

Skillsfirst Awards

handbook

Level 3 Diploma in Business Administration (QCF)

BUSD3



Skillsfirst
growth through learning

Contents	Page
Section 1 – Introduction	2
Section 2 – Skillsfirst Awards Limited	
2.1 Data protection	2
2.2 Equality and accessibility	2
2.3 Enquiries and information sources	3
2.4 Complaints and appeals	3
2.5 Malpractice and maladministration	4
Section 3 – The sector skills council for ICT	
3.1 SkillsCfA	4
3.2 Requirements of those who assess performance, and moderate and verify assessments	5
3.3 Employer direct model	6
3.4 Continuous professional development	6
Section 4 – Summary of assessment methods	
4.1 Evidence from workplace performance	6
4.2 Characteristics of assessment guidance	7
4.3 Simulation and witness testimony	8
4.4 Recognition of prior learning (RPL)	8
Section 5 – Qualification information	
5.1 What is the qualification and credit framework (QCF)	9
5.2 QCF units	10
5.3 QCF terminology	10
5.4 Availability of qualifications	10
5.5 Qualification aim and design	10
Section 6 – Qualification structure	
6.1 Number of credits required for this qualification	10
6.2 The rules of combination	11
6.3 List of available units and their credit value	11
6.4 Learner entry requirements	14
6.5 Progression opportunities	15
Section 7 – The units of learning	
7.1 Structure of the units	16
7.2 Group M – mandatory units	17
7.3 Group A – optional units	34
7.4 Group B – optional units	151
7.5 Group C – optional units	235

1.0 Introduction

- 1.1 Skillsfirst Awards is an awarding organisation specialising in the provision of vocational qualifications across a range of occupational areas.
- 1.2 Skillsfirst Awards recognises the need for industry to have fully trained and qualified staff – reliably qualified to recognised industry standards.
- 1.3 The following handbook provides the learning outcomes and assessment strategy for the delivery of the Level 3 Diploma in Business Administration (QCF). The handbook is a live document and will be updated should there be any incremental change made. Centres will be informed electronically when changes are made and it will be the responsibility of any recognised centre to ensure the most up to date version of the handbook is used. The document also provides details of the administrative procedures, requirements and responsibilities that are associated with the delivery of vocational qualifications.

The handbook is available on the Skillsfirst Awards website www.skillsfirst.co.uk

- 1.4 This document is copyright but can be copied by any of our recognised centres for the purpose of assessing learners and may also be copied by learners for their own use.
- 1.5 All learners should be provided with a copy of the Skillsfirst qualification handbook together with the Skillsfirst learner guide. This document can be found on our web-site at www.skillsfirst.co.uk

2.0 Skillsfirst Awards

2.1 Data protection

Skillsfirst Awards takes the protection of data seriously and to this end has developed a data protection statement outlining how Skillsfirst and our centres, comply with the current legislation on data protection. It is important for centres to read our statement and ensure that our requirements are put in place. It is particularly important that centres make learners aware that data is shared with Skillsfirst Awards. Our policy statement on this and data requirements can be found in our centre handbook on our website www.skillsfirst.co.uk

2.2 Equality and accessibility

Equality and accessibility

Skillsfirst is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation and EU directives including the Equality Act 2010 (Amendment) Order 2012 and to ensure this occurs, has in place a policy on equality and accessibility which can be found on our website www.skillsfirst.co.uk and within our centre handbook.

Skillsfirst will ensure that centres use a equality and accessibility policy that works together with ours and that they maintain an effective appeals procedure which along with the equality and accessibility policy, will be monitored by the external verifier. We expect centres to tell learners how to find and use their own equality and accessibility and appeals procedures.

Access to assessment

Skillsfirst Awards is committed to guaranteeing all learners are treated fairly and equally and to ensure this occurs, has in place a policy on reasonable adjustments and special considerations. This policy states clearly what centres can and in some cases must, put in place to assist learners who may have particular requirements.

We expect centres to tell learners how to find and use their own reasonable adjustments and special considerations policy and will monitor implementation through the external verification process. This policy can be accessed at www.skillsfirst.co.uk and within our centre handbook. Further advice on this policy and its application can be obtained from our customer services team at customerservices@skillsfirst.co.uk

2.3 Enquiries and information sources

Skillsfirst aims to provide accurate information in a variety of formats and media. Recognised centres are encouraged to make enquiries to the customer services team, or seek clarification from our website. Learners wishing to enquire about qualifications, aspects of qualifications or quality assurance policies and procedures are encouraged, in the first instance, to seek information from the recognised centre or their tutor/assessor. Where a satisfactory answer is unavailable, learners are encouraged to seek clarification from our website, or from the Skillsfirst customer services team.

As a guide, the majority of frequently requested information is available on our website or on request via the electronic helpline listed below.

Website: www.skillsfirst.co.uk

email: customerservices@skillsfirst.co.uk

Tel: 0121 270 5100

Fax: 0121 747 4102

In writing to:

Customer Services
Skillsfirst Awards Limited
Suite 215
Fort Dunlop
Fort Parkway
Birmingham
B24 9FD

2.4 Complaints and appeals

Complaints

Skillsfirst Awards will endeavour at all times to satisfy our customer's needs and ensure a quality service. There may be times when our centres do not feel we have met these needs. Should they wish, centres may complain in writing to the Skillsfirst Awards customer services manager. We will attempt to resolve all complaints within the published timescales and will record and review all complaints as part of our ongoing customer service commitment.

Appeals

Skillsfirst Awards aims to ensure that at all times its decisions are fair, consistent and based on valid judgements. However, it is recognised that there may be occasions when a centre or a learner may wish to question a decision made. Skillsfirst Awards therefore has an appeals policy and process which clearly indicates the rights of the centre and the learner to appeal against a range of decisions taken by Skillsfirst.

The Skillsfirst Awards appeals policy and process can be accessed on our website www.skillsfirst.co.uk and within our centre handbook. Centres are required to have a documented policy and procedure which allows learners to question decisions made by the centre. The final stage of such a procedure may be to appeal to the Skillsfirst Awards external verifier. This policy would form part of the original centre recognition process and its implementation will be monitored by the external verifier.

2.5 Malpractice and maladministration

Skillsfirst Awards has a responsibility to ensure that malpractice and maladministration is addressed effectively and to publish procedures to centres for dealing with malpractice on the part of learners, centre staff and any others involved in providing the qualification. To meet this requirement, Skillsfirst Awards has a malpractice policy and process, the details of which can be accessed on our website www.skillsfirst.co.uk

3.0 The sector skills council for customer service

3.1 SkillsCfA

The Level 3 Diploma in Business Administration (QCF) is based on the units developed by SkillsCfA who are the sector skills council for customer service. Their contact details are:

SkillsCfA
6 Graphite Square
Vauxhall
London
SE11 5EE

Tel: 0207 091 9620
info@skillscfa.org

This handbook provides details from e-skills assessment strategy, which centres will need to apply in order to assess and quality assure the Level 3 Diploma in Business Administration (QCF) and includes the:

- requirements of those who assess performance, and moderate and verify assessments
- continuous professional development
- summary of assessment methods

The complete assessment strategy is available for view and to download from the e-skills website www.skillscfa.org

3.2 Requirements of those who assess performance, and moderate and verify assessments

Assessors

The primary responsibility of an assessor is to assess candidates' performance in a range of tasks and to ensure the evidence for the competence of knowledge based skills submitted by the candidate meets the requirements of the assessment criteria. It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in depth technical understanding related to the qualifications for which they are assessing candidates. It will be the responsibility of the approved centre to select and appoint assessors.

Assessors should:

- hold (or be working towards) an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence based units and qualifications. Assessors working towards an appropriate qualification must get their decisions countersigned by a suitably qualified assessor/verifier. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;
- be “occupationally competent” or have the necessary and sufficient experience of the role for which they intend to undertake assessments, including the level and scope of individual candidate performance at work or in RWEs; and judgements about the quality of assessment and the assessment process.

Internal quality assurer (IQA/IV)

A primary responsibility of an IQA/IV is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQA/IV s therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQA/IVs

Potential IQA/IVs should:

- hold (or be working towards) an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence based assessments and candidates. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA1. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards.
- be “occupationally competent or have the necessary and sufficient experience of the role for which they intend to verify assessments. This experience will provide potential verifiers with detailed knowledge of the functions described by the occupational standards that comprise the qualification and will also allow them to make judgements about the quality of assessment and the assessment process.

3.3 Employer direct model

SkillsCFA encourages the use of an employer direct model. The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process.

In order to use this employer direct model:

An organisation must:

- have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; **OR**
- seek guidance and approval from an awarding organisation to demonstrate that they have:
 - appropriate processes in place to facilitate assessment, moderation or verification functions
 - carried out 100% mapping of the trainer, supervisor or managers assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.
- agree the mapping process with the awarding organisation/body involved
- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

Skillsfirst will:

- offer this model to employers only and
- supply information on the requirements for internal and external moderation/verification activities to assessment centres.

3.4 Continuous professional development

Centres are responsible for ensuring that assessors and IVs plan and maintain their CPD.

Centres are expected to support their assessors and IVs in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

Centres may have generic criteria and personnel specifications in addition to the above.

4.0 Summary of assessment methods

For this qualification, learners will be required to provide a portfolio of evidence for **each** unit.

4.1 Evidence from workplace performance

- Evidence of occupational competence of all units at any level should be generated and collected through performance under workplace conditions. This includes competence units which have knowledge learning outcomes and assessment criteria.

- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

4.2 Characteristics of assessment guidance

The learner may produce evidence from a range of examples which should be recorded in some form. A record of evidence will confirm to the assessor their confidence in the learner's breadth and depth of knowledge and understanding in being able to competently meet the functional requirements of all the units.

The assessor will need to be assured that the learner can:

- meet all the learning outcomes of a unit
- pass all the assessment criteria of a unit

An assessor may request additional evidence if they are not satisfied with the evidence presented by the learner. If this occurs, it may need to be agreed in partnership with the learner and the assessor.

Professional discussion

Professional discussion is encouraged as a supplementary form of evidence to confirm a learner's competence. Such discussions should not be based on a prescribed list of questions but be a structured discussion which enables the assessor to gather relevant evidence to ensure the learner has a firm understanding of the standard being assessed.

Realistic working environment (RWE)

It is essential that organisations wishing to operate a RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment. To undertake the assessment in a RWE the following guidelines must be met:

- the RWE is managed as a real work situation;
- assessment must be carried out under realistic business pressures;
- all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations;
- candidates must be expected to achieve a volume of work comparable to normal business practices;
- the range of services, products, tools, materials and equipment that the candidates use must be up to date and available;
- account must be taken of any legislation or regulations in relation to the type of work that is being carried out;
- candidates must be given workplace responsibilities to enable them to meet the requirements of the units;
- customer perceptions of the RWE is similar to that found in the work situation being represented;
- candidates must show that their productivity reflects those found in the work situation being represented

4.3 Simulation and witness testimony

Simulation or witness testimony is warranted where the centre can demonstrate that performance evidence has been impossible to obtain in the work environment.

Simulation

- Simulation can be applied to all Level 1 units.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in Appendix A.
- Units which have been imported by Skills CFA into their apprenticeships or competence-based qualifications will be assessed in compliance with their relevant assessment strategies.

Witness testimony

Skillsfirst recognise the use of witness testimony and expert witness testimony as appropriate methods for assessors to collect evidence on candidate's performance.

