fulfil a personal and professional development plan

The learner can:

2.1 Evaluate the benefits of personal and professional development

2.2 Explain the basis on which types of development actions are selected

2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis

2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives

2.5 Execute the plan within the agreed budget and timescale

2.6 Take advantage of development opportunities made available by professional networks or professional bodies

The learner will:

3. Be able to maintain the relevance of a personal and professional development plan

The learner can:

3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives

3.2 Obtain feedback on performance from a range of valid sources

3.3 Review progress towards personal and professional objectives

3.4 Amend the personal and professional development plan in the light of feedback received from others

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Optional Group B. A minimum of 13 credits is required from this group

Contribute to the development and implementation of an information system (A/506/1916)

Unit aim:

The learner will explore different information systems and explain how these are designed and implemented. They will contribute to developing and implementing a system within a business environment.

Unit content:

The learner will:

1. Understand the design and implementation of an information system

The learner can:

1.1 Explain the types of information to be managed by a system

1.2 Explain how information will be used and by whom

1.3 Explain who needs to be consulted in the design and implementation of an information system and why

1.4 Explain the impact of legal and organisational security and confidentiality requirements for the design and implementation of an information system

The learner will:

2. Be able to contribute to the development of an information system

The learner can:

2.1 Confirm the purpose, use and features of an information system

2.2 Identify the information that will be managed by the system

2.3 Confirm requirements for reporting information

2.4 Recommend the functions that will be used to manipulate and report information

2.5 Develop guidance for the use of an information system that is accurate and easy to understand

2.6 Recommend user access and security levels for the information system

2.7 Make contributions to the development of an information system that are consistent with business objectives and values and within budgetary constraints

2.8 Participate in system tests in accordance with the specification

The learner will:

3. Be able to contribute to the implementation of an information system

The learner can:

3.1 Implement the information system in accordance with the plan, minimising disruption to business

3.2 Confirm that staff are trained to use the system prior to its launch

3.3 Resolve or report problems or faults with the information system within the limits of their own authority

3.4 Adhere to organisational policies and procedures, and legal and ethical requirements in the implementation of an information system

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Contribute to the improvement of business performance (D/506/1911)

Unit aim:

The learner will solve problems in a business environment involving customers and other stakeholders. They will contribute to the improvement of activities through the recommendation and use of business improvement techniques.

Unit content:

The learner will:

1. Understand the principles of resolving business problems

The learner can:

1.1 Explain the use of different problem-solving techniques

1.2 Explain the organisational and legal constraints relating to problem-solving

1.3 Describe the role of stakeholders in problem-solving

1.4 Describe the steps in the business' decision-making process

1.5 Analyse the implications of adopting recommendations and implementing decisions to solve business problems

The learner will:

2. Understand improvement techniques and processes

The learner can:

2.1 Describe the purpose and benefits of continuous improvement

2.2 Analyse the features, use and constraints of different continuous improvement techniques and models

2.3 Explain how to carry out a cost-benefit analysis

2.4 Explain the importance of feedback from customers and other stakeholders in continuous improvement

The learner will:

3. Be able to solve problems in business

The learner can:

- 3.1 Identify the nature, likely cause and implications of a problem
- 3.2 Evaluate the scope and scale of a problem
- 3.3 Analyse the possible courses of action that can be taken in response to a problem
- 3.4 Use evidence to justify the approach to problem-solving
- 3.5 Develop a plan and success criteria that are appropriate to the nature and scale of a problem
- 3.6 Obtain approval to implement a solution to a problem
- 3.7 Take action to resolve or mitigate a problem
- 3.8 Evaluate the degree of success and scale of the implications of a solved problem

The learner will:

4. Be able to contribute to the improvement of activities

The learner can:

- 4.1 Identify the nature, scope and scale of possible contributions to continuous improvement activities
- 4.2 Measure changes achieved against existing baseline data
- 4.3 Calculate performance measures relating to cost, quality and delivery
- 4.4 Justify the case for adopting improvements identified with evidence
- 4.5 Develop standard operating procedures and resource plans that are capable of implementing agreed changes

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Administer parking and traffic challenges, representations and civil parking appeals (F/506/1920)

Unit aim:

The learner will understand the complete process for the administration of parking challenges, representations and civil parking appeals. They will be able to follow the relevant legislation, codes of practice and organisational requirements when processing and recording appeals.

Unit content:

The learner will:

1. Understand the administration of parking and traffic challenges

The learner can:

1.1 Explain the provisions and constraints of relevant legislation, codes of practice, Traffic Regulation Orders and the Data Protection Act

1.2 Explain how to access, use and interpret the information needed to process challenges, representations and Civil Parking Notice (CPN) appeals

1.3 Evaluate the importance of keeping accurate and up-to-date records of information and decisions

1.4 Explain how to validate information in the administration of parking and traffic challenges

1.5 Explain the features and use of specialist software to process and record challenges, representations and CPN appeals

1.6 Explain the types of internal evidence needed to support reliable decisions for the administration of parking and traffic challenges

1.7 Explain when and why it may be appropriate to reactivate the enforcement process

The learner will:

2. Be able to process the receipt of challenges, representations and CPN appeals

The learner can:

- 2.1 Record the receipt of written challenges, representations and CPN appeals
- 2.2 Confirm that the information is complete, accurate, consistent and valid
- 2.3 Decide whether to allow or uphold the appeal against recognised eligibility criteria
- 2.4 Provide accurate advice and information on the progress and outcome of the case

The learner will:

3. Be able to respond to challenges, representations and CPN appeals

The learner can:

- 3.1 Confirm that the information is complete, accurate, consistent and valid
- 3.2 Suspend the enforcement process while cases are being investigated
- 3.3 Obtain additional evidence where gaps are identified
- 3.4 Seek appropriate advice on cases beyond their level of authority
- 3.5 Refer cases beyond their level of authority to the right person
- 3.6 Inform customers of the decision and possible courses of action they can take within the agreed timescale
- 3.7 Adhere to organisational policies and procedures, and legal and ethical requirements when responding to challenges, representations and CPN appeals

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Negotiate in a business environment (H/506/1912)

Unit aim:

The learner will appreciate the importance of negotiation in business and be able to research and prepare a strategy to negotiate with others to achieve business aims. Having done this, they will then negotiate with others, taking care to record the outcomes and comply with organisational, legal and ethical requirements.

Unit content:

The learner will:

1. Understand the principles underpinning negotiation

The learner can:

- 1.1 Describe the requirements of a negotiation strategy
- 1.2 Explain the use of different negotiation techniques
- 1.3 Explain how research on the other party can be used in negotiations
- 1.4 Explain how cultural differences might affect negotiations

The learner will:

2. Be able to prepare for business negotiations

The learner can:

- 2.1 Identify the purpose, scope and objectives of the negotiation
- 2.2 Explain the scope of their own authority for negotiating
- 2.3 Prepare a negotiating strategy
- 2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities
- 2.5 Assess the likely objectives and negotiation stances of the other party
- 2.6 Research the strengths and weaknesses of the other party

The learner will:

3. Be able to carry out business negotiations

The learner can:

3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities

3.2 Adapt the conduct of the negotiation in accordance with changing circumstances

3.3 Maintain accurate records of negotiations, outcomes and agreements made

3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Evaluate the provision of business travel or accommodation (J/506/1918)

Unit aim:

The learner will identify the key factors against which to evaluate business travel or accommodation. They will assess the quality of existing provision and identify improvements including the use of potential new providers.

Unit content:

The learner will:

1. Understand the provision of business travel or accommodation arrangements

The learner can:

1.1 Explain the factors to be taken into account in setting evaluation criteria for the provision of business travel or accommodation

1.2 Explain different travel- or accommodation-related needs and services

1.3 Explain different arrangements that could be made for the provision of business travel or accommodation

1.4 Explain the scope of legal and organisational security and confidentiality requirements relating to business travel or accommodation

The learner will:

2. Be able to evaluate the quality of organisational business travel or accommodation arrangements

The learner can:

2.1 Assess the performance of providers of travel or accommodation against agreed criteria

2.2 Identify instances of exceptional and inadequate performance

2.3 Evaluate the benefits and limitations of existing arrangements for organising business travel or accommodation and their implications

2.4 Identify alternative potential providers and ways of providing travel or accommodation

The learner will:

3. Be able to recommend improvements to organisational business travel or accommodation arrangements

The learner can:

3.1 Produce costed plans that set out different options, their benefits, limitations and implications

3.2 Shortlist alternative potential providers of business travel or accommodation against agreed criteria

3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when recommending improvements to arrangements for business travel or accommodation

Assessment

witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Develop a presentation (K/506/1913)

Unit aim:

The learner will develop a presentation based on best practice. They will select appropriate resources and materials relevant to the audience and structure the content in a logical way.

Unit content:

The learner will:

1. Understand how to develop a presentation

The learner can:

1.1 Explain best practice in developing presentations

1.2 Explain who needs to be consulted on the development of a presentation

1.3 Explain the factors to be taken into account in developing a presentation

1.4 Analyse the advantages and limitations of different communication media

The learner will:

2. Be able to develop a presentation

The learner can:

2.1 Identify the purpose, content, style, timing and audience for a presentation

2.2 Select a communication media that is appropriate to the nature of a presentation, message and audience

2.3 Tailor a presentation to fit the timescale and audience's needs

2.4 Prepare a presentation that is logically structured, summarises the content and addresses the brief

2.5 Take action to ensure that a presentation adheres to organisational guidelines and policies

2.6 Develop materials that support the content of a presentation

Assessment	assessor observation witness testimony candidate's proof of work worksheets assignments/projects/reports record of professional discussion record of oral and written questioning candidate and peer reports
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Manage an office facility (K/506/1944)

Unit aim:

Learners will review a range of office systems and procedures relevant to the effective running of an office environment. They will manage and maintain the systems, making recommendations for improvements to meet customers' needs.

Unit content:

The learner will:

1. Understand the management of an office facility

The learner can:

- 1.1 Explain the requirements of establishing and implementing office management procedures
- 1.2 Explain how to manage the effectiveness of work and systems
- 1.3 Explain how to manage any constraints attached to office facilities and related budgets
- 1.4 Explain the factors to be taken into account in the design of office systems, procedures and guidance documents
- 1.5 Explain how to create an environment that is conducive to productive work

The learner will:

2. Be able to manage and maintain an office facility

The learner can:

- 2.1 Maintain equipment and consumables to agreed levels
- 2.2 Establish systems to evaluate the effectiveness of office systems and procedures
- 2.3 Review the effectiveness of office systems and procedures to meet users' needs, adapting them to meet changing demands
- 2.4 Manage the maintenance of office equipment to meet users' needs and expectations
- 2.5 Manage effective relationships with suppliers
- 2.6 Take action to ensure that administrative services are provided to agreed standards

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Provide administrative support in schools (L/506/1919)

Unit aim:

Learners will understand the specific requirements for providing administrative support in a school including child protection and student welfare. They will be able to carry out these services while working with others and maintaining accurate records.

Unit content:

The learner will:

1. Understand administration within a school environment

The learner can:

- 1.1 Analyse the scope, use and requirements of a school administrative system
- 1.2 Explain how their own role contributes to the achievement of a school's goals
- 1.3 Describe the policy context, issues and initiatives that affect the work of a school administrator
- 1.4 Explain a school's administration policy and procedures for dealing with others
- 1.5 Explain the requirements and procedures for dealing with child protection and student welfare
- 1.6 Explain when it may be appropriate to override the requirement to maintain confidentiality

The learner will:

2. Be able to provide administrative services

The learner can:

- 2.1 Build positive working relationships with others
- 2.2 Present a professional and friendly image in line with school policy
- 2.3 Co-ordinate the content and publishing of documents in accordance with the brief
- 2.4 Organise trips, events, placements, secondments or work experience in accordance with the brief
- 2.5 Maintain facilities to the required standard
- 2.6 Adhere to organisational policies and procedures, and legal and ethical requirements when providing administrative services

The learner will:

3. Be able to operate school administrative systems and procedures

The learner can:

3.1 Maintain accurate records

3.2 Maintain the currency of registers, licences and contracts

3.3 Present reports and statistical returns on time in the agreed format

3.4 Select analysis and evaluation techniques that are appropriate to the purpose of the report and the nature of the information

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Build legal case files (L/506/1936)

Unit aim:

Learners will build legal case files to meet required deadlines, using a range of techniques to access sources of evidence and information. They will identify any gaps in the contents of the legal files and take the necessary action to make sure organisational targets are met.

Unit content:

The learner will:

1. Understand how to build legal case files

The learner can:

1.1 Explain the administrative requirements of the different legal areas being administered

1.2 Explain the scope and limits of their own responsibilities and authority

1.3 Explain the requirements of the duty of confidentiality

1.4 Explain how to identify shortfalls in evidence and materials

1.5 Explain the features and uses of different interviewing techniques

1.6 Explain the use of specialist software for processing legal cases

1.7 Explain how to access and use sources of information and evidence

1.8 Explain the potential consequences of not meeting deadlines when building a legal case file

The learner will:

2. Be able to build case files

The learner can:

2.1 Identify gaps in evidence and materials needed

2.2 Carry out interviews in accordance with the principles of best practice in communication and interviewing

2.3 Obtain evidence and materials needed to complete the file

2.4 Generate correspondence that conforms with the house style and regulatory requirements

2.5 Submit cases on time in line with internal and external deadlines

2.6 Complete follow-up actions in accordance with the instructions

2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when building case files

Assessment	assessor observation witness testimony candidate's proof of work worksheets assignments/projects/reports record of professional discussion record of oral and written questioning candidate and peer reports
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Deliver a presentation (M/506/1914)

Unit aim:

Learners will select media based on audience requirements to deliver a presentation. They will prepare the venue, equipment and resources and communicate confidently during the delivery, including responding to questions.