Witness testimonies can be obtained from people that are occupationally competent and who may be familiar with the national occupational standards, such as the learner's line manager. They may also be obtained from people who are not occupationally competent and do not have a knowledge of the national occupational standards such as other people within the learner's workplace, customers and suppliers.

The assessor must judge the validity of the witness testimony and these may vary depending on the source. Witness testimonies can only support the assessment process and may remove or reduce the need to collect supplementary evidence. However, centres must comply with Skillsfirst guidance over the occupational competence and briefing of witnesses in the use of witness testimony.

4.4 Recognition of prior learning (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification. Should any opportunities for RPL be identified, it is important that a complete process of recognising prior experience and learning is undertaken, by ensuring that:

- it covers relevant or appropriate experience for previous activities, as well as accredited learning and qualifications
- it is incorporated into the assessment planning, with details of how this will take place
- mapping of prior learning to the national occupational standards to identify gaps is documented and auditable
- assessment methods or processes for recognising prior experience and learning, are documented and made available to the external verifier
- the audit trail covers the whole process and methodology of RPL
- the authenticity and currency of presented evidence is established by the assessor

- where observation or expert witness testimony is a unit assessment method requirement, this activity is undertaken after learner registration for the qualification

In considering the appropriateness of any single piece of **evidence**, the following should be considered:

- **Content** – the degree to which the content of any previous accredited learning meets the requirements of the national occupational standards against which it is being presented as evidence.
- **Performance and knowledge** – the degree to which the previous learning covered both performance and knowledge. Some learning will only have offered and tested the latter, in which case RPL will only recognise the meeting of knowledge requirements. Performance will require further assessment. Although unlikely, the reverse (performance tested but not knowledge) could be true in which case knowledge and understanding would need further assessment.
- **Relevance of context** – the degree to which the context of the learning gained and assessed, relates to the current context of learner' work roles. If the context was different, assessors will need to satisfy themselves of learners' ability to transfer the learning gained into their current setting.
- **Currency** – how recently the learning was gained. Learners would need to demonstrate current knowledge and understanding of areas such as legislation, policy and practice etc, which may have changes since the previous learning programmes were undertaken.
- **Authenticity** – how the ownership of the evidence is established to ensure it was generated by the learner.

5.0 Qualification information

5.1 What is the qualification and credit framework?

The qualification and credit framework (QCF) is a way of recognising achievement through the award of credit for units and qualifications. It will provide flexible routes to gaining full qualifications and enable qualifications to be achieved in smaller steps. Units within the framework will have a level (ranging from entry level to level 8) to indicate the level of difficulty. They will also have a credit value to indicate the size of the unit.

The QCF will:

- allow providers to design more flexible programmes, suited to the needs of a wider range of learners
- describe achievements (credits) to employers, providers and learners in a way that is easy to understand
- allow learners to accumulate credit, by recognising smaller steps of learning at their own pace
- allow learners to transfer credits into an electronic learner achievement record, which they will keep for life

5.2 QCF units

Each unit has a credit value based on the total number of hours of learning required to achieve it, (notional learning). Each 10 hours of learning equals 1 credit, for example, if a unit takes 30 hours of learning, it will receive a credit value of 3. The units vary in credit value. In addition all units have a level which may be different from the qualification in which they can be used.

5.3 QCF terminology

Whilst the evidence outcomes required from QCF and NVQ units are the same, the QCF units use different terminology to the NVQ units. The assessment criteria for NVQ units are listed under 'what you must do' and 'what you must know' whereas the QCF units are all listed under 'the learner can'.

5.4 Availability of qualifications

This handbook covers the Level 3 Diploma in Business Administration (QCF). To complete a qualification, the minimum credit value must be achieved and progressive qualifications at a higher level require more credit to be achieved. The number of units to achieve this is not fixed, as it is the total credit value that is required. Rules of combination apply to each qualification. Learners can accumulate credit which will allow them to claim award, certificate or diploma certification, as the qualification credit values are achieved.

5.5 Qualification aim and design

This qualification has been designed to develop learners' skills, knowledge and overall competence to enable them to carry out complex administrative functions and activities. It would be suitable for administrators, administrative officers, senior secretaries and those acting as a supervisor/team leader in an administration function.

It accredits learners' abilities to carry out a range of non-routine administrative tasks in a senior role and has been designed to accredit their achievements in a modern, practical way that is relevant to the work context and aids career progression. There is a wide range of optional units covering different administrative areas allowing learners to choose units that best fit their needs.

This qualification also serves as a core component of the Level 3 Advanced Apprenticeship in Business Administration.

6.0 Qualification structure

6.1 Number of credits required for this qualification

Qual no.	Level	Qualification title	Number of credits
BUSD3	3	Level 3 Diploma in Business Administration (QCF)	Minimum of 58

6.2 Rules of Combination

A minimum total of 58 credits must be achieved to gain the qualification as follows:

All 27 credits must be achieved from Group M and minimum of 13 credits must be achieved from Group A.

A maximum of 10 credits can only be achieved from Group B and a maximum of 8 credits can only be achieved from Group C.

A minimum of 40 credits **must** be at Level 3 or above.

Minimum Guided Learning Hours (GLH) are 282

Maximum Guided Learning Hours (GLH) are 432

6.3 List of available units and their credit value

The list below gives the unit titles, their level and the credit value of each unit.

Group M - mandatory units

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
Y/506/1910	BUS40	3	Communicate in a business environment	4
R/506/1940	BUS57	3	Principles of business communication and information	4
Y/506/1941	BUS58	3	Principles of administration	6
D/506/1942	BUS59	3	Principles of business	10
T/506/2952	ML9	3	Manage personal and professional development	3

Group A - optional units – business administration

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value	Barred unit
Y/506/1809	BUS14	2	Produce business documents	3	
R/506/1811	BUS16	2	Store and retrieve information	4	
Y/506/1812	BUS17	2	Produce minutes of meetings	3	
D/506/1813	BUS18	2	Handle mail	3	
K/506/1815	BUS20	2	Prepare text from notes using touch typing	4	
M/506/1816	BUS21	2	Prepare text from shorthand	6	
T/506/1817	BUS22	2	Prepare text from recorded audio instruction	4	
Y/506/2295	BUS25	2	Maintain and issue stationery and supplies	3	

L/506/1869	BUS27	2	Contribute to the organisation of an event	3	
D/506/1875	BUS28	2	Organise business travel or accommodation	4	BUS48
H/506/1876	BUS29	2	Provide administrative support for meetings	4	
T/506/1879	BUS30	2	Administer human resource records	3	
A/506/1883	BUS31	2	Administer the recruitment and selection process	3	
R/506/1887	BUS32	2	Administer parking dispensations	3	
R/506/1890	BUS33	2	Administer finance	4	
M/506/1895	BUS35	2	Buddy a colleague to develop their skills	3	
L/506/1905	BUS39	2	Employee rights and responsibilities	2	
D/506/1911	BUS41	3	Contribute to the improvement of business performance	6	
H/506/1912	BUS42	3	Negotiate in a business environment	4	
K/506/1913	BUS43	3	Develop a presentation	3	
M/506/1914	BUS44	3	Deliver a presentation	3	
T/506/1915	BUS45	3	Create bespoke business documents	4	
A/506/1916	BUS46	3	Contribute to the development and implementation of an information system	6	
F/506/1917	BUS47	3	Monitor information systems	8	
J/506/1918	BUS48	3	Evaluate the provision of business travel or accommodation	5	BUS28
L/506/1919	BUS49	3	Provide administrative support in schools	5	
F/506/1920	BUS50	3	Administer parking and traffic challenges, representations and civil parking appeals	5	
R/506/1923	BUS51	3	Administer statutory parking and traffic appeals	6	
T/506/1932	BUS52	3	Administer parking and traffic debt recovery	5	
J/506/1935	BUS53	3	Administer legal files	5	
L/506/1936	BUS54	3	Build legal case files	5	
Y/506/1938	BUS55	3	Manage legal case files	5	
K/506/1944	BUS60	3	Manage an office facility	4	

M/506/1945	BUS61	3	Analyse and present business data	6	
R/506/1954	BUS66	4	Support environmental sustainability in a business environment	4	
D/506/1956	BUS67	4	Resolve administrative problems	6	
H/506/1957	BUS68	4	Prepare specifications for contracts	4	

Group B - optional units - IT and management

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value	Barred unit
L/506/2150	CUS25	3	Organise and deliver customer service	5	
R/506/2151	CUS31	3	Resolve customer's complaints	4	
J/502/4397	IT301	3	Bespoke software	4	
T/502/4556	IT303	3	Database software	6	
T/502/4623	IT306	3	Presentation software	6	
J/502/4626	IT308	3	Spreadsheet software	6	
Y/502/4632	IT310	3	Website software	5	
Y/502/4629	IT311	3	Word processing software	6	
T/502/4301	IT312	3	Using email	3	
T/506/1820	ML10	3	Promote equality, diversity and inclusion in the workplace	3	
A/506/1821	ML11	3	Manage team performance	4	
J/506/1921	ML12	3	Manage individuals' performance	4	
L/506/1922	ML13	3	Manage individuals' development in the workplace	3	
Y/506/1924	ML14	3	Chair and lead meetings	3	
J/506/2292	ML16	3	Encourage innovation	4	
M/506/1928	ML18	3	Procure products and/or services	5	
T/506/1929	ML19	3	Implement change	5	
K/506/1930	ML20	3	Implement and maintain business continuity plans and processes	4	
F/506/1934	ML23	3	Participate in a project	3	ML40

J/506/1949	ML25	4	Develop and maintain professional networks	3	
Y/506/1955	ML27	4	Develop and implement an operational plan	5	
K/506/1989	ML34	4	Manage physical resources	4	
K/506/1992	ML36	4	Prepare for and support quality audits	3	
A/506/1995	ML38	4	Manage a budget	4	
R/506/1999	ML40	4	Manage a project	7	ML23
L/506/2004	ML41	4	Manage business risk	6	
R/506/2909	ML43	4	Recruitment, selection and induction practice	6	

Group C - optional units - general

QCF unit no.	Skillsfirst unit no.	Level	Unit title	Credit value
D/506/1939	BUS56	3	Understand the legal context of business	6
Y/506/2152	CUS26	3	Understand the customer service environment	5
K/502/9933	MK1	3	Principles of market research	5
T/502/9935	MK2	3	Principles of marketing and evaluation	7
J/502/9938	MK3	3	Principles of marketing stakeholder relationships	3
F/506/2596	ML15	3	Principles of leadership and management	8
F/502/9937	PDM3	3	Principles of digital marketing and research	7
R/503/9324	RECP17	3	Principles of social media within a business	6

6.4 Learner entry requirements

Formal requirements

There are no formal entry requirements for learners undertaking this qualification; however centres must ensure that learners have the potential and opportunity to gain evidence for the qualification in the work place.

Age restrictions

There are no age limits attached to learners undertaking this qualification unless this is a legal requirement of the process or the environment.

6.5 Progression opportunities

On completion of the Level 3 Diploma in Business Administration (QCF), learners may progress into employment or onto the following Skillsfirst qualifications:

- Skillsfirst Level 3 Diploma in Customer Service (QCF)
- Skillsfirst Level 3 Diploma in Management (QCF)

or similar higher level qualifications.

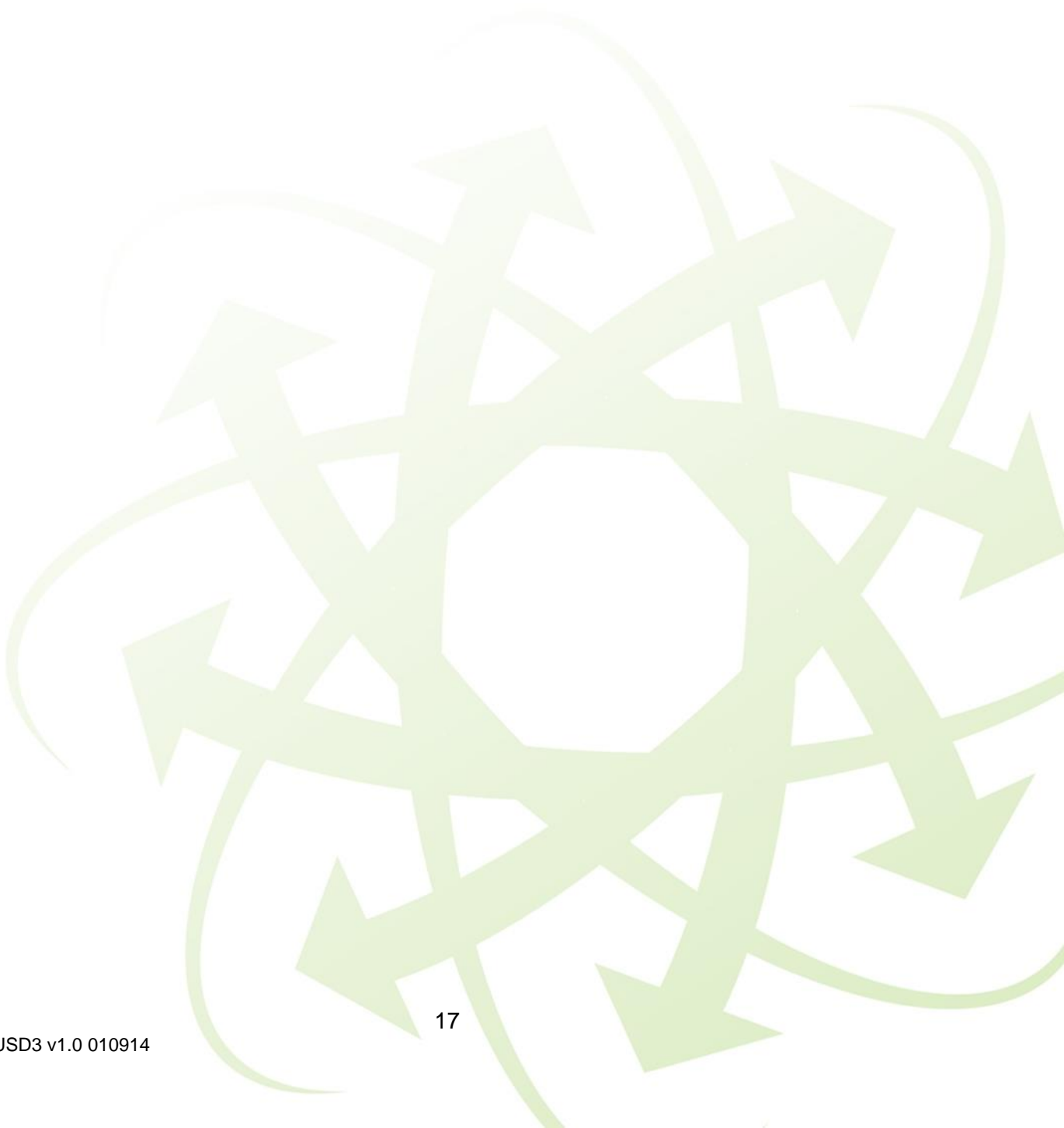
7.0 The Units of Learning

7.1 Structure of the units

The units which make up these qualifications are written in a standard format and comprise of:

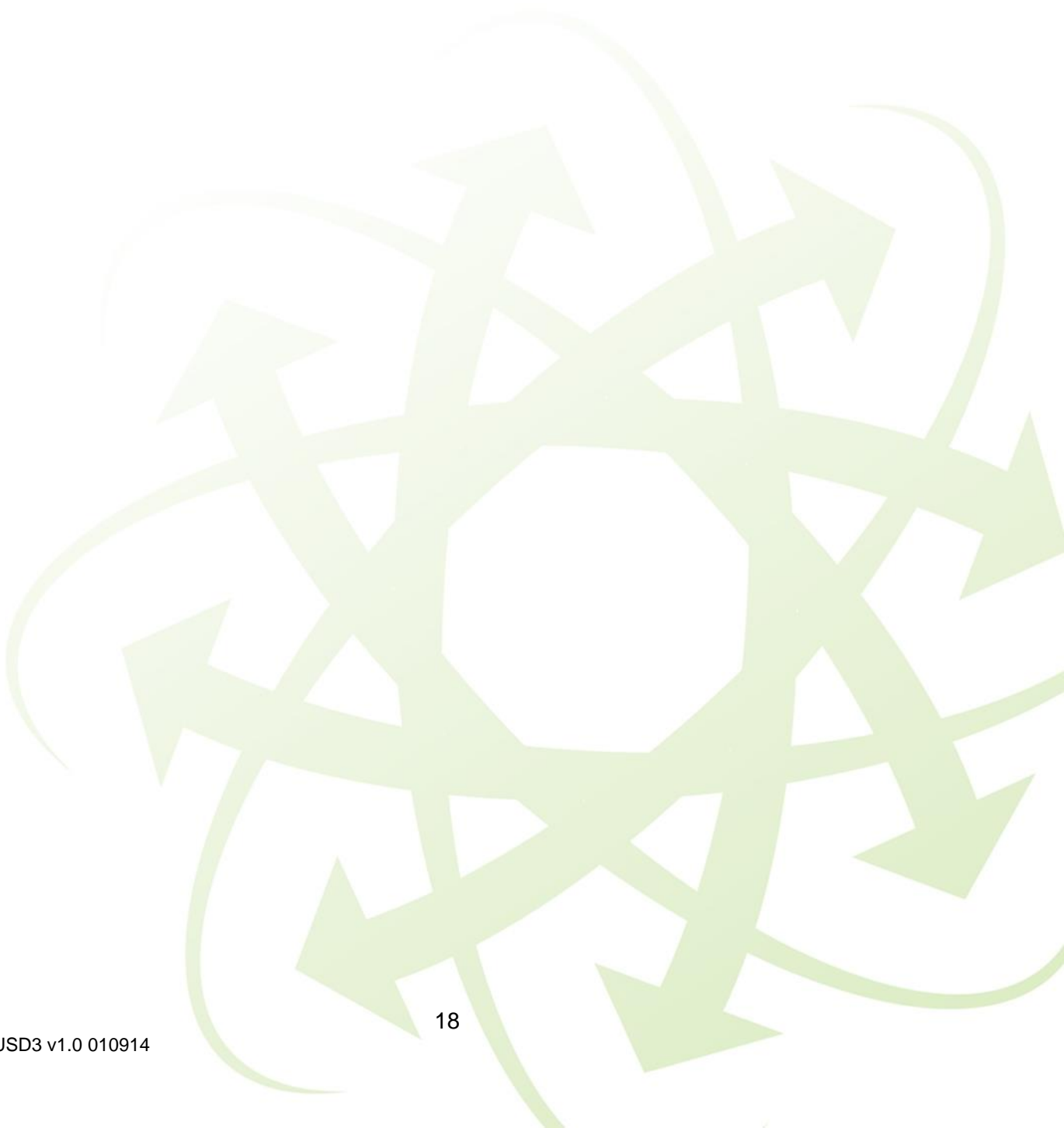
- Skillsfirst reference number
- unit title
- level and credit value
- unit aim
- learning outcomes
- guided learning hours
- endorsement of the unit
- information on assessment
- learning outcomes and assessment criteria

7.2 Group M - mandatory units



BUS40

Communicate in a business environment



BUS40 Communicate in a business environment

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the different business communication models, systems and processes and the ability to communicate verbally and in writing in a business environment.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand business communication models, systems and processes
2. Be able to communicate in writing in business
3. Be able to communicate verbally in business

Guided learning hours

It is recommended that **24** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Stakeholders may include, but are not limited to:

- Shareholders
- Directors
- Colleagues and managers
- Customers
- The local community in which a business operates
- Standards agencies

Agreed business practices to include house styles, and in line with organisational policies

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS40 Communicate in a business environment

Learning outcomes and assessment criteria

Outcome 1 Understand business communication models, systems and processes

The learner can:

- 1 analyse the communication needs of internal and external stakeholders
- 2 analyse the different communication models that support administration
- 3 evaluate the effectiveness of different communication systems
- 4 explain the factors that affect the choice of communication media
- 5 explain the importance of using correct grammar, sentence structure, punctuation, spelling and conventions in business communications
- 6 explain the factors to be taken into account in planning and structuring different communication media
- 7 explain ways of overcoming barriers to communication
- 8 explain the use of communications theories and body language
- 9 explain proof-reading techniques for business communications

Outcome 2 Be able to communicate in writing in business

The learner can:

- 1 identify the purpose and audience of the information to be communicated
- 2 select communication media that are appropriate to the audience and information to be communicated
- 3 present information in the format, layout and style that is appropriate to the information to be communicated
- 4 follow agreed business practices when communicating in writing
- 5 adapt the style and content of a communication, appropriate to specific audiences
- 6 present written communications that are clear, expressed in correct grammar and reflect what is intended
- 7 meet agreed deadlines in communicating with others

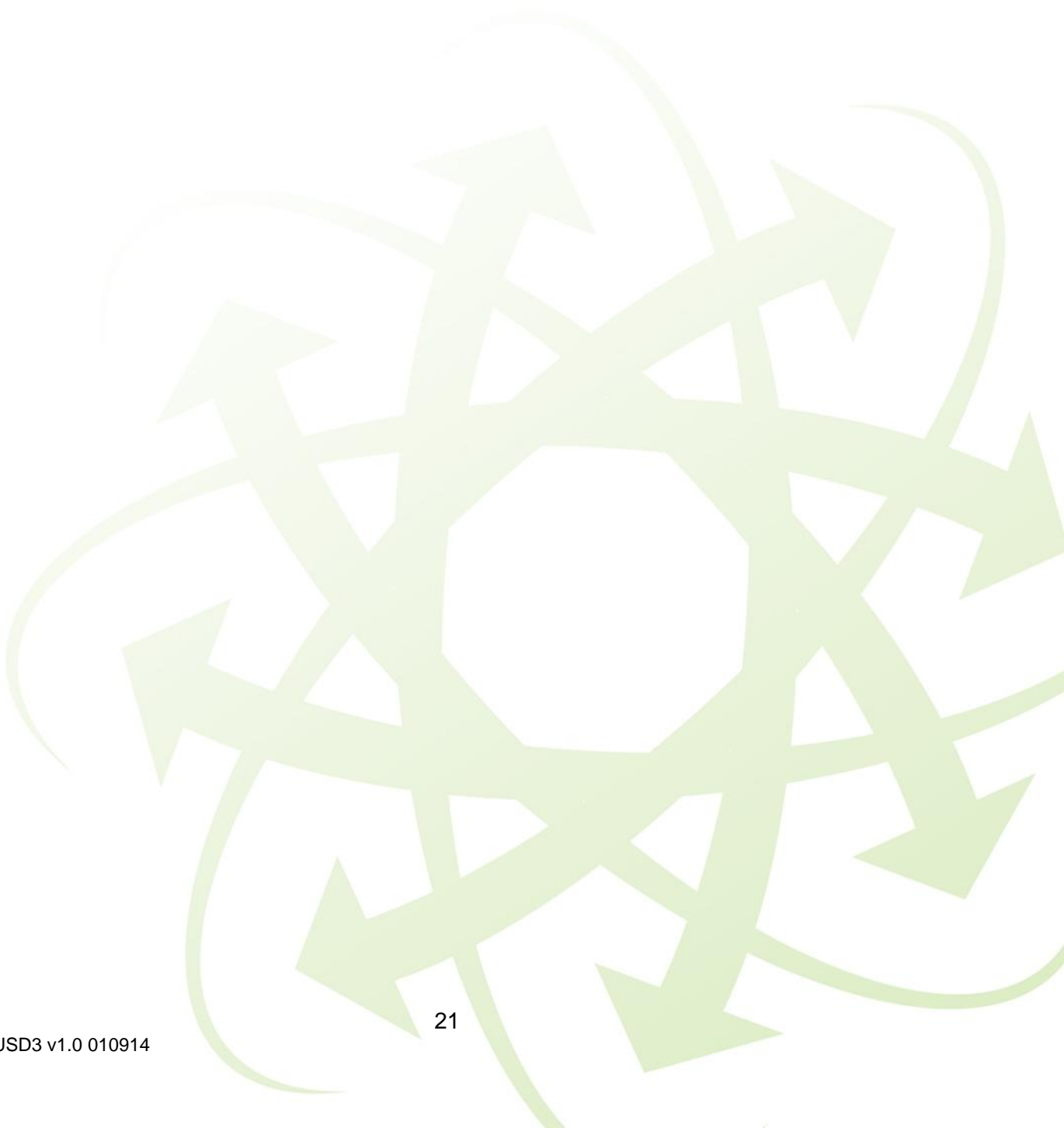
Outcome 3 Be able to communicate verbally in business