Unit content:

The learner will:

1. Understand the principles underpinning the delivery of presentations

The learner can:

1.1 Analyse the advantages and limitations of different methods of, and media for, making presentations

1.2 Explain how the type and size of the audience affects the delivery of a presentation

1.3 Explain the factors to be taken into account in developing contingency plans when delivering presentations

1.4 Explain voice projection and timing techniques when delivering presentations

1.5 Explain the factors to be taken into account in responding to questions from an audience

1.6 Explain different methods for evaluating the effectiveness of a presentation

The learner will:

2. Be able to prepare to deliver a presentation

The learner can:

2.1 Confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation

2.2 Develop contingency plans for potential equipment and resource failure

2.3 Take action to ensure that the presentation fits the time slot available

The learner will:

3. Be able to deliver a presentation

The learner can:

3.1 Speak clearly and confidently, using language that is appropriate for the topic and the audience

3.2 Vary their voice tone, pace and volume appropriately when delivering a presentation

3.3 Use body language in a way that reinforces messages

3.4 Use equipment and resources effectively when delivering a presentation

3.5 Deliver a presentation within the agreed timeframe

3.6 Respond to questions in a way that meets the audience's needs

3.7 Evaluate the effectiveness of a presentation

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Analyse and present business data (M/506/1945)

Unit aim:

The learner will understand the importance of using valid sources of business data to draw reliable conclusions. They will analyse data, check for accuracy and present the information in an agreed business format.

Unit content:

The learner will:

1. Understand the analysis and presentation of business data

The learner can:

- 1.1 Explain the uses and limitations of primary and secondary data
- 1.2 Explain the uses and limitations of quantitative and qualitative data
- 1.3 Evaluate the issues relating to the validity and reliability of data and its analysis
- 1.4 Explain the use of IT tools to carry out research
- 1.5 Assess the risks attached to making judgments based on limited or unrepresentative samples
- 1.6 Assess the risks attached to generalising research findings
- 1.7 Explain different formats and techniques for the presentation of the analysis

The learner will:

2. Be able to analyse quantitative and qualitative business data

The learner can:

- 2.1 Agree the parameters of the analysis
- 2.2 Clarify any ethical requirements of the analysis
- 2.3 Organise the data in a way that will facilitate its analysis
- 2.4 Select valid and reliable data analysis methods and techniques that are appropriate to the data and analysis objectives

2.5 Apply analytical techniques that are appropriate to the purpose of the research and the nature of the data

2.6 Confirm the accuracy of data analysis and make necessary adjustments

2.7 Draw conclusions that are valid and supported by evidence

The learner will:

3. Be able to present the analysis of business data

The learner can:

3.1 Present data in the agreed reporting format and house style

3.2 Acknowledge the limitations of the analysis

3.3 Reference data sources

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Administer statutory parking and traffic appeals (R/506/1923)

Unit aim:

The learner will understand the complete process for administering statutory parking and traffic appeals including investigations and the preparation of case summaries. They will be able to prepare case evidence to investigate appeals by following organisational policies, procedures and legal requirements.

Unit content:

The learner will:

1. Understand the administration of statutory parking and traffic appeals

The learner can:

- 1.1 Explain the requirements, rules and constraints of relevant legislation, codes of practice and the Data Protection Act
- 1.2 Explain the grounds on which someone may appeal and on which they may file a statement of truth
- 1.3 Explain the evidence needed to carry out an investigation
- 1.4 Explain how to validate information for statutory parking and traffic appeals
- 1.5 Explain the requirements for preparing and presenting a case summary
- 1.6 Explain the preparations and codes of conduct relating to attending a hearing for statutory parking and traffic appeals
- 1.7 Describe the actions needed to close a case and refund fees
- 1.8 Explain who needs to be informed of the outcomes of a statutory appeal and why
- 1.9 Explain the features of specialist software to process and record statutory appeals
- 1.10 Explain the potential consequences of not acting within the given deadline
- 1.11 Explain when and why an appeal may be referred by an adjudicator to an independent person to consider mitigation

1.12 Explain the actions needed to reactivate the recovery process after the failure of statutory parking and traffic appeals

The learner will:

2. Be able to prepare case evidence for statutory parking and traffic appeals

The learner can:

2.1 Record the receipt of statutory appeal notifications or revocation orders

2.2 Confirm that the information is accurate and consistent

2.3 Notify the right person of any discrepancies

2.4 Meet the requirements of the deadline

The learner will:

3. Be able to investigate cases for statutory appeals

The learner can:

3.1 Confirm that the information supplied is accurate, valid and reliable

3.2 Obtain additional evidence where gaps are identified

3.3 Refer cases beyond their own level of authority to the right person

3.4 Make and record decisions in statutory appeal cases on the basis of the evidence provided

3.5 Keep the adjudicator and appellant or respondent informed of progress and outcomes

3.6 Adhere to organisational policies and procedures, and legal and ethical requirements when investigating cases for statutory appeals

The learner will:

4. Be able to contest statutory parking and traffic appeals

The learner can:

4.1 Prepare a case summary in accordance with organisational guidelines and codes of practice

4.2 Collate, label and present documentation in the format required by the appeals service

4.3 Respond promptly to requests for further information

4.4 Inform everyone who needs to know of the outcomes of a statutory appeal

4.5 Keep accurate records of information and decisions made

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Create bespoke business documents (T/506/1915)

Unit aim:

The learner will be able to create a range of bespoke business documents using technology to help them produce attractive documents which clearly communicate the corporate identity of an organisation.

Unit content:

The learner will:

1. Understand how to create bespoke business documents

The learner can:

1.1 Explain the use of bespoke business documents

1.2 Describe the factors to be taken into account in selecting the appropriate method of presenting a business document

1.3 Describe the use of technology to create bespoke business documents

1.4 Explain the purpose and requirements of corporate identity in bespoke business documents

1.5 Analyse different design techniques used to create attractive bespoke business documents

1.6 Explain the factors to be taken into account in evaluating the impact of bespoke business documents

The learner will:

2. Be able to design bespoke business documents

The learner can:

2.1 Confirm the purpose, nature, content, style, quality standards, audience and deadline of the document

2.2 Identify the optimum method of presenting the document

2.3 Create design options that meet the specification

2.4 Take into account feedback from stakeholders

The learner will:

3. Be able to create bespoke business documents

The learner can:

3.1 Include content that meets the brief, is accurate and grammatically correct

3.2 Use design techniques to create documents that meet the specification

3.3 Integrate non-text items into the agreed layout

3.4 Present documents within the agreed timescale

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Administer parking and traffic debt recovery (T/506/1932)

Unit aim:

The learner will be able to explain key roles and responsibilities in the parking and traffic debt recovery process. They will be able to explain the actions to be taken including requirements for documentation at each stage of the process.

Unit content:

The learner will:

1. Understand the parking and traffic debt recovery process

The learner can:

- 1.1 Explain the requirements, rules and constraints of relevant legislation, codes of practice and the Data Protection Act
- 1.2 Explain the criteria, policy and procedures relating to debt recovery
- 1.3 Analyse the role of the Traffic Enforcement Centre and magistrates' court in the debt recovery process
- 1.4 Explain the requirements of debt recovery documentation
- 1.5 Explain the features and benefits of different investigation techniques
- 1.6 Explain who needs to be informed of the outcomes of the debt recovery process and why
- 1.7 Explain the actions to be taken at each stage of the debt recovery process
- 1.8 Explain the potential consequences of an inadequate audit trail
- 1.9 Explain the actions needed to close a debt recovery case

The learner will:

2. Be able to administer the parking and traffic debt recovery process

The learner can:

2.1 Monitor the quality of the data to be registered at the Traffic Enforcement Centre or magistrates' court

2.2 Serve debt recovery documentation in accordance with organisational policy and relevant legislation

2.3 Prepare case evidence in accordance with organisational policy and relevant legislation

2.4 Make decisions on the basis of the evidence within the limits of their own authority

2.5 Inform everyone who needs to know of the progress and outcomes of the case

2.6 Monitor the performance of debt recovery agents

2.7 Take prompt action in the event of problems arising in the debt recovery process

2.8 Keep accurate and up-to-date records of actions and decisions taken

2.9 Adhere to organisational policies and procedures, and legal and ethical requirements when administering the parking and traffic debt recovery process

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Manage legal case files (Y/506/1938)

Unit aim:

The learner will be able to explain the requirements of a legal case file including confidentiality in addition to validating information and contents. They will manage case files according to organisational and legal requirements and meet required deadlines.

Unit content:

The learner will:

1. Understand the management of legal case files

The learner can:

1.1 Explain the administrative requirements of the different legal areas being administered

1.2 Explain the scope and limits of their own responsibilities and authority

1.3 Explain the requirements of the duty of confidentiality

1.4 Describe the structure, format and contents of a case file

1.5 Explain how to validate information when managing a legal case file

1.6 Explain the requirements of processing appeals

1.7 Explain the potential consequences of not meeting internal and external deadlines when managing a legal case file

The learner will:

2. Be able to manage case files

The learner can:

2.1 Plan the management of a case file to meet deadlines

2.2 Identify the location of required documents and materials

2.3 Take action to ensure the file contains accurate and up-to-date information, documents and materials and is secure

2.4 Take action to ensure court bundles are prepared correctly

2.5 Generate correspondence and documents that conform with the requirements of house style and legal and procedural requirements

2.6 Submit documents on time

2.7 Process and record the hearing outcomes in accordance with organisational and procedural requirements

2.8 Close and archive files in accordance with organisational and regulatory requirements

2.9 Keep fee-earners informed of actions taken, progress, developments and problems

2.10 Adhere to organisational policies and procedures, and legal and ethical requirements when managing case files

Assessment	assessor observation witness testimony candidate's proof of work worksheets assignments/projects/reports record of professional discussion record of oral and written questioning candidate and peer reports
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Administer the recruitment and selection process (A/506/1883)

Unit aim:

The learner will develop the specialist knowledge and skills they need to administer a range of business functions associated with the recruitment and selection of new employees within an organisation.

Unit content:

The learner will:

1. Understand the recruitment and selection process

The learner can:

- 1.1 Explain the different administrative requirements of internal and external recruitment
- 1.2 Describe the uses of a job description and a person specification
- 1.3 Explain the administrative requirements of different methods of selection
- 1.4 Explain the requirements of different pre-employment checks to be carried out
- 1.5 Explain what information needs to be communicated to successful and unsuccessful applicants at each stage of the recruitment and selection process
- 1.6 Explain the requirements of confidentiality, data protection and system security

The learner will:

2. Be able to administer the recruitment process

The learner can:

- 2.1 Check that the job or role details are correct and are in accordance with the brief
- 2.2 Place job advertisements in the agreed media in accordance with the timescales
- 2.3 Record applicant responses within the timescale
- 2.4 Provide requested information to applicants in accordance with organisational policies and procedures
- 2.5 Adhere to organisational policies and procedures, legal and ethical requirements

The learner will:

3. Be able to administer the selection process

The learner can:

- 3.1 Invite shortlisted applicants to participate in the selection process in accordance with organisational procedures
- 3.2 Co-ordinate selection arrangements in accordance with the brief
- 3.3 Carry out agreed pre-employment checks within the agreed timescale
- 3.4 Inform applicants of the outcome of their application in accordance with organisational policies and procedures
- 3.5 Keep selection records up-to-date

Assessment

assessor observation
candidate's proof of work
witness testimony
assignments/projects/reports
record of professional discussion
record of oral and written questioning
Recognition of Prior Learning (RPL)

Handle mail (D/506/1813)

Unit aim:

Learners will develop the specific knowledge and skills needed to effectively and efficiently sort and distribute incoming mail and collect, prepare and send outgoing mail.

Unit content:

The learner will:

1. Understand how to deal with mail

The learner can:

- 1.1 Explain how to deal with 'junk' mail
- 1.2 Describe what to do in the event of problems arising when dealing with incoming or outgoing mail
- 1.3 Describe how to operate a franking machine
- 1.4 Explain how to prepare packages for distribution
- 1.5 State organisational policies and procedures on mail handling, security and the use of courier services
- 1.6 Explain the process for reporting suspicious or damaged items in accordance with organisational procedures

The learner will:

2. Be able to deal with incoming mail

The learner can:

- 2.1 Sort incoming mail in line with organisational procedures
- 2.2 Distribute incoming mail and packages to the right people according to the agreed schedule
- 2.3 Deal with incorrectly addressed and 'junk' mail in accordance with organisational procedures

The learner will:

3. Be able to deal with outgoing mail

The learner can:

- 3.1 Organise the collection of outgoing mail and packages on time
- 3.2 Identify the best option for dispatching mail according to the required degree of urgency, size and value of the item
- 3.3 Dispatch outgoing mail on time

Assessment	assessor observation candidate's proof of work witness testimony assignments/projects/reports record of professional discussion record of oral and written questioning Recognition of Prior Learning (RPL)
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Organise business travel or accommodation (D/506/1875)

Unit aim:

Learners will develop the knowledge and skills they need to research business travel and accommodation options and make arrangements for travel and accommodation which meet the requirements of others.

Unit content:

The learner will:

1. Understand the organisation of business travel or accommodation for others

The learner can:

- 1.1 Explain any budgetary or policy constraints relating to business travel or accommodation
- 1.2 Describe financial arrangements relating to business travel or accommodation
- 1.3 Explain how to make arrangements for visas and related foreign travel documentation
- 1.4 Describe the procedures for obtaining or exchanging foreign currency

The learner will:

2. Be able to research business travel or accommodation options for others

The learner can:

- 2.1 Identify different suppliers that are capable of delivering the services required within budget
- 2.2 Recommend travel or accommodation arrangements that best meet the requirements
- 2.3 Recommend suppliers of travel or accommodation that best meet the requirements

The learner will:

3. Be able to make business travel or accommodation arrangements for others

The learner can:

- 3.1 Confirm the requirements for travel or accommodation
- 3.2 Agree arrangements that specify any limitations, prohibitions or responsibilities and which meet the requirements
- 3.3 Prepare and issue itinerary/schedule documentation that reflects agreed arrangements accurately
- 3.4 Obtain travel or accommodation documentation within the required timescale

3.5 Confirm the acceptability of payments to be made within the limits of their own authority

3.6 Keep up-to-date records of travel or accommodation arrangements and agreed commitments

3.7 Adhere to organisational policies and procedures, legal and ethical requirements when making business travel or accommodation arrangements for others

Assessment	assessor observation candidate's proof of work witness testimony assignments/projects/reports record of professional discussion record of oral and written questioning candidate and peer report Recognition of Prior Learning (RPL)
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Provide administrative support for meetings (H/506/1876)

Unit aim:

Learners will develop the skills required to provide administrative support before, during and after meetings.

Unit content:

The learner will:

1. Understand the administration of meetings

The learner can:

- 1.1 Describe the purpose of the meeting and who needs to attend
- 1.2 Explain why it is important to have a minimum number of attendees for a meeting
- 1.3 Explain ways to achieve maximum attendance at meetings
- 1.4 Explain the access, health, safety and security requirements relating to meetings
- 1.5 Describe how to set up the resources needed for a meeting
- 1.6 Explain the responsibilities of the meeting chair and meeting secretary
- 1.7 Explain the difference between formal and informal meetings
- 1.8 Explain the legal implications of formal meetings

The learner will:

2. Be able to make administrative preparations for meetings

The learner can:

- 2.1 Book meeting venue, resources and facilities in accordance with the brief
- 2.2 Collate documents needed for a meeting
- 2.3 Distribute meeting invitations, documents and other meeting-related requirements within the timescale
- 2.4 Confirm meeting attendees and any special requirements

The learner will:

3. Be able to support the administration of meetings

The learner can:

3.1 Take action to ensure that the equipment allocated for use at a meeting functions correctly

3.2 Provide support to meetings in accordance with requests

3.3 Ensure the venue is restored to the required conditions after the meeting

3.4 Distribute meeting records promptly to the agreed distribution list

3.5 Carry out any follow-up actions in accordance with the brief

Assessment

assessor observation
candidate's proof of work
witness testimony
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports
Recognition of Prior Learning (RPL)

Prepare text from notes using touch typing (K/506/1815)

Unit aim:

Learners will develop the knowledge and skills they need to produce text by touch typing from notes at the required speed and accuracy for different purposes.

Unit content:

The learner will:

1. Understand how to create text from notes

The learner can:

- 1.1 Explain the importance of confirming the purpose of the text and intended audience
- 1.2 Describe the problems that may occur in transcribing notes written by others
- 1.3 Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
- 1.4 Explain how technology features can help to create, format and check the accuracy of text
- 1.5 Describe ways of checking produced texts for accuracy and correctness
- 1.6 Describe organisational procedures for the storage, security and confidentiality of information

The learner will:

2. Be able to produce text using touch typing

The learner can:

- 2.1 Agree the purpose, format and deadlines for texts
- 2.2 Touch type texts at the speed and level of accuracy required by the organisation
- 2.3 Check that the text is accurate and the meaning is clear and correct
- 2.4 Store texts and original notes safely and securely following organisational procedures
- 2.5 Present texts in the required formats and within the agreed timescales

Assessment	assessor observation candidate's proof of work witness testimony assignments/projects/reports record of professional discussion record of oral and written questioning Recognition of Prior Learning (RPL)
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Contribute to the organisation of an event (L/506/1869)

Unit aim:

Learners will understand the roles and responsibilities needed to organise successful business events including event planning, sourcing a venue and resources, and setting up events. They will undertake follow-up activities to meet business requirements.

Unit content:

The learner will:

1. Understand event organisation

The learner can:

- 1.1 Explain the roles, responsibilities and accountabilities of individuals involved in the event
- 1.2 Explain the purpose and features of different types of events
- 1.3 Describe the type of resources needed for different types of events
- 1.4 Describe the different needs attendees may have and how to meet these
- 1.5 Explain the requirements of health, safety and security when organising events
- 1.6 Describe the types of problems that may occur during events and how to deal with them

The learner will:

2. Be able to carry out pre-event actions

The learner can:

- 2.1 Identify venue requirements for an event
- 2.2 Obtain resources within the agreed timescales
- 2.3 Distribute pre-event documentation to delegates in accordance with the event plan
- 2.4 Co-ordinate attendee responses within the agreed timescale
- 2.5 Identify any special requirements of event attendees

The learner will:

3. Be able to set up an event

The learner can:

3.1 Set up layout and resources in accordance with the event plan

3.2 Confirm that all identified resources are in place and meet requirements

3.3 Behave in a way that maintains organisational values and standards

The learner will:

4. Be able to carry out post-event actions

The learner can:

4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract

4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event

Assessment

assessor observation
candidate's proof of work
witness testimony
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports
Recognition of Prior Learning (RPL)

Employee rights and responsibilities (L/506/1905)

Unit aim:

Learners will develop knowledge of the rights and responsibilities of employees and employers and understand how occupations, business organisations, rights and responsibilities of others contribute to a safer workplace with improved working relationships.

Unit content:

The learner will:

1. Understand the role of organisations and industries

The learner can:

- 1.1 Explain the role of their own occupation within an organisation and industry
- 1.2 Describe career pathways within their organisation and industry
- 1.3 Identify sources of information and advice on an industry, occupation, training and career pathway
- 1.4 Describe an organisation's principles of conduct and codes of practice
- 1.5 Explain issues of public concern that affect an organisation and industry
- 1.6 Describe the types, roles and responsibilities of representative bodies and their relevance to their own role

The learner will:

2. Understand employers' expectations and employees' rights and obligations

The learner can:

- 2.1 Describe the employer and employee statutory rights and responsibilities that affect their own role
- 2.2 Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour
- 2.3 Describe the procedures and documentation that protect relationships with employees
- 2.4 Identify sources of information and advice on employment rights and responsibilities

Assessment

assignments/projects/reports
record of professional discussion
record of professional discussion
record of oral and written questioning
worksheet
Recognition of Prior Learning (RPL)

Prepare text from shorthand (M/506/1816)

Unit aim:

Learners will develop the knowledge and skills required to produce text from shorthand at the required speed and accuracy for different purposes.

Unit content:

The learner will:

1. Understand how to use shorthand to create text

The learner can:

- 1.1 Explain the importance of confirming the purpose of the text and intended audience
- 1.2 Describe techniques that may be used when taking shorthand notes
- 1.3 Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
- 1.4 Explain how technology features can help to create, format and check the accuracy of text
- 1.5 Describe ways of checking produced texts for accuracy and correctness
- 1.6 Describe organisational procedures for the storage, security and confidentiality of information

The learner will:

2. Be able to use shorthand to prepare text

The learner can:

- 2.1 Agree the purpose, format and deadlines for texts
- 2.2 Take dictation using shorthand at the speed required by the organisation
- 2.3 Input and format text from shorthand notes
- 2.4 Check that text is accurate and the meaning is clear and correct
- 2.5 Store texts and original notes safely and securely following organisational procedures
- 2.6 Present texts in the required formats and within the agreed timescales

Assessment	assessor observation candidate's proof of work witness testimony assignments/projects/reports record of professional discussion record of oral and written questioning Recognition of Prior Learning (RPL)
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Buddy a colleague to develop their skills (M/506/1895)

Unit aim:

Learners will develop the knowledge and skills they need to provide positive and constructive feedback to work colleagues and support their development of knowledge and skills for use in different situations.

Unit content:

The learner will:

1. Understand how to buddy a colleague

The learner can:

- 1.1 Describe what is expected of a buddy
- 1.2 Explain techniques to give positive feedback and constructive criticism
- 1.3 Explain techniques to establish rapport with a buddy

The learner will:

2. Be able to plan to buddy a colleague

The learner can:

- 2.1 Agree which aspects of a colleague's work may benefit from buddying
- 2.2 Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
- 2.3 Agree a schedule of meetings that minimises disruption to business
- 2.4 Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives

The learner will:

3. Be able to support a buddy colleague carrying out work activities

The learner can:

- 3.1 Remain unobtrusive while a buddy colleague carries out their work activities
- 3.2 Provide examples of how to carry out tasks correctly
- 3.3 Identify instances of good practice and areas for improvement through observation
- 3.4 Praise a buddy colleague on well-completed tasks
- 3.5 Give constructive feedback on ways in which a buddy could improve performance

3.6 Offer a buddy hints and tips based on personal experience

Assessment	assessor observation candidate's proof of work witness testimony assignments/projects/reports record of professional discussion record of oral and written questioning candidate and peer reports Recognition of Prior Learning (RPL)
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Store and retrieve information (R/506/1811)

Unit aim:

Learners will develop the knowledge and skills they need to use a range of information systems including paper-based and electronic systems as well as gaining an understanding of relevant legislation concerning storage and the communication of retrieved information.

Unit content:

The learner will:

1. Understand information storage and retrieval

The learner can:

- 1.1 Describe systems and procedures for storing and retrieving information
- 1.2 Outline legal and organisational requirements for information security and retention
- 1.3 Explain how to create filing systems to facilitate information identification and retrieval
- 1.4 Explain how to use different search techniques to locate and retrieve information
- 1.5 Describe what to do when problems arise when storing or retrieving information

The learner will:

2. Be able to gather and store information

The learner can:

- 2.1 Gather the information required within the agreed timescale
- 2.2 Store files and folders in accordance with organisational procedures
- 2.3 Store information in approved locations
- 2.4 Adhere to organisational policies and procedures, legal and ethical requirements

The learner will:

3. Be able to retrieve information

The learner can:

3.1 Confirm information to be retrieved and its intended use

3.2 Retrieve the required information within the agreed timescale

Assessment	assessor observation candidate's proof of work witness testimony assignments/projects/reports record of professional discussion record of oral and written questioning Recognition of Prior Learning (RPL)
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Administer parking dispensations (R/506/1887)

Unit aim:

Learners will understand the kind of situations where it's necessary to issue parking tickets. They will gain an understanding of the relevant legislation as well as develop the skills they need to gather and record key information.

Unit content:

The learner will:

1. Understand the administration of parking dispensations

The learner can:

- 1.1 Explain the scope and limits of their own responsibilities and authority in issuing parking dispensations
- 1.2 Describe the legal and regulatory requirements relating to parking dispensations
- 1.3 Describe the parking dispensation eligibility criteria and checks
- 1.4 Describe organisational security and anti-fraud policies, procedures and processes
- 1.5 Describe the features of software to manage the issue of permits, season tickets, suspensions, dispensations or waivers and Blue Badges
- 1.6 Explain where to go for help when dealing with parking dispensations

The learner will:

2. Be able to process applications for parking dispensations

The learner can:

- 2.1 Advise customers of the eligibility criteria for parking dispensations
- 2.2 Determine whether customers are eligible by matching the case to the criteria
- 2.3 Clarify any areas of doubt or confusion with customers
- 2.4 Carry out relevant checks in accordance with organisational procedures and legislative procedures
- 2.5 Record the reasons for the decision whether or not to grant parking dispensations
- 2.6 Maintain the requirements of confidentiality and data protection

The learner will:

3. Be able to issue parking dispensations

The learner can:

3.1 Communicate the decision and return related paperwork on parking dispensations to customers in accordance with organisational procedures

3.2 Process payments and refunds in accordance with organisational procedures

3.3 Keep records up-to-date

3.4 Adhere to organisational policies and procedures, legal and ethical requirements

Assessment

assessor observation
witness testimony
assignments/projects/reports
record of professional discussion
record of oral and written questioning
Recognition of Prior Learning (RPL)

Administer finance (R/506/1890)

Unit aim:

Learners will develop the specialist knowledge and skills they need to record income and expenditure, and process purchase orders, invoices and outgoing payments.

Unit content:

The learner will:

1. Understand finance for administrators

The learner can:

- 1.1 Describe organisational hierarchy and levels of authority for financial transactions
- 1.2 Explain organisational systems for sales invoicing, purchasing, payments and receipts
- 1.3 Describe the use of a purchase order, invoice, receipts and expenses

The learner will:

2. Be able to administer finance

The learner can:

- 2.1 Record income and expenditure in accordance with organisational policies and procedures
- 2.2 Process purchase orders, invoices or expenses in accordance with organisational policies and procedures
- 2.3 Process outgoing payments to the correct recipients
- 2.4 Accept or allocate incoming payments in accordance with organisational policies

Assessment

assessor observation
witness testimony
assignments/projects/reports
record of professional discussion
record of oral and written questioning
Recognition of Prior Learning (RPL)

Prepare text from recorded audio instruction (T/506/1817)

Unit aim:

Learners will develop the specialist knowledge and skills required to prepare the text instructions provided in audio recordings at the required speed and accuracy for different purposes.

Unit content:

The learner will:

1. Understand the preparation of text from recorded notes

The learner can:

- 1.1 Explain the importance of confirming the purpose of the text and intended audience
- 1.2 Describe the main features of the different types of technology that can be used for playing back recordings
- 1.3 Explain how different speaking styles of those giving dictation can affect outputs
- 1.4 Explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
- 1.5 Describe ways of checking produced texts for accuracy and correctness
- 1.6 Describe organisational procedures for the storage, security and confidentiality of information

The learner will:

2. Be able to prepare text from recorded notes

The learner can:

- 2.1 Agree the purpose, format and deadlines for texts
- 2.2 Input and format text from audio recording
- 2.3 Check that text is accurate and the meaning is clear and correct
- 2.4 Store texts and original recordings safely and securely following organisational procedures
- 2.5 Present texts in the required formats and within the agreed timescales

Assessment	assessor observation candidate's proof of work witness testimony assignments/projects/reports record of professional discussion record of oral and written questioning Recognition of Prior Learning (RPL)
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Administer human resource records (T/506/1879)

Unit aim:

Learners will develop the specialist knowledge and skills required to keep HR records up to date through the accurate and timely processing of information relating to human resources.