The learner can:

- 1 identify the nature, purpose, audience and use of the information to be communicated
- 2 use language that is correct and appropriate for the audience's needs
- 3 use appropriate body language and tone of voice to reinforce messages
- 4 identify the meaning and implications of information that is communicated verbally
- 5 confirm that a recipient has understood correctly what has been communicated
- 6 respond in a way that is appropriate to the situation and in accordance with organisational policies and standards

BUS57

Principles of business communication and information



BUS57 Principles of business communication and information

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of negotiation and information systems in a business environment. It also provides learners with an understanding of how to create bespoke business documents and to develop and deliver presentations.

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand negotiation in a business environment
2. Understand how to develop and deliver presentations
3. Understand how to create bespoke business documents
4. Understand information systems in a business environment

Guided learning hours

It is recommended that **27** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Techniques should cover the methods used including software and in house processes

Information systems may include:

- hardware
- software
- infrastructure

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS57 Principles of business communication and information

Learning outcomes and assessment criteria

Outcome 1 Understand negotiation in a business environment

The learner can:

- 1 explain the importance of negotiation in a business environment
- 2 explain the features and uses of different approaches to negotiation
- 3 identify the components of negotiation tactics

Outcome 2 Understand how to develop and deliver presentations

The learner can:

- 1 explain the different types of presentation and their requirements
- 2 explain how different resources can be used to develop a presentation
- 3 explain different methods of giving presentations
- 4 explain best practice in delivering presentations
- 5 explain how to collect and use feedback on a presentation

Outcome 3 Understand how to create bespoke business documents

The learner can:

- 1 explain the characteristics of bespoke documents
- 2 explain the factors to be taken into account in creating and presenting bespoke documents
- 3 explain the legal requirements and procedures for gathering information for bespoke documents
- 4 explain techniques to create bespoke business documents
- 5 explain how to gain approval of bespoke documents

Outcome 4 Understand information systems in a business environment

The learner can:

- 1 explain the typical stages of information system development
- 2 analyse the benefits and limitations of different information systems
- 3 explain legal, security and confidentiality requirements for information systems in a business environment
- 4 explain how to monitor the use and effectiveness of an information system

BUS58

Principles of administration



BUS58 Principles of administration

Level: 3

Credit value: 6

Unit aim

The aim of this unit is to provide learners with an understanding of how to manage an office facility and the health and safety in a business environment. It also provides learners with an understanding of how to organise events, supervise an administration team, chair, lead and manage meetings, as well as how to take minutes of meetings.

Learning outcomes

There are **six** outcomes to this unit. The learner will:

1. Understand how to manage an office facility
2. Understand health and safety in a business environment
3. Understand how to take minutes of meetings
4. Understand how to chair, lead and manage meetings
5. Understand how to supervise an administration team
6. Understand how to organise events

Guided learning hours

It is recommended that **27** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Events may include, but are not limited to a:

- Meeting
- Conference
- Product launch
- Announcement
- Celebration
- Social occasion

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS58 Principles of administration

Learning outcomes and assessment criteria

Outcome 1 Understand how to manage an office facility

The learner can:

- 1 explain the legal requirements relating to the management of office facilities
- 2 describe the typical services provided by an office facility
- 3 explain how to establish office management procedures
- 4 explain how to manage office resources
- 5 explain techniques to monitor and manage work flows
- 6 explain typical support and welfare facilities for office workers

Outcome 2 Understand health and safety in a business environment

The learner can:

- 1 explain the legal obligations of the employer for health and safety in the workplace
- 2 explain an individual's responsibilities for health and safety in the workplace
- 3 describe accident and emergency procedures

Outcome 3 Understand how to take minutes of meetings

The learner can:

- 1 explain the purpose of meeting minutes
- 2 explain the legal implications of meeting minutes
- 3 explain the importance of accuracy in minute taking
- 4 describe what should and should not be included in different types of meeting minutes
- 5 describe how to take notes during meetings

Outcome 4 Understand how to chair, lead and manage meetings

The learner can:

- 1 explain the features and purpose of different types of formal and informal meeting
- 2 explain the role and responsibilities of the chair
- 3 explain the role of others in a meeting
- 4 explain techniques to facilitate a meeting
- 5 explain the information requirements of a meeting before, during and after a meeting

Outcome 5 Understand how to supervise an administration team

The learner can:

- 1 explain the use of targets and budgets to manage workloads
- 2 explain how to allocate work to individual team members
- 3 explain different quality management techniques to manage the performance of an administrative team
- 4 explain the techniques used to identify the need for improvements in team outputs and standards

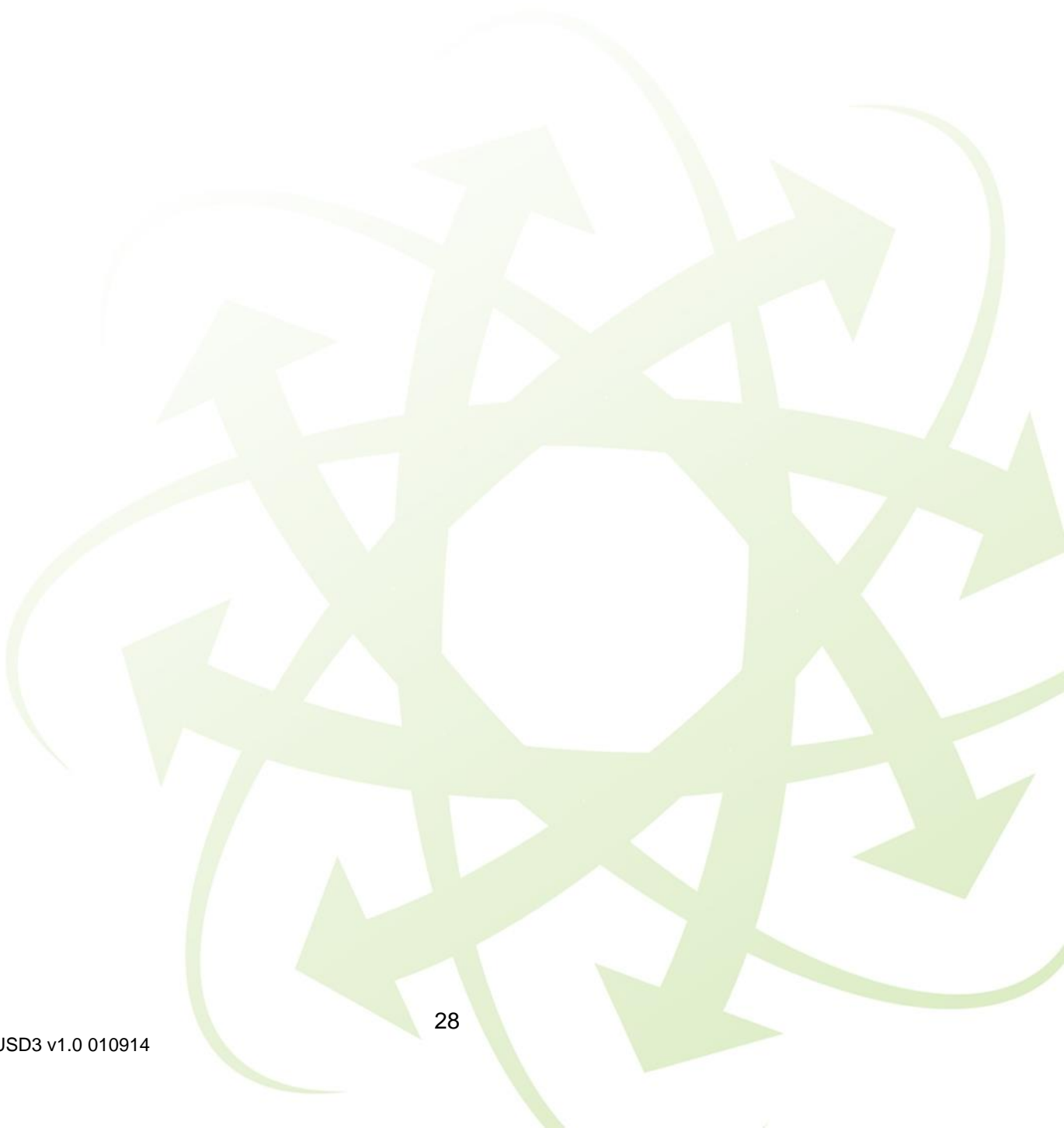
Outcome 6 Understand how to organise events

The learner can:

- 1 explain the characteristics, requirements and purposes of different types of events
- 2 explain the types of information and information sources needed to organise an event
- 3 explain how to plan an event
- 4 explain how to identify the right resources from an event plan
- 5 describe the likely types of information needed by delegates before, during and after an event

BUS59

Principles of business



BUS59 Principles of business

Level: 3

Credit value: 10

Unit aim

The aim of this unit is to provide learners with an understanding of business markets, innovation and growth, financial management and budgeting. It also provides learners with an understanding of sales and marketing

Learning outcomes

There are **five** outcomes to this unit. The learner will:

1. Understand business markets
2. Understand business innovation and growth
3. Understand financial management
4. Understand business budgeting
5. Understand sales and marketing

Guided learning hours

It is recommended that **74** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Business markets are also known as business-to-business (B2B) markets or industrial marketing. They are markets in which goods/services are sold between companies/organisations as opposed to consumer markets.

The common features of **models of business innovation** are that they extend product life, conserve resources and prevent materials from becoming waste.