Unit content:

The learner will:

1. Understand the administration of human resource (HR) records

The learner can:

- 1.1 Explain what HR-related information needs to be kept and why
- 1.2 Explain the relationship of HR to other parts of an organisation
- 1.3 Describe the impact of other organisations on HR activities
- 1.4 Describe the features and uses of organisational systems for managing human resource information
- 1.5 Explain the requirements of confidentiality, data protection and system security
- 1.6 Describe the information to be provided for different management reports
- 1.7 Explain the limits of their own authority in administering HR records
- 1.8 Explain the implications of not keeping HR records up-to-date
- 1.9 Explain the actions to be taken in the event of problems arising or incomplete or inaccurate data

The learner will:

2. Be able to administer HR information

The learner can:

- 2.1 Keep HR records up-to-date
- 2.2 Process data in accordance with organisational procedures
- 2.3 Provide information within the limits of confidentiality
- 2.4 Adhere to organisational policies and procedures, legal and ethical requirements

Assessment

assessor observation
witness testimony
assignments/projects/reports
record of professional discussion
record of oral and written questioning
Recognition of Prior Learning (RPL)

Produce business documents (Y/506/1809)

Unit aim:

Learners will develop the knowledge and skills required to produce and distribute a range of business documents such as letters, emails and reports at the required level of accuracy for different purposes.

Unit content:

The learner will:

1. Understand how to prepare business documents

The learner can:

1.1 Explain the requirements for language, tone, image and presentation for different documents

1.2 Explain how to integrate images into documents

1.3 Describe how corporate identity impacts upon document production

1.4 Explain the requirements of data protection, copyright and intellectual property legislation relating to document production

1.5 Describe organisational procedures for version control

1.6 Describe security requirements relating to document production

The learner will:

2. Be able to prepare business documents

The learner can:

2.1 Identify the purpose, audience, content, style, format and deadlines of a document

2.2 Use document production resources in line with organisational guidelines

2.3 Use correct grammar, spelling, punctuation and sentence structure

2.4 Produce documents that meet the requirements within the agreed timescale

The learner will:

3. Be able to distribute business documents

The learner can:

3.1 Provide final documents in the appropriate medium for authorised readers

3.2 Specify restrictions and distribution lists in accordance with the requirements

3.3 Maintain the requirements of security in the production, distribution and storage of documents

Assessment

assessor observation
candidate's proof of work
witness testimony
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
Recognition of Prior Learning (RPL)

Produce minutes of meetings (Y/506/1812)

Unit aim:

Learners will develop the knowledge and skills they need to produce accurate minutes from notes taken during business meetings using the organisation's conventions.

Unit content:

The learner will:

1. Understand how to take minutes of meetings

The learner can:

- 1.1 Explain the purpose of different types of minutes and other meeting records
- 1.2 Explain the legal requirements of formal minutes
- 1.3 Describe organisational conventions for producing minutes
- 1.4 Describe the responsibilities of the minute taker in a meeting
- 1.5 Explain why it is important to maintain confidentiality of meetings, discussions and actions
- 1.6 Explain why it is necessary to record who proposed and seconded suggestions and changes

The learner will:

2. Be able to take notes of meetings

The learner can:

- 2.1 Take accurate notes of the attendance, proceedings, areas of discussion and agreed actions of meetings
- 2.2 Record allocated responsibilities for agreed actions

The learner will:

3. Be able to produce minutes of meetings

The learner can:

3.1 Transcribe notes accurately into meeting minutes using correct language, grammar, punctuation and sentence structure and in the agreed style

3.2 Include agreed attachments or appendices

3.3 Obtain approval for the final documents

3.4 Distribute minutes to the agreed distribution list

3.5 Maintain the requirements of confidentiality

Assessment

assessor observation
candidate's proof of work
witness testimony
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
Recognition of Prior Learning (RPL)

Resolve administrative problems (D/506/1956)

Unit aim:

The learner will identify the different types of information required from an administration system and analyse the level of risks if these systems are not functioning effectively. They will be able to identify problems with these systems and resolve them appropriately taking into consideration the timescales and resources needed.

Unit content:

The learner will:

1. Understand the principles underpinning the resolution of administrative problems

The learner can:

1.1 Evaluate the effectiveness of different types of information on an administrative function

1.2 Explain the basis for selecting tools, techniques and strategies to analyse administrative functions

1.3 Explain the constraints attached to the use of resources needed to resolve administrative problems

1.4 Explain how to apply risk assessment and management techniques to identify and resolve administrative problems

1.5 Analyse the effectiveness of different techniques used to resolve administrative problems

The learner will:

2. Be able to identify administrative problems

The learner can:

2.1 Collect information relevant to the administrative problem

2.2 Use analytical techniques that are appropriate to the administrative problem

2.3 Clarify whether an administrative problem is recurrent, intermittent or a sole instance

2.4 Identify patterns of issues and problems

2.5 Identify the likely cause of an administrative problem

The learner will:

3. Be able to resolve administrative problems

The learner can:

3.1 Select a strategy that is appropriate for the nature, scale, seriousness and priority of the administrative problem

3.2 Develop a plan that addresses the administrative problem whilst minimising disruption to business

3.3 Identify success criteria that are capable of measuring the effectiveness of solutions to solve administrative problems

3.4 Implement a problem-solving plan within the agreed timescale and constraints

3.5 Take action to ensure that systems and processes are capable of preventing future recurrences

3.6 Evaluate the effectiveness of problem-solving activities

3.7 Adhere to organisational policies and procedures, legal and ethical requirements when resolving administrative problems

Assessment

witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Prepare specifications for contracts (H/506/1957)

Unit aim:

The learner will research the requirements of procurement and tendering. They will confirm the requirements for a contract or tender and draft contract specifications, including selection criteria.

Unit content:

The learner will:

1. Understand the principles supporting the preparation of specifications for contracts

The learner can:

- 1.1 Explain the scope of contract specifications
- 1.2 Explain the roles and interests of those who should be involved in a tender process
- 1.3 Analyse the legal implications of a range of types of contracts and agreements
- 1.4 Explain the requirements of confidentiality and data protection
- 1.5 Evaluate the risks associated with procurement and tendering processes
- 1.6 Explain the basis for the design of a tender evaluation process

The learner will:

2. Be able to prepare specifications for contracts

The learner can:

- 2.1 Confirm the requirements for the contract specification
- 2.2 Draft contract specifications that meet the requirements including post-contractual requirements
- 2.3 Specify the parameters of the contract in line with the requirements
- 2.4 Provide sufficient information to enable potential suppliers to develop proposals that are capable of meeting the specification
- 2.5 Define objective selection criteria to evaluate tender proposals
- 2.6 Establish a selection process that meets organisational requirements

2.7 Adhere to organisational policies and procedures, legal and ethical requirements when preparing specifications for contracts

Assessment	witness testimony candidate's proof of work worksheets assignments/projects/reports record of professional discussion record of oral and written questioning candidate and peer reports
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Support environmental sustainability in a business environment (R/506/1954)

Unit aim:

Learners will describe current legislation and government initiatives which support environmental sustainability. They will identify what the corporate social responsibilities of a business are and implement best practice in their work environment.

Unit content:

The learner will:

1. Understand the principles supporting environmental sustainability in a business environment

The learner can:

1.1 Describe current legislation in relation to environmental sustainability in a business environment

1.2 Explain government incentives that support environmental sustainability in a business environment

1.3 Analyse the relationship between environmental sustainability and corporate social responsibility

1.4 Explain the health and safety considerations for environmental sustainability and waste management

1.5 Explain techniques to evaluate the impact of an organisation's environmental and sustainability policies and procedures

The learner will:

2. Be able to implement best practice in environmental sustainability in a business environment

The learner can:

2.1 Identify the environmental standards that are relevant to an organisation

2.2 Evaluate the impact of an organisation's business on its environment

2.3 Promote a culture of efficient consumption of energy in line with an organisation's energy management policies

2.4 Establish procedures to minimise waste and maximise the recycling of materials

2.5 Establish procedures to meet hazardous waste regulations

2.6 Adhere to organisational policies and procedures, legal and ethical requirements when implementing best practice in a business environment

Assessment

witness testimony
candidate's proof of work
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Administer legal files (J/506/1935)

Unit aim:

The learner will explain the administration requirements of different legal areas including organisational and regulatory requirements. They will maintain, close and archive records in accordance with organisational, legal and ethical requirements.

Unit content:

The learner will:

1. Understand the administration of legal files

The learner can:

- 1.1 Explain the administrative requirements of the different legal areas being administered
- 1.2 Explain the scope and limits of their own responsibilities and authority
- 1.3 Explain the requirements of the duty of confidentiality
- 1.4 Explain the use of specialist software for processing legal cases
- 1.5 Explain the potential consequences of inadequate or inaccurate record keeping
- 1.6 Describe the organisational and regulatory purpose and nature of different legal checks and searches
- 1.7 Explain the organisational and regulatory purpose of a client care letter
- 1.8 Explain how records of time spent on work are used

The learner will:

2. Be able to maintain a legal file

The learner can:

- 2.1 Confirm that information on file is complete, accurate and valid
- 2.2 Process money received from clients in accordance with organisational and regulatory requirements
- 2.3 Keep fee-earners informed of actions taken, progress, developments and problems
- 2.4 Take action to ensure that files are correctly labelled and dated including summaries of their contents

- 2.5 Generate correspondence that conforms with the requirements of house style
- 2.6 Record all time spent, costs and disbursements accurately
- 2.7 Generate accurate bills that conform with organisational and regulatory requirements
- 2.8 Adhere to organisational policies and procedures, and legal and ethical requirements when maintaining a legal file

The learner will:

3. Be able to close and archive a legal file

The learner can:

- 3.1 Address any outstanding issues for a legal file
- 3.2 Prepare accurate final bills in accordance with organisational and regulatory requirements
- 3.3 Take action to ensure that closed files contain all the necessary documentation
- 3.4 Confirm whether any documents need to be added to the firm's precedent, knowledge or data bank
- 3.5 Close files in accordance with organisational standards and procedures when the account shows a nil balance
- 3.6 Archive files in accordance with organisational and regulatory requirements

Assessment

assessor observation
 witness testimony
 candidate's proof of work
 assignments/projects/reports
 record of professional discussion
 record of oral and written questioning
 candidate and peer reports

Monitor information systems (F/506/1917)

Unit aim:

The learner will explain the use of information systems and identify any problems including those relating to confidentiality, accuracy or unsubstantiated information. They will need to know how to monitor systems and make recommendations for improvement.

Unit content:

The learner will:

1. Understand how information systems are used

The learner can:

- 1.1 Explain how the intended use of reports affects the choice of format and language
- 1.2 Explain how the audience of reports affects the choice of format and language
- 1.3 Explain the features of different problem-solving techniques related to information systems
- 1.4 Evaluate the suitability of possible problem-solving actions related to information systems
- 1.5 Explain techniques to validate the reliability of information
- 1.6 Analyse the suitability of different evaluation techniques related to information systems
- 1.7 Assess the potential consequences of breaches of confidentiality
- 1.8 Evaluate the potential consequences of publishing reports containing inaccurate or unsubstantiated information

The learner will:

2. Be able to monitor information systems

The learner can:

2.1 Develop a plan to monitor information systems that specifies objectives, scope, timescale, resource implications, the techniques to be used and reporting requirements

2.2 Carry out monitoring activities in accordance with the plan

2.3 Provide training and support to system users that is appropriate to their needs

2.4 Identify the cause of problems with an information system

2.5 Suggest solutions to problems with an information system

2.6 Recommend adaptations to the system in response to identified problems or developments

2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when monitoring information systems

Assessment

assessor observation
witness testimony
candidate's proof of work
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Maintain and issue stationery and supplies (Y/506/2295)

Unit aim:

Learners will develop the knowledge and skills they need to check stock levels, order and store stationery and supplies, and issue stock and stationery. They will keep records in line with organisational procedures.

Unit content:

The learner will:

1. Understand the maintenance of stationery and supplies

The learner can:

1.1 Describe organisational policies, procedures and levels of authority in maintaining supplies

1.2 Explain how to carry out a stock check of stationery

1.3 Describe the types of problems that may occur with deliveries and stock items

1.4 Explain how to deal with problems that occur with deliveries and stock items

1.5 Explain the factors to take into account when ordering stationery

1.6 Explain the benefits and limitations of different potential suppliers, against organisational requirements

1.7 Explain how to calculate quantities of stationery and supplies to be ordered

1.8 Describe how to dispose of or recycle waste

The learner will:

2. Be able to maintain stocks of stationery and supplies

The learner can:

2.1 Maintain stocks of stationery and supplies at the required levels

2.2 Maintain the requirements of storage and security

2.3 Carry out stock checks in accordance with organisational policies and procedures

2.4 Chase up late or incorrect orders with suppliers

The learner will:

3. Be able to issue stock of stationery and supplies

The learner can:

3.1 Issue stationery and supplies in accordance with organisational requirements

3.2 Maintain up-to-date records of stock issued, received and in storage

3.3 Deal with unwanted or damaged stationery and supplies safely

3.4 Recommend ways in which the system for receiving and issuing stock could be improved

Assessment

assessor observation
candidate's proof of work
witness testimony
assignments/projects/reports
record of professional discussion
record of oral and written questioning
Record of Prior Learning (RPL)

**OPTIONAL UNIT GROUP C. A
maximum of 10 credits can be
selected from this group:**

Manage team performance (A/506/1821)

Unit aim:

The learner will identify benchmarks which could be used to manage the performance of team members. They will allocate work to and monitor the quality of the work of team members, making sure they communicate clear objectives as well as give feedback on performance.