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS59 Principles of business

Learning outcomes and assessment criteria

Outcome 1 Understand business markets

The learner can:

- 1 explain the characteristics of different business markets
- 2 explain the nature of interactions between businesses within a market
- 3 explain how an organisation's goals may be shaped by the market in which it operates
- 4 describe the legal obligations of a business

Outcome 2 Understand business innovation and growth

The learner can:

- 1 define business innovation
- 2 explain the uses of models of business innovation
- 3 identify sources of support and guidance for business innovation
- 4 explain the process of product or service development
- 5 explain the benefits, risks and implications associated with innovation

Outcome 3 Understand financial management

The learner can:

- 1 explain the importance of financial viability for an organisation
- 2 explain the consequences of poor financial management
- 3 explain different financial terminology

Outcome 4 Understand business budgeting

The learner can:

- 1 explain the uses of a budget
- 2 explain how to manage a budget

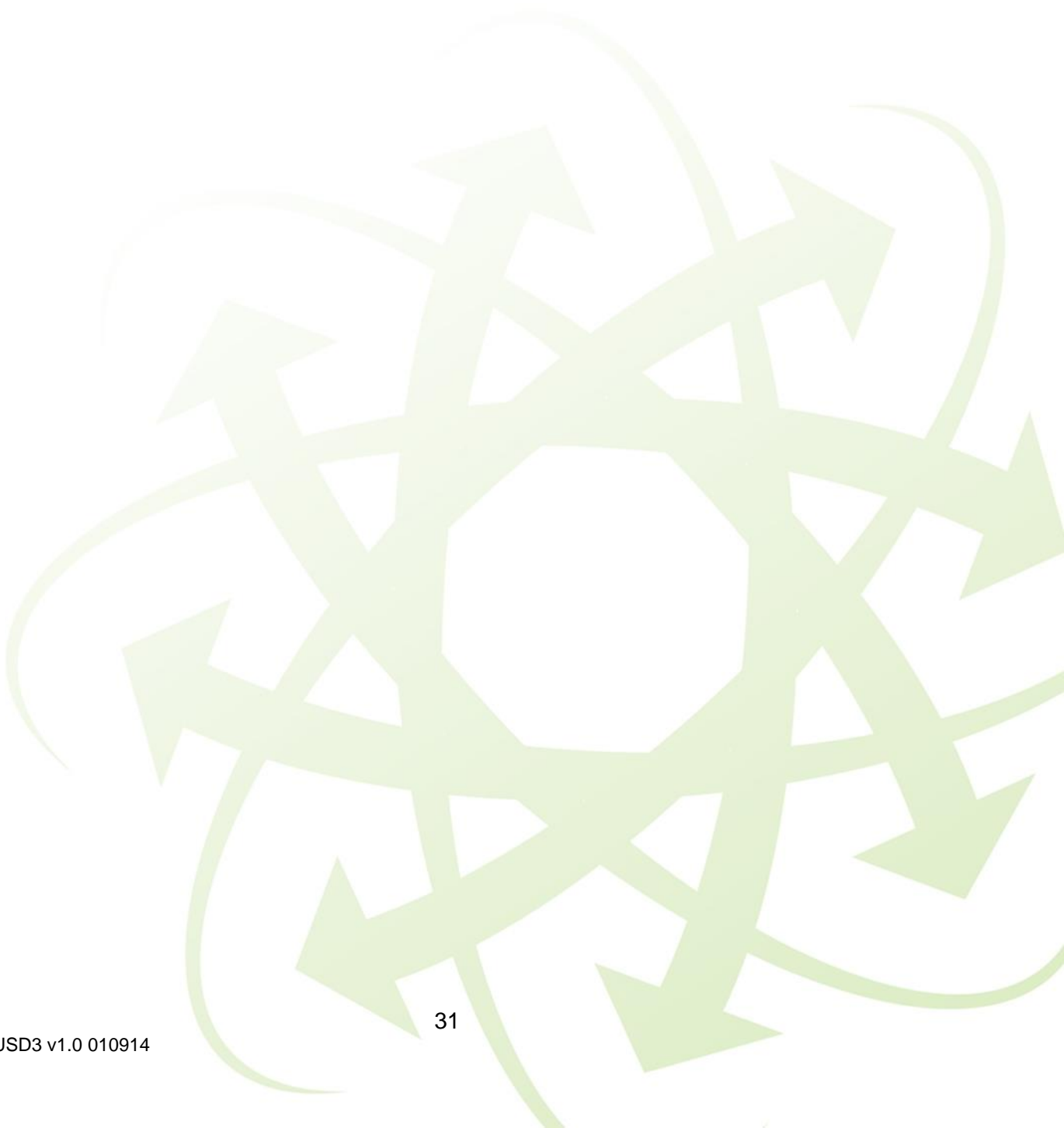
Outcome 5 Understand sales and marketing

The learner can:

- 1 explain the principles of marketing
- 2 explain a sales process
- 3 explain the features and uses of market research
- 4 explain the value of a brand to an organisation
- 5 explain the relationship between sales and marketing

ML9

Manage personal and professional development



ML9 Manage personal and professional development

Level: 3

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an ability to identify personal and professional development requirements, fulfil a personal and professional development plan and maintain its relevance.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Be able to identify personal and professional development requirements
2. Be able to fulfil a personal and professional development plan
3. Be able to maintain the relevance of a personal and professional development plan

Guided learning hours

It is recommended that **12** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Trends and developments may include, but are not limited to:

- Organisational
- Vocational – sector driven
- Governmental
- Legal/Regulatory
- Technological
- Scientific

Benefits may include, but are not limited to:

- Promotion prospects
- Improved knowledge and skills
- Use of new skills
- Opportunity to increase work responsibilities/salary

A **skills gap analysis** is a tool used to identify the difference between a current state and a future goal state within a business.

SMART – (Specific, Measurable, Achievable, Realistic, Time-framed)

Sources may include, but are not limited to:

- Management reviews
- Feedback reports from other internal departments
- External customer feedback reporting

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML9 Manage personal and professional development

Learning outcomes and assessment criteria

Outcome 1 Be able to identify personal and professional development requirements

The learner can:

- 1 compare sources of information on professional development trends and their validity
- 2 identify trends and developments that influence the need for professional development
- 3 evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation

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

The learner can:

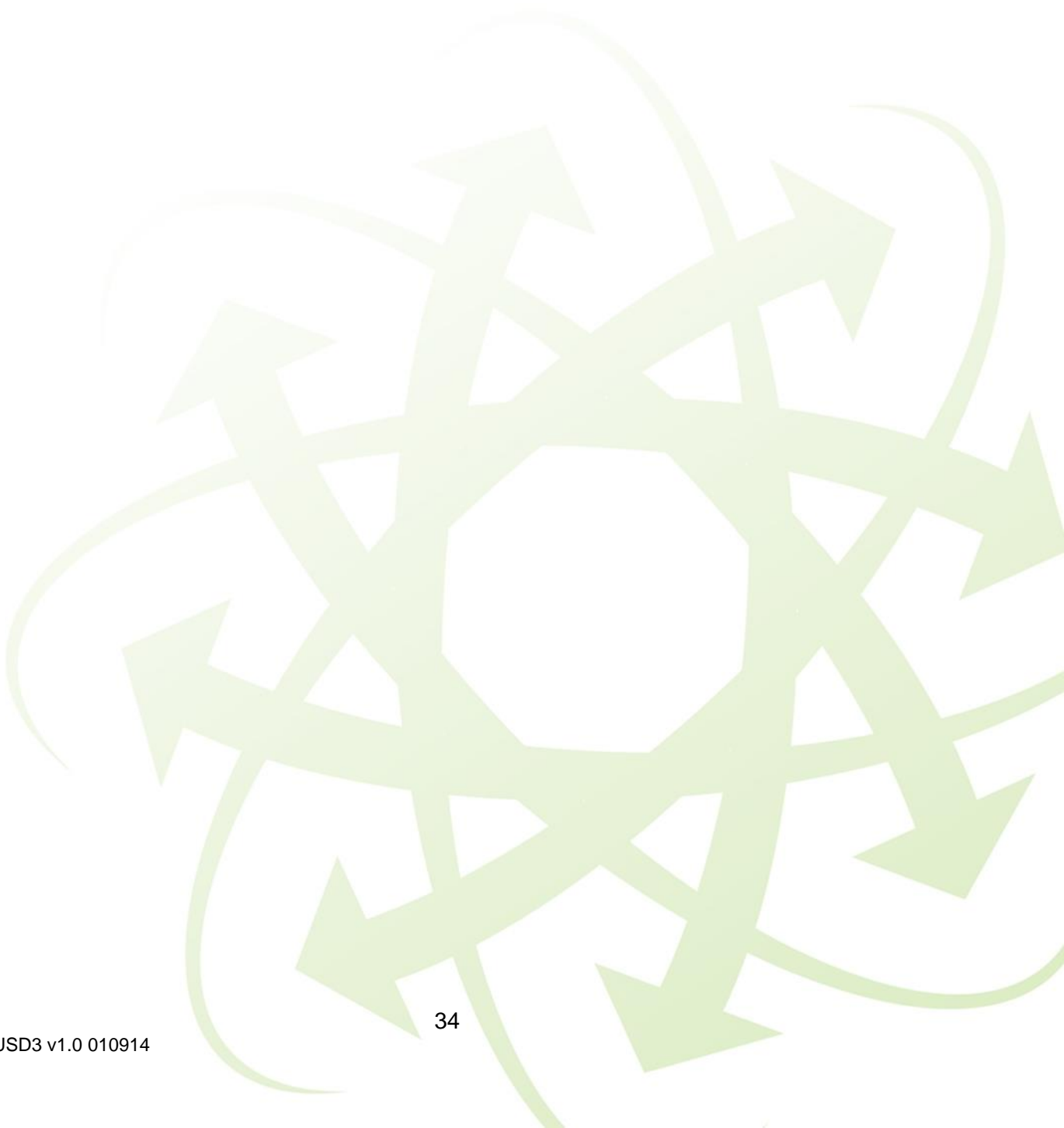
- 1 evaluate the benefits of personal and professional development
- 2 explain the basis on which types of development actions are selected
- 3 identify current and future likely skills, knowledge and experience needs using skills gap analysis
- 4 agree a personal and professional development plan that is consistent with business needs and personal objectives
- 5 execute the plan within the agreed budget and timescale
- 6 take advantage of development opportunities made available by professional networks or professional bodies

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

The learner can:

- 1 explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives
- 2 obtain feedback on performance from a range of valid sources
- 3 review progress toward personal and professional objectives
- 4 amend the personal and professional development plan in the light of feedback received from others

Group A - optional units



BUS14

Produce business documents



BUS14 Produce business documents

Level: 2

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of how to prepare business documents and the ability to prepare and distribute business documents

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand how to prepare business documents
2. Be able to prepare business documents
3. Be able to distribute business documents

Guided learning hours

It is recommended that **24** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Requirements include those of the organisation and the task at hand

Simulation is not allowed

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS14 Produce business documents

Learning outcomes and assessment criteria

Outcome 1 Understand how to prepare business documents

The learner can:

- 1 explain the requirements for language, tone, image and presentation for different documents
- 2 explain how to integrate images into documents
- 3 describe how corporate identity impacts upon document production
- 4 explain the requirements of data protection, copyright and intellectual property legislation relating to document production
- 5 describe organisational procedures for version control
- 6 describe security requirements relating to document production

Outcome 2 Be able to prepare business documents

The learner can:

- 1 identify the purpose, audience, content, style, format and deadlines of a document
- 2 use document production resources in line with organisational guidelines
- 3 use correct grammar, spelling, punctuation and sentence structure
- 4 produce documents that meet the requirements within the agreed timescale

Outcome 3 Be able to distribute business documents

The learner can:

- 1 provide final documents in the appropriate medium for authorised readers
- 2 specify restrictions and distribution lists in accordance with the requirements
- 3 maintain the requirements of security in the production, distribution and storage of documents

BUS16

Store and retrieve information



BUS16 Store and retrieve information

Level: 2

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of information storage and retrieval and the ability to gather, store and retrieve information

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand information storage and retrieval
2. Be able to gather and store information
3. Be able to retrieve information

Guided learning hours

It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Systems can include:

- Paper
- Electronic
- Organisational systems

Simulation is not allowed

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS16 Store and retrieve information

Learning outcomes and assessment criteria

Outcome 1 Understand information storage and retrieval

The learner can:

- 1 describe systems and procedures for storing and retrieving information
- 2 outline legal and organisational requirements for information security and retention
- 3 explain how to create filing systems to facilitate information identification and retrieval
- 4 explain how to use different search techniques to locate and retrieve information
- 5 describe what to do when problems arise when storing or retrieving information

Outcome 2 Be able to gather and store information

The learner can:

- 1 gather the information required within the agreed timescale
- 2 store files and folders in accordance with organisational procedures
- 3 store information in approved locations
- 4 adhere to organisational policies and procedures, legal and ethical requirements

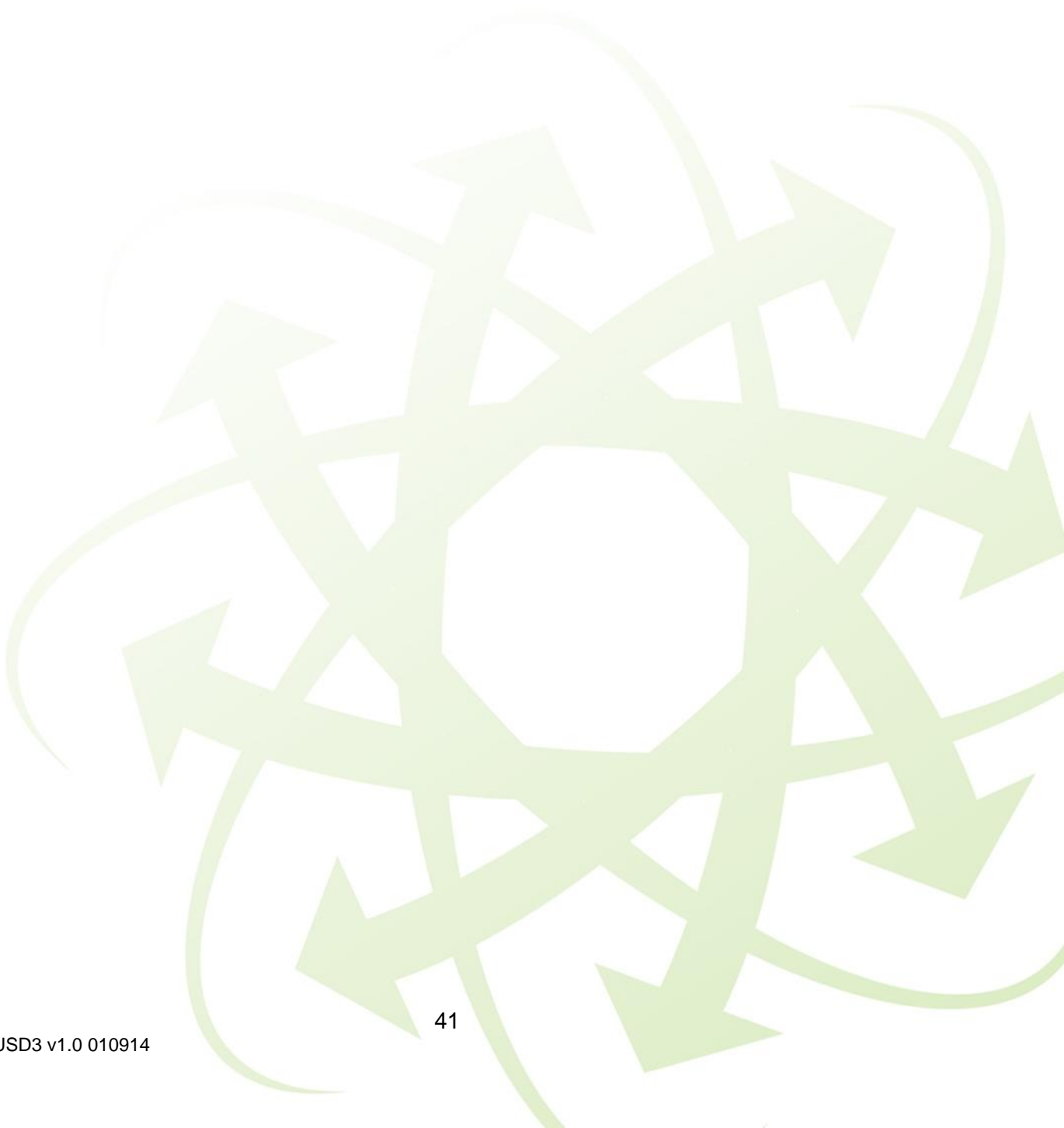
Outcome 3 Be able to retrieve information

The learner can:

- 1 confirm information to be retrieved and its intended use
- 2 retrieve the required information within the agreed timescale

BUS17

Produce minutes of meetings



BUS17 Produce minutes of meetings

Level: 2

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of how to take minutes of meetings and the ability to take notes and produce minutes of those meetings

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand how to take minutes of meetings
2. Be able to take notes of meetings
3. Be able to produce minutes of meetings

Guided learning hours

It is recommended that **13** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Minutes are an instant written record of a meeting or hearing

Meeting records may include, but are not limited to:

- Minutes
- Agendas
- Audio recordings
- Video recordings
- Secretary's notes

Formal minutes are a permanent, detailed record of business transacted and resolutions adopted at official meetings that must be approved at the next meeting as a true representation of the proceedings

Organisational conventions are the way in which something is usually done within a business.

To **transcribe** is to put into a written or printed form

Appendices are supplementary material at the end of a document, usually of an explanatory, statistical, or bibliographic nature.

Simulation is not allowed

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS17 Produce minutes of meetings

Learning outcomes and assessment criteria

Outcome 1 Understand how to take minutes of meetings

The learner can:

- 1 explain the purpose of different types of minutes and other meeting records
- 2 explain the legal requirements of formal minutes
- 3 describe organisational conventions for producing minutes
- 4 describe the responsibilities of the minute taker in a meeting
- 5 explain why it is important to maintain confidentiality of meetings, discussions and actions
- 6 explain why it is necessary to record who proposed and seconded suggestions and changes

Outcome 2 Be able to take notes of meetings

The learner can:

- 1 take accurate notes of the attendance, proceedings, areas of discussion and agreed actions of meetings
- 2 record allocated responsibilities for agreed actions

Outcome 3 Be able to produce minutes of meetings

The learner can:

- 1 transcribe notes accurately into meeting minutes using correct language, grammar, punctuation and sentence structure and in the agreed style
- 2 include agreed attachments or appendices
- 3 obtain approval for the final documents
- 4 distribute minutes to the agreed distribution list
- 5 maintain the requirements of confidentiality

BUS18

Handle mail



BUS18 Handle mail

Level: 2

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of how to deal with mail and the ability to deal with incoming and outgoing mail.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand how to deal with mail
2. Be able to deal with incoming mail
3. Be able to deal with outgoing mail

Guided learning hours

It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS18 Handle mail

Learning outcomes and assessment criteria

Outcome 1 Understand how to deal with mail

The learner can:

- 1 explain how to deal with “junk” mail
- 2 describe what to do in the event of problems arising when dealing with incoming or outgoing mail
- 3 describe how to operate a franking machine
- 4 explain how to prepare packages for distribution
- 5 state organisational policies and procedures on mail handling, security and the use of courier services
- 6 explain the process for reporting suspicious or damaged items in accordance with organisational procedures

Outcome 2 Be able to deal with incoming mail

The learner can:

- 1 sort incoming mail in line with organisational procedures
- 2 distribute incoming mail and packages to the right people according to the agreed schedule
- 3 deal with incorrectly addressed and “junk” mail in accordance with organisational procedures

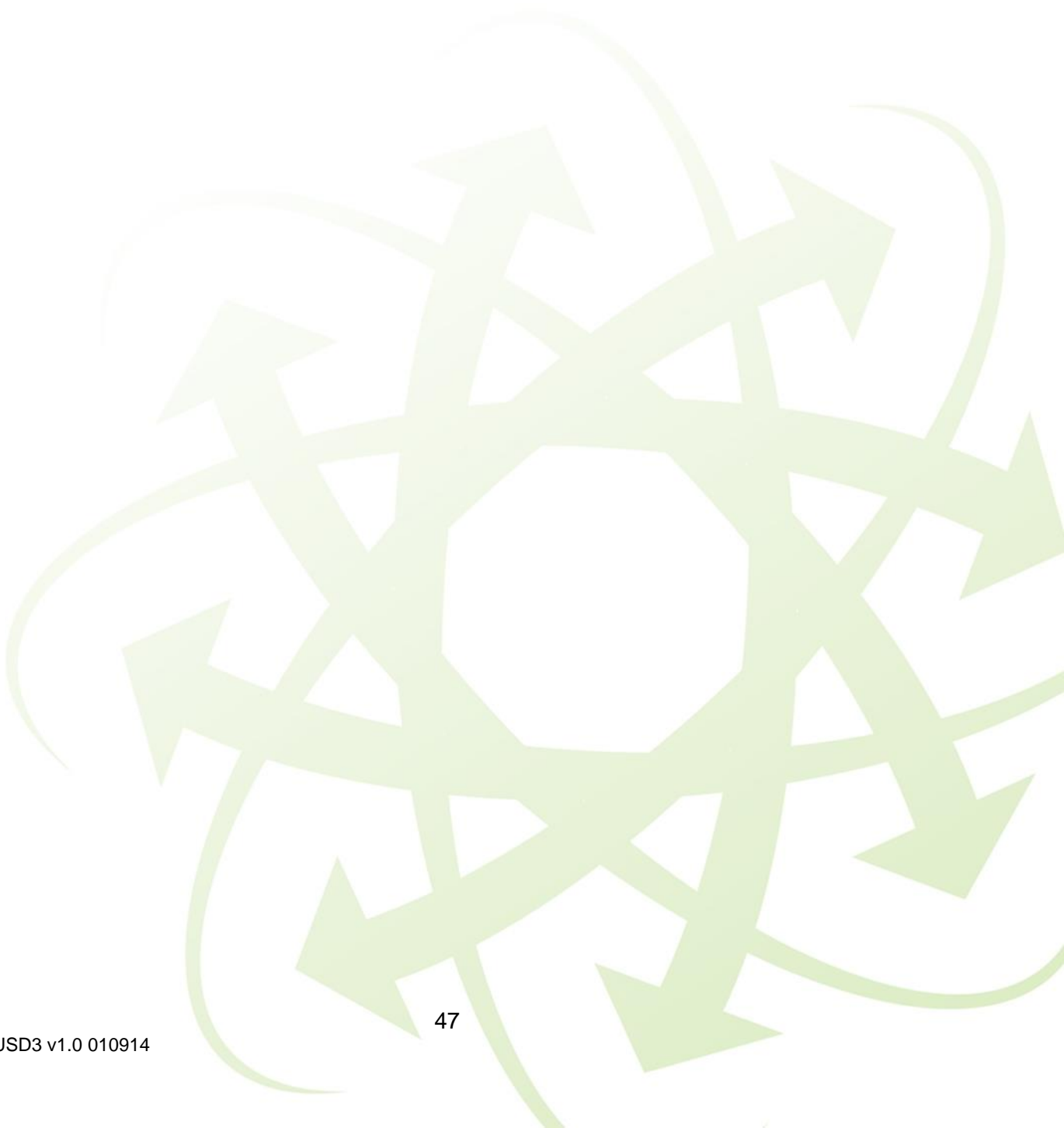
Outcome 3 Be able to deal with outgoing mail