Unit content:

The learner will:

1. Understand the management of team performance

The learner can:

1.1 Explain the use of benchmarks in managing performance

1.2 Explain a range of quality management techniques to manage team performance

1.3 Describe constraints on the ability to amend priorities and plans

The learner will:

2. Be able to allocate and assure the quality of work

The learner can:

2.1 Identify the strengths, competences and expertise of team members

2.2 Allocate work on the basis of the strengths, competences and expertise of team members

2.3 Identify areas for improvement in team members' performance outputs and standards

2.4 Amend priorities and plans to take account of changing circumstances

2.5 Recommend changes to systems and processes to improve the quality of work

The learner will:

3. Be able to manage communications within a team

The learner can:

3.1 Explain to team members the lines of communication and authority levels

3.2 Communicate individual and team objectives, responsibilities and priorities

3.3 Use communication methods that are appropriate to the topics, audience and timescales

3.4 Provide support to team members when they need it

3.5 Agree with team members a process for providing feedback on work progress and any issues arising

3.6 Review the effectiveness of team communications and make improvements

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Participate in a project (F/506/1934)

Unit aim:

Learners will explain the stages of a project lifecycle as well as the roles of others involved. They will need to support the delivery of a project in the work environment and report on information, issues and potential problems.

Unit content:

The learner will:

1. Understand how to manage a project

The learner can:

1.1 Explain the features of a project business case

1.2 Explain the stages of a project lifecycle

1.3 Explain the roles of people involved in a project

1.4 Explain the uses of project-related information

1.5 Explain the advantages and limitations of different project monitoring techniques

1.6 Analyse the interrelationship of project scope, schedule, finance, risk, quality and resources

The learner will:

2. Be able to support the delivery of a project

The learner can:

2.1 Fulfil their role in accordance with a project plan

2.2 Collect project-related information in accordance with project plans

2.3 Use appropriate tools to analyse project information

2.4 Report on information analysis in the agreed format and timescale

2.5 Draw issues, anomalies and potential problems to the attention of project managers

2.6 Adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project

Assessment

witness testimony

candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Manage individuals' performance (J/506/1921)

Unit aim:

The learner will identify organisational policies and procedures relating to the underperformance of individuals in the workplace. They will manage the performance of others, including addressing underperformance, delegating work and inspiring motivation. They will support team members and recognise achievement.

Unit content:

The learner will:

1. Understand the management of underperformance in the workplace

The learner can:

1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance

1.2 Explain how to identify causes of underperformance

1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively

1.4 Explain how to address issues that hamper individuals' performance

1.5 Explain how to agree a course of action to address underperformance

The learner will:

2. Be able to manage individuals' performance in the workplace

The learner can:

2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives

2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge and development needs

2.3 Apply motivation techniques to maintain morale

2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards

2.5 Monitor individuals' progress towards objectives in accordance with agreed plans

2.6 Recognise individuals' achievement of targets and quality standards

2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Implement and maintain business continuity plans and processes (K/506/1930)

Unit aim:

The learner will describe the components of a business continuity plan and explain the features of various planning models. They will develop and maintain a plan including meeting their own objectives within that plan.

Unit content:

The learner will:

1. Be able to plan for the implementation of business continuity plans and processes

The learner can:

- 1.1 Describe the components of a business continuity plan
- 1.2 Explain the uses of a business continuity plan
- 1.3 Explain the features of different business continuity planning models
- 1.4 Explain the potential consequences of inadequate business continuity plans and processes
- 1.5 Confirm the required aim, scope and objectives of business continuity plans
- 1.6 Engage stakeholders in developing business continuity plans and processes
- 1.7 Identify business-critical products and/or services and the activities and resources that support them

The learner will:

2. Be able to implement business continuity plans and processes

The learner can:

2.1 Develop a framework for business continuity management

2.2 Recommend resources that are proportionate to the potential impact of business disruption

2.3 Communicate the importance and requirements of business continuity plans and processes to stakeholders

2.4 Meet their own objectives within the plan

The learner will:

3. Be able to maintain the fitness for purpose of on-going business continuity plans and processes

The learner can:

3.1 Provide training for staff who may be affected

3.2 Validate and test the strength of business continuity plans and processes

3.3 Update plans and processes in the light of feedback from business continuity exercises and other sources of information

Assessment

witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Manage individuals' development in the workplace (L/506/1922)

Unit aim:

The learner will understand the purpose of performance reviews and appraisals. They will carry out performance reviews and appraisals including the use of feedback, action planning and support for individuals as well as identify learning and development tools.

Unit content:

The learner will:

1. Be able to carry out performance appraisals

The learner can:

- 1.1 Explain the purpose of performance reviews and appraisals
- 1.2 Explain techniques to prepare for and carry out appraisals
- 1.3 Provide a private environment in which to carry out appraisals
- 1.4 Carry out performance reviews and appraisals in accordance with organisational policies and procedures
- 1.5 Provide clear, specific and evidence-based feedback sensitively
- 1.6 Agree future actions that are consistent with appraisal findings and identified development needs

The learner will:

2. Be able to support the learning and development of individual team members

The learner can:

- 2.1 Describe training techniques that can be applied in the workplace
- 2.2 Analyse the advantages and disadvantages of learning and development interventions and methods
- 2.3 Explain organisational learning and development policies and resource availability
- 2.4 Review individuals' learning and development needs at regular intervals
- 2.5 Suggest learning and development opportunities and interventions that are likely to meet individual and business needs

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Procure products and/or services (M/506/1928)

Unit aim:

The learner will determine the current and likely future purchasing needs for products and/or services of an organisation. They will select suppliers and buy products and/or services based on best value for money for the business.

Unit content:

The learner will:

1. Be able to identify procurement requirements

The learner can:

1.1 Explain current and likely future procurement requirements

1.2 Decide whether the purchase of products and/or services offers the organisation best value

1.3 Evaluate ethical and sustainability considerations relating to procurement

1.4 Justify the decision to buy products and/or services with evidence of an analysis of risk, costs and benefits

The learner will:

2. Be able to select suppliers

The learner can:

2.1 Explain the factors to be taken into account in selecting suppliers

2.2 Explain organisational procurement policies, procedures and standards

2.3 Explain the effect of supplier choice on the supply chain

2.4 Use appropriate media to publicise procurement requirements

2.5 Confirm the capability and track record of suppliers and their products and/or services

2.6 Select suppliers that meet the procurement specification

The learner will:

3. Be able to buy products and/or services

The learner can:

3.1 Explain the action to be taken in the event of problems arising

3.2 Agree contract terms that are mutually acceptable within their own scope of authority

3.3 Record agreements made, stating the specification, contract terms and any post-contract requirements

3.2 Adhere to organisational policies and procedures, legal and ethical requirements

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Promote equality, diversity and inclusion in the workplace (T/506/1820)

Unit aim:

The learner will differentiate between the terms equality, diversity and inclusion and explain the impact and implications that these have across an organisation. They will describe the roles and responsibilities for equality and diversity and what constitutes good practice.

Unit content:

The learner will:

1. Understand the organisational aspects of equality, diversity and inclusion in the workplace

The learner can:

1.1 Explain the difference between equality, diversity and inclusion

1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy

1.3 Explain the potential consequences of breaches of equality legislation

1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion

The learner will:

2. Understand the personal aspects of equality, diversity and inclusion in the workplace

The learner can:

2.1 Explain the different forms of discrimination and harassment

2.2 Describe the characteristics of behaviour that support equality, diversity and inclusion in the workplace

2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace

The learner will:

3. Be able to support equality, diversity and inclusion in the workplace

The learner can:

3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace

3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace

3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace

Assessment

witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Implement change (T/506/1929)

Unit aim:

The learner will explain the importance of leadership when implementing change. They will explore different models of change and identify what barriers and contingency plans these models might bring. They will plan, manage and evaluate change in the workplace.

Unit content:

The learner will:

1. Understand the principles of change management

The learner can:

- 1.1 Explain the importance of effective leadership when implementing change
- 1.2 Explain the role of internal and external stakeholders in the management of change
- 1.3 Evaluate the suitability of change management models for different contexts
- 1.4 Explain how to assess the business risks associated with change
- 1.5 Assess the need for contingency planning when implementing change
- 1.6 Assess the need for crisis management when implementing change
- 1.7 Explain the different types of barriers to change and how to deal with these
- 1.8 Explain how to evaluate change management projects

The learner will:

2. Be able to plan the implementation of change

The learner can:

- 2.1 Explain the need for change
- 2.2 Explain the potential consequences of not implementing change
- 2.3 Explain the roles and responsibilities of a change management project team
- 2.4 Develop a plan that includes specific, measurable, achievable, realistic and time-bound (SMART) objectives and resources
- 2.5 Brief team members on their roles and responsibilities and the objectives of the change
- 2.6 Gain acceptance to the need for change from team members and other stakeholders

The learner will:

3. Be able to manage the implementation of a change plan

The learner can:

- 3.1 Explain organisational escalation processes for reporting problems
- 3.2 Analyse the advantages and disadvantages of monitoring techniques
- 3.3 Implement the plan within the agreed timescale
- 3.4 Provide support to team members and other stakeholders according to identified needs
- 3.5 Monitor the progress of the implementation against the plan
- 3.6 Manage problems in accordance with contingency plans

The learner will:

4. Be able to evaluate the effectiveness of the implementation of change plans

The learner can:

- 4.1 Assess the suitability of techniques used to analyse the effectiveness of change
- 4.2 Collate valid feedback and information from stakeholders
- 4.3 Analyse feedback and information against agreed criteria
- 4.4 Identify areas for future improvement
- 4.5 Communicate the lessons learned with those who may benefit

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Chair and lead meetings (Y/506/1924)

Unit aim:

The learner will prepare for meetings, following any formal requirements for documentation. They will chair meetings and facilitate the process to make sure everyone has the opportunity to contribute and that agreed actions are reached and monitored.

Unit content:

The learner will:

1. Be able to prepare to lead meetings

The learner can:

- 1.1 Identify the type, purpose, objectives and background to a meeting
- 1.2 Identify those individuals expected and those required to attend a meeting
- 1.3 Prepare for any formal procedures that apply to a meeting
- 1.4 Describe ways of minimising likely problems in a meeting
- 1.5 Take action to ensure that meeting documentation is prepared correctly and distributed to the agreed people within the agreed timescale

The learner will:

2. Be able to chair and lead meetings

The learner can:

- 2.1 Follow business conventions in the conduct of a meeting
- 2.2 Facilitate meetings so that everyone is involved and the optimum possible consensus is achieved
- 2.3 Manage the agenda within the timescale of the meeting
- 2.4 Summarise the agreed actions, allocated responsibilities, timescales and any future arrangements

The learner will:

3. Be able to deal with post-meeting matters

The learner can:

3.1 Take action to ensure that accurate records of a meeting are produced and distributed in the agreed format and timescale

3.2 Take action to ensure that post-meeting actions are completed

3.3 Evaluate the effectiveness of a meeting and identify points for future improvement

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Bespoke software (J/502/4397)

Unit aim:

The learner will input and link information across different software applications. They will create, change and modify systems to make sure information is retrieved efficiently and presented clearly.

Unit content:

The learner will:

1. Input and combine information using bespoke software

The learner can:

1.1 Input relevant information accurately so that it is ready for processing

1.2 Select and use appropriate techniques to link and combine information within the application and across different software applications

The learner will:

2. Create and modify appropriate structures to organise and retrieve information efficiently

The learner can:

2.1 Evaluate the use of software functions to structure, layout and style information

2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently

2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data, where available

The learner will:

3. Exploit the functions of the software effectively to process and present information

The learner can:

3.1 Select and use appropriate tools and techniques to edit, analyse and format information

3.2 Check information meets needs, using IT tools and making corrections as necessary.

3.3 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs

3.4 Select and use presentation methods to aid clarity and meaning

Assessment

assessor observation
witness testimony
candidate's proof of work
record of professional discussion
record of oral and written questioning

Spreadsheet software (J/502/4626)

Unit aim:

The learner will use a spreadsheet to enter numerical and other data accurately, and will combine and link data from other sources. They will select and use a range of functions to summarise, analyse and present the data.

Unit content:

The learner will:

1. Use a spreadsheet to enter, edit and organise numerical and other data

The learner can:

1.1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured

1.2 Enter and edit numerical and other data accurately

1.3 Combine and link data from different sources

1.4 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available

The learner will:

2. Select and use appropriate formulas and data analysis tools and techniques to meet requirements

The learner can:

2.1 Explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them

2.2 Select and use a wide range of appropriate functions and formulas to meet calculation requirements

2.3 Select and use a range of tools and techniques to analyse and interpret data to meet requirements

2.4 Select and use forecasting tools and techniques

The learner will:

3. Use tools and techniques to present, and format and publish spreadsheet information

The learner can:

3.1 Explain how to present and format spreadsheet information effectively to meet needs

3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively

3.3 Select and use appropriate tools and techniques to generate, develop and format charts and graphs

3.4 Select and use appropriate page layout to present, print and publish spreadsheet information

3.5 Explain how to find and sort out any errors in formulas

3.6 Check spreadsheet information meets needs, using IT tools and making corrections as necessary

3.7 Use auditing tools to identify and respond appropriately to any problems with spreadsheets

Assessment

assessor observation
witness testimony
candidate's proof of work
record of professional discussion
record of oral and written questioning

Database software (T/502/4556)

Unit aim:

The learner will create and modify multiple tables and use a range of database tools, and enter, edit and organise information to help with the formatting of data. /They will create and run reports to meet requests.

Unit content:

The learner will:

1. Plan, create and modify relational database tables to meet requirements

The learner can:

- 1.1 Explain how a relational database design enables data to be organised and queried
- 1.2 Plan and create multiple tables for data entry with appropriate fields and properties
- 1.3 Set up and modify relationships between database tables
- 1.4 Explain why and how to maintain data integrity
- 1.5 Respond appropriately to problems with database tables
- 1.6 Use database tools and techniques to ensure data integrity is maintained

The learner will:

2. Enter, edit and organise structured information in a database

The learner can:

- 2.1 Design and create forms to access, enter, edit and organise data in a database
- 2.2 Select and use appropriate tools and techniques to format data entry forms
- 2.3 Check data entry meets needs, using IT tools and making corrections as necessary
- 2.4 Respond appropriately to data entry errors

The learner will:

3. Use database software tools to create, edit and run data queries and produce reports

The learner can:

3.1 Explain how to select, generate and output information from queries according to requirements

3.2 Create and run database queries to display, amend or calculate selected data

3.3 Plan and produce database reports from a multiple-table relational database

3.4 Select and use appropriate tools and techniques to format database reports

3.5 Check reports meet needs, using IT tools and making corrections as necessary

Assessment

assessor observation
witness testimony
candidate's proof of work
record of professional discussion
record of oral and written questioning

Word processing software (Y/502/4629)

Unit aim:

The learner will enter and combine text to create word processing documents, as well as create and modify documents by combining and merging information from a range of sources. They will use word processing tools to format and present documents to meet quality standards and business needs.

Unit content:

The learner will:

1. Enter and combine text and other information accurately within word processing documents

The learner can:

1.1 Summarise what types of information are needed for the document and how they should be linked or integrated

1.2 Use appropriate techniques to enter text and other types of information accurately and efficiently

1.3 Create, use and modify appropriate templates for different types of documents

1.4 Explain how to combine and merge information from other software or multiple documents

1.5 Combine and merge information within a document from a range of sources

1.6 Store and retrieve document and associated files effectively, in line with local guidelines and conventions where available

1.7 Select and use tools and techniques to work with multiple documents or users

1.8 Customise interface to meet needs

The learner will:

2. Create and modify appropriate layouts, structures and styles for word processing documents

The learner can:

2.1 Analyse and explain the requirements for structure and style

2.2 Create, use and modify columns, tables and forms to organise information

2.3 Define and modify styles for document elements

2.4 Select and use tools and techniques to organise and structure long documents

The learner will:

3. Use word processing software tools and techniques to format and present documents effectively to meet requirements

The learner can:

3.1 Explain how the information should be formatted to aid meaning

3.2 Select and use appropriate techniques to format characters and paragraphs

3.3 Select and use appropriate page and section layouts to present and print multi-page and multi-section documents

3.4 Check documents meet needs, using IT tools and making corrections as necessary

3.5 Evaluate the quality of the documents produced to ensure they are fit for purpose

3.6 Respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Using email (T/502/4301)

Unit aim:

The learner will compose and format email messages including attachments and the use of an address book. They will manage their email system to include reading and responding appropriately, and using automated responses and archiving.

Unit content:

The learner will:

1. Use email software tools and techniques to compose and send messages

The learner can:

- 1.1 Select and use software tools to compose and format email messages, including attachments
- 1.2 Explain methods to improve message transmission
- 1.3 Send email messages to individuals and groups
- 1.4 Explain why and how to stay safe and respect others when using email
- 1.5 Use an address book to manage contact information

The learner will:

2. Manage use of email software effectively

The learner can:

- 2.1 Develop and communicate guidelines and procedures for using email effectively
- 2.2 Read and respond appropriately to email messages and attachments
- 2.3 Use email software tools and techniques to automate responses
- 2.4 Explain why, how and when to archive messages
- 2.5 Organise, store and archive email messages effectively
- 2.6 Customise email software to make it easier to use
- 2.7 Explain how to minimise email problems
- 2.8 Respond appropriately to email problems

Assessment

assessor observation
witness testimony
candidate's proof of work
record of professional discussion
record of oral and written questioning

Organise and deliver customer service (L/506/2150)

Unit aim:

The learner will be able to identify and meet customer wants, needs and expectations throughout the whole customer journey. They will be able to plan for and meet the needs of customers, taking into consideration resources, priorities and organisational needs.

Unit content:

The learner will:

1. Understand how to organise customer service delivery

The learner can:

- 1.1 Explain how different methods of promoting products and/or services impact on customer service delivery
- 1.2 Explain who should be involved in the organisation of customer service delivery
- 1.3 Explain the importance of differentiating between customers' wants, needs and expectations
- 1.4 Explain different ways of segmenting customer groups
- 1.5 Explain how customer segmentation is used to organise customer service delivery
- 1.6 Explain how to analyse the 'customer journey'

The learner will:

2. Be able to plan the delivery of customer service

The learner can:

- 2.1 Identify customers' needs and expectations
- 2.2 Map the 'customer journey'
- 2.3 Confirm that systems and structures are in place to enable the delivery of agreed standards of customer service
- 2.4 Prepare the resources needed to deliver products and/or services to different types of customers
- 2.5 Plan how to deal with unexpected additional workloads

2.6 Allocate priorities to address points of service failure

The learner will:

3. Be able to deliver customer service

The learner can:

3.1 Take steps to ensure that the needs of customers are balanced with organisational objectives

3.2 Agree realistic and achievable actions with customers

3.3 Identify areas for improvement in their own customer service delivery

3.4 Adapt their own customer service delivery to meet customers' changing expectations

Assessment

assessor observation
witness testimony
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worksheets
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candidate and peer reports

Resolve customers' complaints (R/506/2151)

Unit aim:

The learner will monitor customer complaints and analyse the resolution of complaints following organisational policies and procedure. They will demonstrate how to negotiate with customers, deal with any potential conflict, and agree and manage resolutions.

Unit content:

The learner will:

1. Understand the monitoring and resolution of customers' complaints

The learner can:

- 1.1 Assess the suitability of a range of monitoring techniques for customers' complaints
- 1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery
- 1.3 Explain negotiating techniques used to resolve customers' complaints
- 1.4 Explain conflict management techniques used in dealing with upset customers
- 1.5 Explain organisational procedures for dealing with customer complaints
- 1.6 Explain when to escalate customers' complaints
- 1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint
- 1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services

The learner will:

2. Be able to deal with customers' complaints

The learner can:

- 2.1 Confirm the nature, cause and implications of customers' complaints
- 2.2 Take personal responsibility for dealing with complaints
- 2.3 Communicate in a way that recognises customers' problems and understands their points of view
- 2.4 Explain the advantages and limitations of different complaint response options to customers
- 2.5 Explain the advantages and limitations of different complaint response options to the organisation
- 2.6 Keep customers informed of progress
- 2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority
- 2.8 Record the outcome of the handling of complaints for future reference
- 2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
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candidate and peer reports

Manage a budget (A/506/1995)

Unit aim:

The learner will describe the business planning and budget-setting cycle and explain what the financial requirements of a business are. They will identify the importance and procedures for budget-setting and use a budget to control performance and expenditure.

Unit content:

The learner will:

1. Understand how to identify financial requirements

The learner can:

- 1.1 Explain how to calculate the estimated costs of activities, resources and overheads needed to achieve objectives
- 1.2 Analyse the components of a business case to meet organisational requirements
- 1.3 Analyse the factors to be taken into account to secure stakeholder support stakeholders
- 1.4 Describe the business planning and budget-setting cycle

The learner will:

2. Understand how to set budgets

The learner can:

- 2.1 Explain the purposes of budget-setting
- 2.2 Analyse the information needed to enable realistic budgets to be set
- 2.3 Explain how to address contingencies
- 2.4 Explain organisational policies and procedures on budget-setting

The learner will:

3. Be able to manage a budget

The learner can:

- 3.1 Use the budget to control performance and expenditure
- 3.2 Identify the cause of variations from budget
- 3.3 Explain the actions to be taken to address variations from budget
- 3.4 Propose realistic revisions to budget, supporting recommendations with evidence
- 3.5 Provide budget-related reports and information within agreed timescales
- 3.6 Explain the actions to be taken in the event of suspected instances of fraud or malpractice

The learner will:

4. Be able to evaluate the use of a budget

The learner can:

- 4.1 Identify successes and areas for improvement in budget management
- 4.2 Make recommendations to improve future budget setting and management

Assessment

witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
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candidate and peer reports

Develop and maintain professional networks (J/506/1949)

Unit aim:

The learner will describe the interpersonal skills needed for networking and evaluate the role of the internet to assist with business networking. They will select, maintain and exit networks based on current and future benefits, their aspirations and relevance.

Unit content:

The learner will:

1. Understand the principles of effective networking

The learner can:

- 1.1 Describe the interpersonal skills needed for effective networking
- 1.2 Explain the basis on which to choose networks to be developed
- 1.3 Evaluate the role of shared agendas and conflict management in relationship-building
- 1.4 Evaluate the role of the internet in business networking
- 1.5 Assess the importance of following up leads and actions
- 1.6 Analyse ethical issues relating to networking activities

The learner will:

2. Be able to identify professional networks for development

The learner can:

- 2.1 Identify potential networks for professional development from an analysis of their benefits compared with individual needs and aspirations
- 2.2 Shortlist networks for development against defined criteria
- 2.3 Assess the benefits and limitations of joining and maintaining selected network(s)

The learner will:

3. Be able to maintain professional networks

The learner can:

3.1 Identify the potential for mutual benefit with network members

3.2 Promote their own skills, knowledge and competence to network members

3.3 Provide information, services or support to network members where the potential for mutual benefit has been identified

3.4 Establish the boundaries of confidentiality

3.5 Agree guidelines for the exchange of information and resources

3.6 Take action to ensure that participation in networks reflects current and defined future aspirations and needs

3.7 Make introductions to people with common or complementary interest to and within networks

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
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candidate and peer reports

Manage physical resources (K/506/1989)

Unit aim:

The learner will identify resource needs to meet operational requirements. They will develop a business case for the physical resources they need to seek authorisation for expenditure. They will manage the use of physical resources making sure they meet what was requested and make recommendations for further improvement.

Unit content:

The learner will:

1. Be able to identify the need for physical resources

The learner can:

- 1.1 Identify resource requirements from analyses of organisational needs
- 1.2 Evaluate alternative options for obtaining physical resources
- 1.3 Evaluate the impact on the organisation of introducing physical resources
- 1.4 Identify the optimum option that meets operational requirements for physical resources

The learner will:

2. Be able to obtain physical resources

The learner can:

- 2.1 Develop a business case for physical resources that is supported by evidence, cost estimates, contingency arrangements and an analysis of likely benefits
- 2.2 Obtain authorisation and financial commitment for the required expenditure
- 2.3 Negotiate best value from contracts in accordance with organisational standards and procedures
- 2.4 Adhere to organisational policies and procedures, legal and ethical requirements when obtaining physical resources
- 2.5 Check that the physical resources received match those ordered

The learner will:

3. Be able to manage the use of physical resources

The learner can:

3.1 Take action to ensure physical resources are used in accordance with manufacturers' instructions

3.2 Evaluate the efficiency of physical resources against agreed criteria

3.3 Recommend improvements to the use of physical resources and associated working practices

3.4 Analyse the benefits of effective equipment in the conservation of energy and the environment

Assessment

witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
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candidate and peer reports

Prepare for and support quality audits (K/506/1992)

Unit aim:

The learner will understand the principles of quality management including quality standards. They will prepare for and support quality audits to meet organisational objectives including the development of a quality improvement plan to address any issues raised.

Unit content:

The learner will:

1. Understand the principles underpinning the management of quality

The learner can:

1.1 Analyse the principles of quality management

1.2 Analyse the purpose and requirements of a range of quality standards

1.3 Analyse the advantages and limitations of a range of quality techniques

1.4 Assess how the management of quality contributes to the achievement of organisational objectives

The learner will:

2. Be able to prepare for quality audits

The learner can:

2.1 Establish the quality requirements applicable to the work being audited

2.2 Confirm that documentation is complete

2.3 Confirm that any previously agreed actions have been implemented

2.4 Make available information requested in advance by auditors

The learner will:

3. Be able to support quality audits

The learner can:

3.1 Provide access to information on request within scope of the audit

3.2 Agree actions and timescales with auditors that will remedy non-conformance or non-compliance

3.3 Identify instances where business processes, quality standards and/or procedures could be improved

3.4 Develop a quality improvement plan that addresses the issues raised

Assessment

witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
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candidate and peer reports

Manage business risk (L/506/2004)

Unit aim:

The learner will identify business risk by referring to a range of theories and models. They will highlight potential risks, assess the possible consequences, and explain measures and techniques to minimise those risks. They will develop and implement risk management plans in accordance with organisational requirements.

Unit content:

The learner will:

1. Understand the management of business risk

The learner can:

- 1.1 Explain what is meant by business risk
- 1.2 Analyse business risk identification theories and models
- 1.3 Explain measures and techniques to mitigate business risk
- 1.4 Explain their own level of authority in managing risk

The learner will:

2. Be able to address business risk

The learner can:

- 2.1 Monitor work in line with organisational risk procedures
- 2.2 Identify potential risks using agreed risk criteria
- 2.3 Assess identified risks, their potential consequences and the probability of them happening
- 2.4 Communicate to stakeholders the likelihood of the risk occurring and its potential consequences
- 2.5 Explain organisational business risk management policies

The learner will:

3. Be able to mitigate business risk

The learner can:

3.1 Develop risk management plans and processes that are proportionate to the risk and the available resources

3.2 Implement risk management plans in accordance with organisational requirements

3.3 Monitor on-going risk-related developments and amend plans in the light of changing circumstances

3.4 Keep stakeholders informed of any developments and their possible consequences

3.5 Evaluate the effectiveness of actions taken, identifying possible future improvements

Assessment

witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Manage a project (R/506/1999)

Unit aim:

The learner will plan a project in line with organisational procedures, and explain how a project should be managed, evaluating project management tools and techniques. They will manage and monitor a project throughout its lifecycle, allocating resources, communicating with others and closing the project following evaluation.