The learner can:

- 1 organise the collection of outgoing mail and packages on time
- 2 identify the best option for dispatching mail according to the required degree of urgency, size and value of the item
- 3 dispatch outgoing mail on time

BUS20

Prepare text from notes using touch typing



BUS20 Prepare text from notes using touch typing

Level: 2

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of how to create text from notes and the ability to produce text using touch typing and the ability to carry out this activity

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand how to create text from notes
2. Be able to produce text using touch typing

Guided learning hours

It is recommended that **26** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Technology features may refer to a function of an IT application or system

Simulation is not allowed

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS20 Prepare text from notes using touch typing

Learning outcomes and assessment criteria

Outcome 1 Understand how to create text from notes

The learner can:

- 1 explain the importance of confirming the purpose of the text and intended audience
- 2 describe the problems that may occur in transcribing notes written by others
- 3 explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
- 4 explain how technology features can help to create, format and check the accuracy of text
- 5 describe ways of checking produced texts for accuracy and correctness
- 6 describe organisational procedures for the storage, security and confidentiality of information

Outcome 2 Be able to produce text using touch typing

The learner can:

- 1 agree the purpose, format and deadlines for texts
- 2 touch type texts at the speed and level of accuracy required by the organisation
- 3 check that the text is accurate and the meaning is clear and correct
- 4 store texts and original notes safely and securely following organisational procedures
- 5 present texts in the required formats and within the agreed timescales

BUS21

Prepare text from shorthand



BUS21 Prepare text from shorthand

Level: 2

Credit value: 6

Unit aim

The aim of this unit is to provide learners with an understanding of how to use shorthand to create text and the ability to carry out this activity

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand how to use shorthand to create text
2. Be able to use shorthand to prepare text

Guided learning hours

It is recommended that **46** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS21 Prepare text from shorthand

Learning outcomes and assessment criteria

Outcome 1 Understand how to use shorthand to create text

The learner can:

- 1 explain the importance of confirming the purpose of the text and intended audience
- 2 describe techniques that may be used when taking shorthand notes
- 3 explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
- 4 explain how technology features can help to create, format and check the accuracy of text
- 5 describe ways of checking produced texts for accuracy and correctness
- 6 describe organisational procedures for the storage, security and confidentiality of information

Outcome 2 Be able to use shorthand to prepare text

The learner can:

- 1 agree the purpose, format and deadlines for texts
- 2 take dictation using shorthand at the speed required by the organisation
- 3 input and format text from shorthand notes
- 4 check that text is accurate and the meaning is clear and correct
- 5 store texts and original notes safely and securely following organisational procedures
- 6 present texts in the required formats and within the agreed timescales

BUS22

Prepare text from recorded audio
instruction



BUS22 Prepare text from recorded audio instruction

Level: 2

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of how to and the ability to carry out this activity

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand the preparation of text from recorded notes
2. Be able to prepare text from recorded notes

Guided learning hours

It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Types of technology could include, but not be exclusive of:

- Analogue recording
- Digital recording
- Dictation software
- Tape recorders
- Disk recorders

Speaking styles could include, but not be exclusive of:

- Accents
- Slang
- Abbreviations
- Mumbling

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS22 Prepare text from recorded audio instruction

Learning outcomes and assessment criteria

Outcome 1 Understand the preparation of text from recorded notes

The learner can:

- 1 explain the importance of confirming the purpose of the text and intended audience
- 2 describe the main features of the different types of technology that can be used for playing back recordings
- 3 explain how different speaking styles of those giving dictation can affect outputs
- 4 explain the consequences of incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content
- 5 describe ways of checking produced texts for accuracy and correctness
- 6 describe organisational procedures for the storage, security and confidentiality of information

Outcome 2 Be able to prepare text from recorded notes

The learner can:

- 1 agree the purpose, format and deadlines for texts
- 2 input and format text from audio recording
- 3 check that text is accurate and the meaning is clear and correct
- 4 store texts and original recordings safely and securely following organisational procedures
- 5 present texts in the required formats and within the agreed timescales

BUS25

Maintain and issue stationery and supplies



BUS25 Maintain and issue stationery and supplies

Level: 2

Credit value: 2

Unit aim

The aim of this unit is to provide learners with an understanding of the maintenance of stationery and supplies and the ability to maintain the stocks of stationery and supplies and to issue stationery and supplies to meet organisational requirements.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the maintenance of stationery and supplies
2. Be able to maintain stocks of stationery and supplies
3. Be able to issue stock of stationery and supplies

Guided learning hours

It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Problems may include but is not limited to: late, damaged or incorrect deliveries of ordered items

Factors may include but is not limited to:

- Urgency
- Budget
- Availability of products/delivery time
- Expected usage

Required levels may include but is not limited to: Based on statistical information, supply and demand estimation, and/or consideration from others such as managers

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS25 Maintain and issue stationery and supplies

Learning outcomes and assessment criteria

Outcome 1 Understand the maintenance of stationery and supplies

The learner can:

- 1 describe organisational policies, procedures and levels of authority in maintaining supplies
- 2 explain how to carry out a stock check of stationery
- 3 describe the types of problems that may occur with deliveries and stock items
- 4 explain how to deal with problems that occur with deliveries and stock items
- 5 explain the factors to take into account when ordering stationery
- 6 explain the benefits and limitations of different potential suppliers, against organisational requirements
- 7 explain how to calculate quantities of stationery and supplies to be ordered
- 8 describe how to dispose of or recycle waste

Outcome 2 Be able to maintain stocks of stationery and supplies

The learner can:

- 1 maintain stocks of stationery and supplies at the required levels
- 2 maintain the requirements of storage and security
- 3 carry out stock checks in accordance with organisational policies and procedures
- 4 chase up late or incorrect orders with suppliers

Outcome 3 Be able to issue stock of stationery and supplies

The learner can:

- 1 issue stationery and supplies in accordance with organisational requirements
- 2 maintain up-to-date records of stock issued, received and in storage
- 3 deal with unwanted or damaged stationery and supplies safely
- 4 recommend ways in which the system for receiving and issuing stock could be improved

BUS27

Contribute to the organisation of an event



BUS27 Contribute to the organisation of an event

Level: 2

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of event organisation and the ability to carry out pre-event actions, set up an event and to carry out post-event actions

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand event organisation
2. Be able to carry out pre-event actions
3. Be able to set up an event
4. Be able to carry out post-event actions

Guided learning hours

It is recommended that **23** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

The **Event** may include, but is not limited to a:

- Meeting
- Announcement
- Celebration
- Social occasion
- Product launch

Resources may include but are not limited to:

- Human resource
- Equipment
- Materials
- Public address systems
- Information technology

Pre-event documentation may include, but is not limited to:

- Invitations
- Meeting requests
- Preparatory notes
- Agenda
- Menu
- Health & safety forms

Special requirements may include, but are not limited to:

- Wheelchair access and suitable reserved seating
- Translation or interpretation services
- Special dietary requirements
- Allergies

- Travel and accommodation bookings
- Religious or cultural requirements
- Security requirements

The **layout** includes the arrangement of furniture and other environmental features

Resources may include but are not limited to:

- Human resource
- Equipment
- Materials
- Public address systems
- Information technology

Organisational values are the general principles or standards of behaviour that are expected within an organisation

Organisational standards are defined levels of expectation for a specific behaviour set by an organisation

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS27 Contribute to the organisation of an event

Learning outcomes and assessment criteria

Outcome 1 Understand event organisation

The learner can:

- 1 explain the roles, responsibilities and accountabilities of individuals involved in the event
- 2 explain the purpose and features of different types of events
- 3 describe the type of resources needed for different types of events
- 4 describe the different needs attendees may have and how to meet these
- 5 explain the requirements of health, safety and security when organising events
- 6 describe the types of problems that may occur during events and how to deal with them

Outcome 2 Be able to carry out pre-event actions

The learner can:

- 1 identify venue requirements for an event
- 2 obtain resources within the agreed timescales
- 3 distribute pre-event documentation to delegates in accordance with the event plan
- 4 co-ordinate attendee responses within the agreed timescale
- 5 identify any special requirements of event attendees

Outcome 3 Be able to set up an event

The learner can:

- 1 set up layout and resources in accordance with the event plan
- 2 confirm that all identified resources are in place and meet requirements
- 3 behave in a way that maintains organisational values and standards

Outcome 4 Be able to carry out post-event actions

The learner can:

- 1 ensure the venue is restored to the required conditions in accordance with the terms of the contract
- 2 carry out follow-up actions in accordance with the event plan and agreements made at the event

BUS28

Organise business travel or accommodation



BUS28 Organise business travel or accommodation

Level: 2

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the organisation of business travel or accommodation for others. It also provides learners with the ability to research business travel or accommodation options for others and make business travel or accommodation arrangements to meet the requested requirements.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the organisation of business travel or accommodation for others
2. Be able to research business travel or accommodation options for others
3. Be able to make business travel or accommodation arrangements for others

Guided learning hours

It is recommended that **23** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS28 Organise business travel or accommodation

Learning outcomes and assessment criteria

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

The learner can:

- 1 explain any budgetary or policy constraints relating to business travel or accommodation
- 2 describe financial arrangements relating to business travel or accommodation
- 3 explain how to make arrangements for visas and related foreign travel documentation
- 4 describe the procedures for obtaining or exchanging foreign currency

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

The learner can:

- 1 identify different suppliers that are capable of delivering the services required within budget
- 2 recommend travel or accommodation arrangements that best meet the requirements
- 3 recommend suppliers of travel or accommodation that best meet the requirements

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

The learner can:

- 1 confirm the requirements for travel or accommodation
- 2 agree arrangements that specify any limitations, prohibitions or responsibilities and which meet the requirements
- 3 prepare and issue itinerary/schedule documentation that reflect agreed arrangements accurately
- 4 obtain travel or accommodation documentation within the required timescale
- 5 confirm the acceptability of payments to be made within the limits of their own authority
- 6 keep up-to-date records of travel or accommodation arrangements and agreed commitments
- 7 adhere to organisational policies and procedures, legal and ethical requirements when making business travel or accommodation arrangements for others

BUS29

Provide administrative support for meetings



BUS29 Provide administrative support for meetings

Level: 2

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the administration of meetings and the ability to make administrative preparations and support the administration of meetings

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the administration of meetings
2. Be able to make administrative preparations for meetings
3. Be able to support the administration of meetings

Guided learning hours

It is recommended that **28** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS29 Provide administrative support for meetings

Learning outcomes and assessment criteria

Outcome 1 Understand the administration of meetings

The learner can:

- 1 describe the purpose of the meeting and who needs to attend
- 2 explain why it is important to have a minimum number of attendees for a meeting
- 3 explain ways to achieve maximum attendance at meetings
- 4 explain the access, health, safety and security requirements relating to meetings
- 5 describe how to set up the resources needed for a meeting
- 6 explain the responsibilities of the meeting chair and meeting secretary
- 7 explain the difference between formal and informal meetings
- 8 explain the legal implications of formal meetings

Outcome 2 Be able to make administrative preparations for meetings

The learner can:

- 1 book meeting venue, resources, and facilities in accordance with the brief
- 2 collate documents needed for a meeting
- 3 distribute meeting invitations, documents and other meeting-related requirements within the timescale
- 4 confirm meeting attendees and any special requirements

Outcome 3 Be able to support the administration of meetings

The learner can:

- 1 take action to ensure that the equipment allocated for use at a meeting functions correctly
- 2 provide support to meetings in accordance with requests
- 3 ensure the venue is restored to the required conditions after the meeting
- 4 distribute meeting records promptly to the agreed distribution list
- 5 carry out any follow-up actions in accordance with the brief

BUS30

Administer human resource records



BUS30 Administer human resource records

Level: 2

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of human resource (HR) records and the ability to administer HR information.