Unit content:

The learner will:

1. Understand the management of a project

The learner can:

- 1.1 Explain how to carry out a cost–benefit analysis for a project
- 1.2 Evaluate the use of risk analysis techniques
- 1.3 Evaluate project planning and management tools and techniques
- 1.4 Evaluate the impact of changes to project scope, schedule, finance, risk, quality and resources
- 1.5 Analyse the requirements of project governance arrangements

The learner will:

2. Be able to plan a project

The learner can:

- 2.1 Analyse how a project fits with an organisation’s overall vision, objectives, plans and programmes of work
- 2.2 Agree the objectives and scope of proposed projects with stakeholders
- 2.3 Assess the interdependencies and potential risks within a project
- 2.4 Develop a project plan with specific, measurable, achievable, realistic and time-bound (SMART) objectives, key performance indicators (KPIs) and evaluation mechanisms appropriate to the plan
- 2.5 Develop proportionate and targeted plans to manage identified risks and contingencies
- 2.6 Apply project lifecycle approaches to the progress of a project

The learner will:

3. Be able to manage a project

The learner can:

- 3.1 Allocate resources in accordance with the project plan
- 3.2 Brief project team members on their roles and responsibilities
- 3.3 Implement plans within agreed budgets and timescales
- 3.4 Communicate the requirements of the plans to those who will be affected
- 3.5 Revise plans in the light of changing circumstances in accordance with project objectives and identified risks
- 3.6 Keep stakeholders up-to-date with developments and problems
- 3.7 Complete close-out actions in accordance with project plans
- 3.8 Adhere to organisational policies and procedures, legal and ethical requirements when managing a project

4 Be able to evaluate the effectiveness of a project

- 4.1 Conduct periodic reviews of the progress and effectiveness of a project using information from a range of sources
- 4.2 Evaluate the effectiveness of capturing and managing project-related knowledge
- 4.3 Report on the effectiveness of plans

Assessment

assessor observation
witness testimony
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worksheets
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candidate and peer reports

Develop and implement an operational plan (Y/506/1955)

Unit aim:

The learner will explain the components of an operational plan including the link between strategy and operation. They will develop an operational plan that is aligned to other business processes and which includes SMART targets. They will implement the plan, making any necessary changes and keeping others informed.

Unit content:

The learner will:

1. Understand the principles of operational planning

The learner can:

- 1.1 Evaluate the use of risk analysis techniques in operational planning
- 1.2 Explain the components of an operational plan
- 1.3 Analyse the relationship between strategic and operational plans
- 1.4 Evaluate the use of planning tools and techniques in the operational planning process
- 1.5 Explain how to carry out a cost–benefit analysis

The learner will:

2. Be able to develop an operational plan

The learner can:

- 2.1 Identify specific, measurable, achievable, realistic and time-bound (SMART) objectives and key performance indicators (KPIs)
- 2.2 Identify evaluation mechanisms appropriate to the plan
- 2.3 Take action to ensure that plans are consistent with organisational strategy, objectives, values, policies and procedures
- 2.4 Develop proportionate and targeted plans to manage identified risks
- 2.5 Take action to ensure that plans complement and maximise synergy with other business areas
- 2.6 Adhere to organisational policies and procedures, legal and ethical requirements

The learner will:

3. Be able to implement an operational plan

The learner can:

3.1 Implement plans within agreed budgets and timescales

3.2 Communicate the requirements of the plans to those who will be affected

3.3 Revise plans in the light of changing circumstances in accordance with strategic objectives and identified risks

The learner will:

4. Be able to evaluate the effectiveness of an operational plan

The learner can:

4.1 Conduct periodic reviews of the progress and effectiveness of the plans, using information from a range of sources

4.2 Report on the effectiveness of operational plans in the appropriate format

Assessment

witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

Encourage innovation (J/506/2292)

Unit aim:

The learner will identify opportunities for innovation and work with others to contribute to suggestions for development and improvement. They will test ideas for potential risk, before implementing change and identifying the most effective costings, processes and systems.

Unit content:

The learner will:

1. Be able to identify opportunities for innovation

The learner can:

- 1.1 Analyse the advantages and disadvantages of techniques used to generate ideas
- 1.2 Explain how innovation benefits an organisation
- 1.3 Explain the constraints on their own ability to make changes
- 1.4 Agree with stakeholders terms of reference and criteria for evaluating potential innovation and improvement
- 1.5 Engage team members in finding opportunities to innovate and suggest improvements
- 1.6 Monitor performance, products and/or services and developments in areas that may benefit from innovation
- 1.7 Analyse valid information to identify opportunities for innovation and improvement

The learner will:

2. Be able to generate and test ideas for innovation and improvement

The learner can:

- 2.1 Generate ideas for innovation or improvement that meet the agreed criteria
- 2.2 Test selected ideas that meet viability criteria
- 2.3 Evaluate the fitness for purpose and value of the selected ideas
- 2.4 Assess potential innovations and improvements against the agreed evaluation criteria

The learner will:

3. Be able to implement innovative ideas and improvements

The learner can:

3.1 Explain the risks of implementing innovative ideas and improvements

3.2 Justify conclusions of efficiency and value with evidence

3.3 Prepare costings and schedules of work that will enable efficient implementation

3.4 Design processes that support efficient implementation

Assessment

assessor observation
witness testimony
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worksheets
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Website software (Y/502/4632)

Unit aim:

The learner will determine the requirements for a website and plan the most appropriate templates, content, features and style. They will use website software and tools to develop the content and make the website accessible for users, before publishing and testing the website to identify potential problems and resolutions.

Unit content:

The learner will:

1. Create structures and styles and use them to produce websites

The learner can:

1.1 Determine what website content and layout will be needed for each page and for the site

1.2 Plan and create web page templates to layout content

1.3 Select and use website features and structures to enhance website navigation and functionality

1.4 Create, select and use styles to enhance website consistency and readability

1.5 Provide guidance on laws, guidelines and constraints that affect the content and use of websites

1.6 Explain what access issues may need to be taken into account

1.7 Explain when and why to use different file types for saving content

1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available

The learner will:

2. Select and use website software tools and features to develop multiple page websites with multimedia and interactive features

The learner can:

2.1 Prepare content for web pages so that it is ready for editing and formatting

2.2 Organise and combine information needed for web pages in line with any copyright constraints, including across different software

2.3 Select and use appropriate editing and formatting techniques to aid meaning

2.4 Select and use appropriate programming and development techniques to add features and enhance websites

2.5 Select and use file formats that make information easier to download

2.6 Check web pages meet needs, using IT tools and making corrections as necessary

The learner will:

3. Publish and test multiple page websites with multimedia and interactive features

The learner can:

3.1 Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned

3.2 Identify any quality problems with websites and explain how to respond to them

3.3 Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently

3.4 Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose

Assessment

assessor observation
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Presentation software (T/502/4623)

Unit aim:

The learner will create content for presentation slides, using software to develop the presentation so that it meets the needs of the user, has the desired impact and complies with organisational requirements. They will present an interactive slideshow and make changes to ensure it meets quality standards and is fit for purpose.

Unit content:

The learner will:

1. Input and combine text and other information within presentation slides

The learner can:

1.1 Explain what types of information are required for the presentation

1.2 Enter text and other information using layouts appropriate to type of information

1.3 Insert charts and tables and link to source data

1.4 Insert images, video or sound to enhance the presentation

1.5 Identify any constraints which may affect the presentation

1.6 Organise and combine information for presentations in line with any constraints

1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available

The learner will:

2. Use presentation software tools to structure, edit and format presentations

The learner can:

2.1 Explain when and how to use and change slide structure and themes to enhance presentations

2.2 Create, amend and use appropriate templates and themes for slides

2.3 Explain how interactive and presentation effects can be used to aid meaning or impact

2.4 Select and use appropriate techniques to edit and format presentations to meet needs

2.5 Create and use interactive elements to enhance presentations

2.6 Select and use animation and transition techniques appropriately to enhance presentations

The learner will:

3. Prepare an interactive slideshow for presentation

The learner can:

- 3.1 Explain how to present slides to communicate effectively for different contexts
- 3.2 Prepare interactive slideshow and associated products for presentation
- 3.3 Check presentation meets needs, using IT tools and making corrections as necessary
- 3.4 Evaluate presentations, identify any quality problems and discuss how to respond to them
- 3.5 Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose

Assessment

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witness testimony
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Recruitment, selection and induction practice (R/506/2909)

Unit aim:

The learner will identify the factors that impact on the recruitment and selection process and explain how this informs both the recruitment and the induction process. They will select individuals following organisational and legislative guidelines, and induct them into the organisation through identifying their particular needs and any support requirements.

Unit content:

The learner will:

1. Understand the principles and theories underpinning recruitment, selection and induction practice

The learner can:

- 1.1 Explain workforce planning techniques
- 1.2 Describe the information needed to identify recruitment requirements
- 1.3 Assess the impact of an organisation's structure and culture on its recruitment and selection policies and practices
- 1.4 Analyse the factors involved in establishing recruitment and selection criteria
- 1.5 Evaluate the suitability of different recruitment and selection methods for different roles
- 1.6 Analyse patterns of employment that affect the recruitment of staff
- 1.7 Explain the factors to be taken into account when developing job specifications, personal specifications and job advertisements
- 1.8 Explain the induction process
- 1.9 Explain the relationship between human resource processes and the induction processes

The learner will:

2. Be able to recruit people into an organisation

The learner can:

- 2.1 Determine current staffing needs
- 2.2 Identify current skills needs from identified staffing needs
- 2.3 Identify future workforce needs
- 2.4 Develop a resourcing plan that addresses identified needs within budgetary limitations
- 2.5 Evaluate the cost-effectiveness of different methods of recruitment for an identified role
- 2.6 Explain how recruitment policies and practices meet legal and ethical requirements
- 2.7 Select the most appropriate method of recruitment for identified roles

The learner will:

3. Be able to select appropriate people for the role

The learner can:

- 3.1 Plan assessment processes that are valid and reliable
- 3.2 Provide those involved in the selection process with sufficient information to enable them to make informed decisions
- 3.3 Justify assessment decisions with evidence
- 3.4 Inform applicants of the outcome of the process in line with organisational procedures
- 3.5 Evaluate the effectiveness of the selection process
- 3.6 Adhere to organisational policies and procedures, legal and ethical requirements when carrying out selection assessments

The learner will:

4. Be able to induct people into an organisation

The learner can:

- 4.1 Develop induction materials that meet operational and new starters' needs
- 4.2 Explain to new starters organisational policies, procedures and structures
- 4.3 Explain to new starters their role and responsibilities
- 4.4 Explain to new starters their entitlements and where to go for help
- 4.5 Assess new starters' training needs
- 4.6 Confirm that training is available that meets operational and new starters' needs
- 4.7 Provide support that meets new starters' needs throughout the induction period

Assessment

assessor observation
witness testimony
candidate's proof of work
worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning
candidate and peer reports

**OPTIONAL UNIT GROUP D. A
maximum of 8 credits can be selected
from this group:**

Principles of digital marketing and research (F/502/9937)

Unit aim:

The learner will explain the role of digital marketing and a variety of other applications, such as search engine optimisation (SEO) and how it can be effective. The learner will describe the potential of a customer relationship management (CRM) system and other digital technologies for marketing purposes.

Unit content:

The learner will:

1. Understand the role and requirements of digital marketing

The learner can:

- 1.1 Explain the role of digital marketing within the overall marketing strategy
- 1.2 Explain the strengths and weaknesses of digital marketing for different marketing applications
- 1.3 Explain the importance of targeted digital marketing
- 1.4 Describe the sources of data lists for use in targeting customers and potential customers
- 1.5 Explain the legal requirements and implications of digital marketing
- 1.6 Describe the design requirements of data capture and reporting systems for digital marketing
- 1.7 Explain the importance of evaluating the impact of digital marketing activities

The learner will:

2. Understand the principles of search engine optimisation (SEO)

The learner can:

- 2.1 Explain the importance of search engine optimisation
- 2.2 Describe how to calculate the cost-efficiency of SEO
- 2.3 Explain the use of Meta Tags, website codes and keywords
- 2.4 Explain the use of offsite SEO in optimising marketing effectiveness
- 2.5 Explain the design principles of response systems
- 2.6 Explain the advantages and disadvantages of links to other websites

The learner will:

3. Understand the principles of marketing research using the internet

The learner can:

- 3.1 Explain the scope for customising search-related internet facilities to enable the identification and retrieval of targeted information
- 3.2 Explain the advantages and disadvantages of different data mining techniques
- 3.3 Explain how to use multiple-table relational databases
- 3.4 Explain how to ensure the validity and reliability of information retrieved from the internet

The learner will:

4. Understand the principles of digital marketing device and message design

The learner can:

- 4.1 Explain the potential uses of a customer relationship management (CRM) system
- 4.2 Explain the design requirements of a CRM system
- 4.3 Describe the characteristics of an effective digital marketing device
- 4.4 Describe the characteristics of an effective digital response system
- 4.5 Explain the requirements, advantages and disadvantages of different tracking systems
- 4.6 Explain how to overcome the barriers posed by non-interoperable technologies

The learner will:

5. Understand how to use digital technology for marketing purposes

The learner can:

- 5.1 Explain the implications for use of digital technology of campaigns that are aimed at retention, acquisition and conversion
- 5.2 Explain methods of managing digital databases including permission marketing and the application of suppressions/opt-outs
- 5.3 Explain the advantages and disadvantages of different digital technologies and combination of technologies for a range of marketing applications

Assessment

worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Principles of marketing stakeholder relationships (J/502/9938)

Unit aim:

The learner will identify how and why relationships with stakeholders are established and developed in relation to the marketing strategy of an organisation. They will highlight what benefits and potential conflicts these relationships may bring and be able to manage and communicate with stakeholders accordingly.

Unit content:

The learner will:

1. Understand marketing stakeholder relationships

The learner can:

1.1 Explain the basis on which the need for marketing stakeholder relationships are identified and prioritised

1.2 Explain the use of stakeholder mapping in developing ways of building relationships

1.3 Describe the nature of interest of different stakeholder groups and how this affects the nature of relationships and communications

1.4 Explain the significance of stakeholders to the achievement of the overall marketing strategy

1.5 Describe the features of the market in which stakeholders operate

1.6 Describe how to establish stakeholders' attitudes to an organisation

1.7 Describe actual and potential synergies and conflicts between clients and other stakeholders

The learner will:

2. Understand how to build and manage marketing stakeholder relationships

The learner can:

2.1 Explain how to identify common goals and potential synergy between stakeholders and an organisation

2.2 Explain the importance of engaging stakeholders in marketing activities

- 2.3 Explain the basis upon which stakeholder communications plans are developed
- 2.4 Explain the requirements of a competitor management strategy
- 2.5 Explain the importance of agreeing common objectives with clients
- 2.6 Describe the scope of generalist and specialist personnel that can be deployed in support of building long- term relationships with clients

The learner will:

3. Understand how to monitor and control marketing stakeholder relationships

The learner can:

- 3.1 Explain the use of key performance indicators and success criteria in monitoring the effectiveness of stakeholder relationships
- 3.2 Describe methods of monitoring the on-going effectiveness of stakeholder relationships
- 3.3 Explain the importance of effective stakeholder communications and feedback systems
- 3.4 Explain how changes in the market environment in which stakeholders operate may have an impact on relationships
- 3.5 Explain how to develop strategies and plans that address changing stakeholder attitudes and needs
- 3.6 Explain how to develop reporting systems that meet agreed success criteria
- 3.7 Explain the importance of reviewing the effectiveness of collaborative arrangements with stakeholders

Assessment

worksheets
 assignments/projects/reports
 record of professional discussion
 record of oral and written questioning

Principles of market research (K/502/9933)

Unit aim:

The learner will identify what is required when designing and interpreting market research. They will consider factors such as sources of evidence, resource requirements and the quality, validity and reliability of data.

Unit content:

The learner will:

1. Understand the basis on which market research is commissioned

The learner can:

1.1 Describe how to identify the need for market research and the sources of evidence to support this

1.2 Describe the basis for scoping the research and identifying linkages, interdependencies and the possible impact of one element on others

1.3 Explain how to set research parameters, aims and evaluation criteria

1.4 Explain the importance of involving stakeholders in the definition of research to be carried out

1.5 Explain how to evaluate different options for conducting the research

The learner will:

2. Understand how to design market research projects

The learner can:

2.1 Explain how to set research objectives, timescales, budget and resource requirements, and success criteria

2.2 Explain how to specify the characteristics and size of the sample to be researched in accordance with the research aims and objectives

2.3 Describe the factors to be taken into account when selecting research instruments that are fit for purpose

2.4 Explain how to ensure the suitability of methods chosen to conduct research

2.5 Explain the strengths and limitations of quantitative and qualitative research

- 2.6 Explain how risks inherent in market research may be addressed
- 2.7 Explain how to ensure that research data collected is valid and reliable
- 2.8 Describe the uses of the research outputs
- 2.9 Explain how to obtain approval to the proposed research

The learner will:

3. Understand the principles of marketing data collection

The learner can:

- 3.1 Explain the difference between primary and secondary research and how this affects data collection methods and interpretation
- 3.2 Describe the importance of using research instruments correctly
- 3.3 Explain the role of data collection in a market research project
- 3.4 Explain how to address problems arising in data collection (e.g., insufficiency of representative sample, unreliable or invalid data)
- 3.5 Explain the importance of accurate data collection and recording
- 3.6 Explain marketing data storage, security and access requirements

The learner will:

4. Understand the principles of marketing data interpretation and evaluation

The learner can:

- 4.1 Explain the volume of data needed to ensure statistical confidence
- 4.2 Explain how to evaluate the quality, reliability and validity of market research data
- 4.3 Describe the uses of market research
- 4.4 Explain the application, strengths and weaknesses of different data analysis methods
- 4.5 Explain the use of statistical tools to identify trends, causes and correlations in marketing data
- 4.6 Explain the strengths and weaknesses of different data evaluation methods
- 4.7 Explain the basis on which to reach conclusions as to the usefulness of the research

Assessment

worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Principles of marketing and evaluation (T/502/9935)

Unit aim:

The learner will define a range of market segments and explain how marketing should be aligned to customer requirements. They will describe various factors which contribute to customer behaviour and also consider how to assess market opportunities as well as develop a marketing strategy.

Unit content:

The learner will:

1. Understand the principles of market segmentation

The learner can:

1.1 Explain the importance of defining market segments to the development and achievement of the marketing strategy

1.2 Explain the difference between market segments and customer classification

1.3 Explain how the characteristics, motivations and behaviours of potential target customers are identified

1.4 Explain how to cluster customers with similar characteristics

1.5 Describe how to confirm that proposed segments are real, distinctive, viable and their buying power measurable

1.6 Explain how to evaluate the profitability and stability of market segments

1.7 Describe how a range of products may appeal to different market segments

1.8 Explain the motivators and inhibitors that influence customer behaviour

1.9 Explain the use of Customer Relationship Management

The learner will:

2. Understand how to assess market opportunities for new products and/or services

The learner can:

2.1 Describe the economic and buyer behavioural factors to be taken into account when assessing new market opportunities

2.2 Describe the cultural factors that are likely to affect customers' perceptions of products and/or services and sales performance

2.3 Explain how to identify opportunities and threats in new markets and for new products in existing markets

2.4 Explain how competitor and potential competitor activity may affect projected sales performance

2.5 Explain the basis of recommendations to exploit new market opportunities

The learner will:

3. Understand the principles of marketing strategy development

The learner can:

3.1 Describe the topics to be addressed in a marketing strategy

3.2 Explain the use of market analyses to inform the development of a marketing strategy

3.3 Explain how to evaluate risks to the achievement of objectives

3.4 Describe how to forecast sales by product and/or service

3.5 Explain how to present a marketing strategy including aims, objectives, actions, accountabilities, resources, budgets and forecasts

3.6 Explain the importance of engaging stakeholders in the development of a marketing strategy

3.7 Explain the significance of customer loyalty to the achievement of marketing objectives and strategy

3.8 Explain how to set performance indicators and evaluation arrangements that are capable of measuring returns on investment

The learner will:

4. Understand how to evaluate the effectiveness of a marketing strategy

The learner can:

- 4.1 Explain the importance of conducting the evaluation in accordance with the specification
- 4.2 Describe the factors to be taken into account in the evaluation of the effectiveness of a marketing strategy
- 4.3 Explain the strengths and weaknesses of different evaluation methods
- 4.4 Describe how to identify trends and themes from evaluation data
- 4.5 Explain how to ensure the reliability and validity of evaluation data
- 4.6 Explain how to achieve an acceptable level of statistical confidence
- 4.7 Explain how to address critical issues revealed by evaluation
- 4.8 Explain the importance of justifying recommendations and conclusions with evidence
- 4.9 Explain the use of impact analysis in the evaluation process
- 4.10 Explain the importance of marketing to the achievement of business objectives and strategies
- 4.11 Describe the links between corporate social responsibility and marketing strategies

Assessment

worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Understand the customer service environment (Y/506/2152)

Unit aim:

The learner will explain the process of delivering effective customer service and measure the success of an organisation in achieving this. They will explain what a brand means to a customer and review a range of customer service models and customer service standards.

Unit content:

The learner will:

1. Understand the concepts and practices underpinning customer service delivery

The learner can:

1.1 Explain the value of customer service as a competitive tool

1.2 Explain the process of mapping the customer journey and its importance in delivering effective customer service

1.3 Describe techniques used to identify service failures

1.4 Explain the concept and importance of the service profit chain

1.5 Describe methods of measuring organisational effectiveness in the delivery of customer service

The learner will:

2. Understand the relationship between customer service and a brand

The learner can:

2.1 Explain the importance of a brand to customers and to an organisation

2.2 Explain how branding can influence customers' perception of an organisation and its products and/or services

2.3 Explain the potential impact of good and poor customer service on a brand

The learner will:

3. Understand the structure of customer service

The learner can:

- 3.1 Explain the features of different customer service models and customer service standards
- 3.2 Explain the relationship between customer service and operational areas of an organisation
- 3.3 Explain the relationship between customer service and continuous improvement processes
- 3.4 Explain the costs and benefits of customer service to an organisation
- 3.5 Explain the impact of organisational values on how customers create their expectations
- 3.6 Explain how organisational values impact on meeting customer expectations

The learner will:

4. Understand the implications of legislation on customer service delivery

The learner can:

- 4.1 Explain the implications of consumer-related legislation on customer service delivery
- 4.2 Explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information

Assessment

worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Understand the legal context of business (D/506/1939)

Unit aim:

The learner will describe the legal requirements of different businesses including government departments and agencies, and will be able to explain what a governing body does and their requirements for financial reporting. They will identify legislation and contracting requirements which impact upon a business when trading with others and when employing others.

Unit content:

The learner will:

1. Understand the legal framework within which businesses operate

The learner can:

1.1 Explain the legal requirements of different types of business

1.2 Describe the roles and powers of government departments and agencies in regulating business

1.3 Explain the legal provisions relating to intellectual property

The learner will:

2. Understand the principles of business governance

The learner can:

2.1 Explain the corporate governance statutory framework of a business

2.2 Explain the roles and responsibilities of an organisation's governing body

2.3 Explain the financial reporting requirements of an organisation

The learner will:

3. Understand how contract law affects a business

The learner can:

3.1 Explain the elements of a valid business contract

3.2 Analyse different types of contracts

3.3 Explain the difference between negligence and liability

3.4 Explain the liabilities and entitlements of sellers and purchasers of goods and services

The learner will:

4. Understand the requirements of employment law

The learner can:

4.1 Describe the sources, institutions and enforcement systems for individual employment rights

4.2 Explain the features of types of worker and employment contracts for service

4.3 Explain the implications of contracts of service and contracts for service

4.4 Explain the implications of different types of employment status

4.5 Explain the requirements for an organisation for health and safety

4.6 Explain the requirements for an organisation for equality and diversity

4.7 Explain the implications for an organisation of wrongful dismissal, unfair dismissal and redundancy

4.8 Describe the impact of human rights legislation on the employment relationship

Assessment

worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning

Principles of social media within a business (R/503/9324)

Unit aim:

The learner will identify how social media could fit into the marketing plan of different types of business to help them achieve business goals and objectives. They will identify a range of social media tools and channels and match these to the needs of an audience, and explain how to measure the success of social media for a business and the impact and consequences it might have.

Unit content:

The learner will:

1. Understand how Social Media fits into the objectives and marketing of a business

The learner can:

1.1 Describe a business and its type, vision, aims, objectives and goals

1.2 Identify the brand and values of a business and how these are portrayed to the audience of a business

1.3 Describe the marketing tools available to a business

1.4 Explain the consequences of using Social Media on the budget of different sizes and types of business

1.5 Explain the benefits and consequences of encouraging amplification

1.6 Explain the benefits and consequences of encouraging engagement

1.7 Explain the factors to consider when identifying a Social Media plan for a business

1.8 Explain how Social Media could fit into the marketing plan of a business

The learner will:

2. Understand how to select Social Media tools and channels for a business

The learner can:

2.1 Describe the different tools and channels that can be used for Social Media

2.2 Describe the features and benefits of the different tools and channels that can be used for social media

2.3 Identify the potential type of audience for each different tool and channel that can be used for social media

2.4 Explain the factors to consider when selecting different tools and channels for social media

2.5 Evaluate different tools and channels for Social Media for business use

The learner will:

3. Understand how to measure the success of using social media tools and channels

The learner can:

3.1 Explain the importance of measuring the outcomes of using different Social Media tools and channels

3.2 Explain why SMARTER targets should be set for different Social Media tools and channels

3.3 Describe the methods a business can use to measure and identify success of different Social Media tools and channels

3.4 Describe what success could look like when using different Social Media tools and channels for different types and sizes of business

The learner will:

4. Understand how social media policy and guidelines can affect a business

The learner can:

4.1 Describe the components of a business's social media policy and guidelines

4.2 Explain the importance of having a social media policy and guidelines

4.3 Explain the importance of having a reputation management policy

4.4 Describe the benefits of managing perception changes in a business's reputation

4.5 Describe how to manage perception changes in a business's reputation

The learner will:

5. Be able to monitor how a business is using Social Media

The learner can:

5.1 Explain the importance of knowing how similar businesses or industries are using Social Media

5.2 Explain how to monitor the ways similar businesses or industries are using Social Media

5.3 Monitor how a business is using Social Media

5.4 Identify improvements to a business's use of Social Media

Assessment	worksheets assignments/projects/reports record of professional discussion record of oral and written questioning
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Principles of leadership and management (F/506/2596)

Unit aim:

The learner will explain how effective decision-making contributes to the quality of work and targets of a business. They will appreciate how management styles can affect workforce performance and motivation, and determine the manager's areas of responsibility for planning, co-ordinating and controlling work.

Unit content:

The learner will:

1. Understand the principles of effective decision-making

The learner can:

- 1.1 Explain the importance of defining the objectives, scope and success criteria of the decisions to be taken
- 1.2 Assess the importance of analysing the potential impact of decision-making
- 1.3 Explain the importance of obtaining sufficient valid information to enable effective decision-making
- 1.4 Explain the importance of aligning decisions with business objectives, values and policies
- 1.5 Explain how to validate information used in the decision-making process
- 1.6 Explain how to address issues that hamper the achievement of targets and quality standards

The learner will:

2. Understand leadership styles and models

The learner can:

- 2.1 Explain the difference in the influence of managers and leaders on their teams
- 2.2 Evaluate the suitability and impact of different leadership styles in different contexts
- 2.3 Analyse theories and models of motivation and their application in the workplace

The learner will:

3. Understand the role, functions and processes of management

The learner can:

- 3.1 Analyse a manager's responsibilities for planning, coordinating and controlling work
- 3.2 Explain how managers ensure that team objectives are met
- 3.3 Explain how a manager's role contributes to the achievement of an organisation's vision, mission and objectives
- 3.4 Analyse theories and models of management
- 3.5 Explain how the application of management theories guide a manager's actions
- 3.6 Explain the operational constraints imposed by budgets

The learner will:

4. Understand performance measurement

The learner can:

- 4.1 Explain the relationship between business objectives and performance measures
- 4.2 Explain the features of a performance measurement system
- 4.3 Explain how to set key performance indicators (KPIs)
- 4.4 Explain the tools, processes and timetable for monitoring and reporting on business performance
- 4.5 Explain the use of management accounts and management information systems in performance management
- 4.6 Explain the distinction between outcomes and outputs

Assessment

worksheets
assignments/projects/reports
record of professional discussion
record of oral and written questioning



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