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand the administration of human resource (HR) records
2. Be able to administer HR information

Guided learning hours

It is recommended that **28** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Organisational systems may be electronic or paper based

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS30 Administer human resource records

Learning outcomes and assessment criteria

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

The learner can:

- 1 explain what HR-related information needs to be kept and why
- 2 explain the relationship of HR to other parts of an organisation
- 3 describe the impact of other organisations on HR activities
- 4 describe the features and uses of organisational systems for managing human resource information
- 5 explain the requirements of confidentiality, data protection and system security
- 6 describe the information to be provided for different management reports
- 7 explain the limits of their own authority in administering HR records
- 8 explain the implications of not keeping HR records up-to-date
- 9 explain the actions to be taken in the event of problems arising or incomplete or inaccurate data

Outcome 2 Be able to administer HR information

The learner can:

- 1 keep HR records up-to-date
- 2 process data in accordance with organisational procedures
- 3 provide information within the limits of confidentiality
- 4 adhere to organisational policies and procedures, legal and ethical requirements

BUS31

Administer the recruitment and selection process



BUS31 Administer the recruitment and selection process

Level: 2

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of the recruitment and selection process and the ability to administer the recruitment and selection process

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the recruitment and selection process
2. Be able to administer the recruitment process
3. Be able to administer the selection process

Guided learning hours

It is recommended that **25** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Legal requirements may include, but are not limited to:

- Employment Law
- Employment Rights Act
- Equality Act 2010
- Data Protection Act 1998
- National Minimum Wage Act 1998
- Working Time Regulations 1998
- Pensions Act
- Trade Unions and Labour Relations (Consolidation) Act 92

Pre-employment checks should cover DRB/CRB, reference requests as required for the organisation/ role before commencement of employment.

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS31 Administer the recruitment and selection process

Learning outcomes and assessment criteria

Outcome 1 Understand the recruitment and selection process

The learner can:

- 1 explain the different administrative requirements of internal and external recruitment
- 2 describe the uses of a job description and a person specification
- 3 explain the administrative requirements of different methods of selection
- 4 explain the requirements of different pre-employment checks to be carried out
- 5 explain what information needs to be communicated to successful and unsuccessful applicants at each stage of the recruitment and selection process
- 6 explain the requirements of confidentiality, data protection and system security

Outcome 2 Be able to administer the recruitment process

The learner can:

- 1 check that the job or role details are correct and are in accordance with the brief
- 2 place job advertisements in the agreed media in accordance with the timescales
- 3 record applicant responses within the timescale
- 4 provide requested information to applicants in accordance with organisational policies and procedures
- 5 adhere to organisational policies and procedures, legal and ethical requirements

Outcome 3 Be able to administer the selection process

The learner can:

- 1 invite shortlisted applicants to participate in the selection process in accordance with organisational procedures
- 2 co-ordinate selection arrangements in accordance with the brief
- 3 carry out agreed pre-employment checks within the agreed timescale
- 4 inform applicants of the outcome of their application in accordance with organisational policies and procedures
- 5 keep selection records up-to-date

BUS32

Administer parking dispensations



BUS32 Administer parking dispensations

Level: 2

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of the administration of parking dispensations and the ability to process applications and to issue parking dispensations

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the administration of parking dispensations
2. Be able to process applications for parking dispensations
3. Be able to issue parking dispensations

Guided learning hours

It is recommended that **25** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Legal and regulatory requirements will be specific to the relevant authority and could include:

- Timescales for processing applications
- Circumstances in which a dispensation can be issued
- Costs associated and charged for the dispensation

Eligibility criteria could include but not be exclusive to:

- Carrying out works
- Unloading goods/materials
- Funerals
- Blood transfusion services
- Health screening
- Domestic removal
- Disabled

Requirements of confidentiality and data will be specific to the authority but must include The Data Protection Act

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS32 Administer parking dispensations

Learning outcomes and assessment criteria

Outcome 1 Understand the administration of parking dispensations

The learner can:

- 1 explain the scope and limits of their own responsibilities and authority in issuing parking dispensations
- 2 describe the legal and regulatory requirements relating to parking dispensations
- 3 describe the parking dispensation eligibility criteria and checks
- 4 describe organisational security and anti-fraud policies, procedures and processes
- 5 describe the features of software to manage the issues of permits, season tickets, suspensions, dispensations or waivers and blue badges
- 6 explain where to go for help when dealing with parking dispensations

Outcome 2 Be able to process applications for parking dispensations

The learner can:

- 1 advise customers of the eligibility criteria for parking dispensations
- 2 determine whether customers are eligible by matching the case to the criteria
- 3 clarify any areas of doubt or confusion with customers
- 4 carry out relevant checks in accordance with organisational procedures and legislative procedures
- 5 record the reasons for the decision as to whether or not to grant parking dispensations
- 6 maintain the requirements of confidentiality and data protection

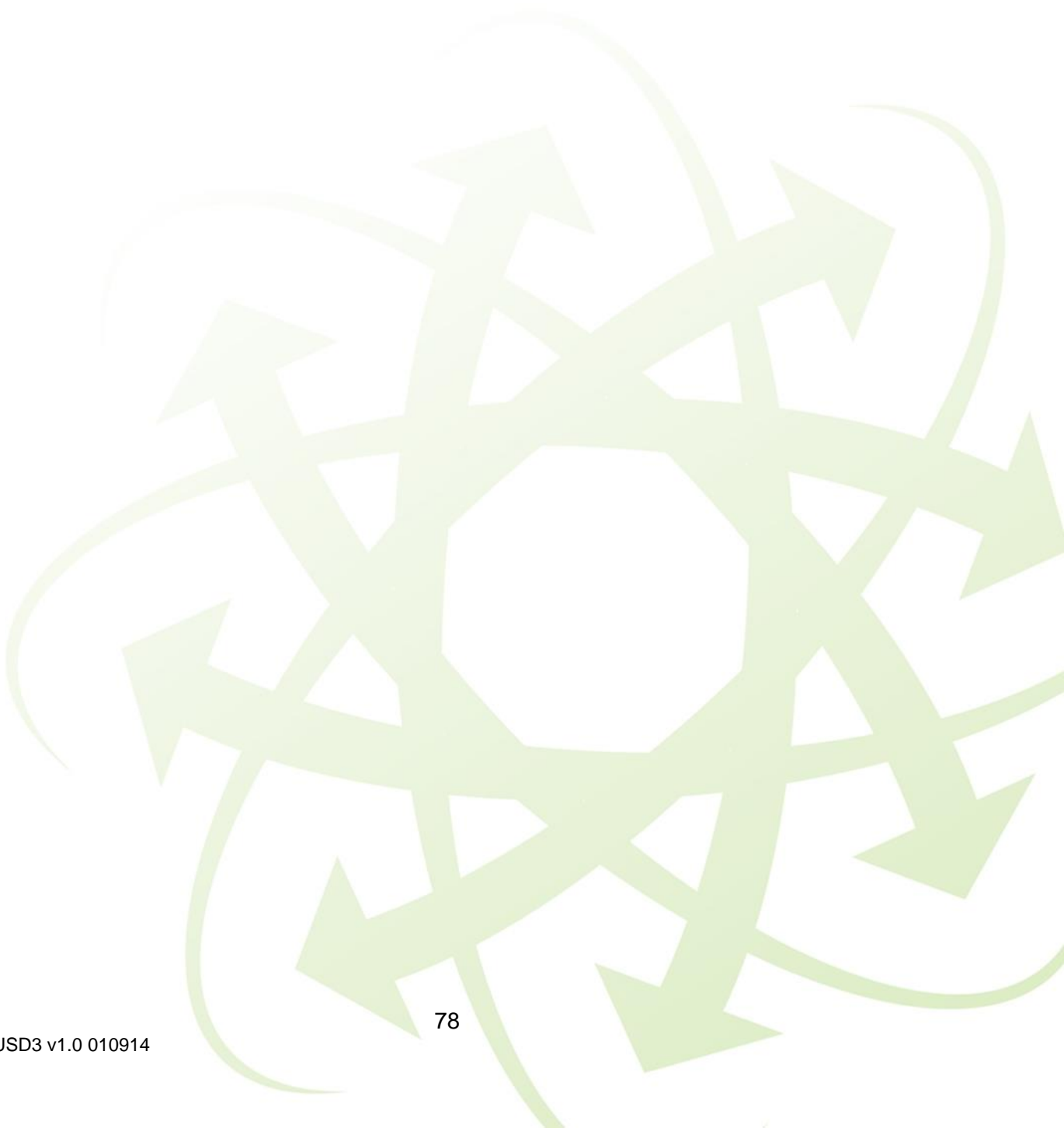
Outcome 3 Be able to issue parking dispensations

The learner can:

- 1 communicate the decision and return related paperwork on parking dispensations to customers in accordance with organisational procedures
- 2 process payments and refunds in accordance with organisational procedures
- 3 keep records up-to-date
- 4 adhere to organisational policies and procedures, legal and ethical requirements

BUS33

Administer finance



BUS33 Administer finance

Level: 2

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of finance for administrators and the ability to administer finance.

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand finance for administrators
2. Be able to administer finance

Guided learning hours

It is recommended that **21** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit..

BUS33 Administer finance

Learning outcomes and assessment criteria

Outcome 1 Understand finance for administrators

The learner can:

- 1 describe organisational hierarchy and levels of authority for financial transactions
- 2 explain organisational systems for sales invoicing, purchasing, payments and receipts
- 3 describe the use of a purchase order, invoice, receipts and expenses

Outcome 2 Be able to administer finance

The learner can:

- 1 record income and expenditure in accordance with organisational policies and procedures
- 2 process purchase orders, invoices or expenses in accordance with organisational policies and procedures
- 3 process outgoing payments to the correct recipient
- 4 accept or allocate incoming payments in accordance with organisational policies

BUS35

Buddy a colleague to develop their skills



BUS35 Buddy a colleague to develop their skills

Level: 2

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of how to buddy a colleague and the ability to plan the buddying of a colleague and to support a buddy colleague carrying out their work activities

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand how to buddy a colleague
2. Be able to plan to buddy a colleague
3. Be able to support a buddy colleague carrying out work activities

Guided learning hours

It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Techniques to give positive feedback may include:

- Medium used to provide feedback
- Giving praise
- Timing, location and approach

Techniques to establish rapport may include:

- Body language
- Listening actively
- Speech tone
- Understand strengths and weaknesses of each other
- Collaboration and partnership working
- Build objectives and aims

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS35 Buddy a colleague to develop their skills

Learning outcomes and assessment criteria

Outcome 1 Understand how to buddy a colleague

The learner can:

- 1 describe what is expected of a buddy
- 2 explain techniques to give positive feedback and constructive criticism
- 3 explain techniques to establish rapport with a buddy

Outcome 2 Be able to plan to buddy a colleague

The learner can:

- 1 agree which aspects of a colleague's work may benefit from buddying
- 2 confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague
- 3 agree a schedule of meetings that minimise disruption to business
- 4 agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives

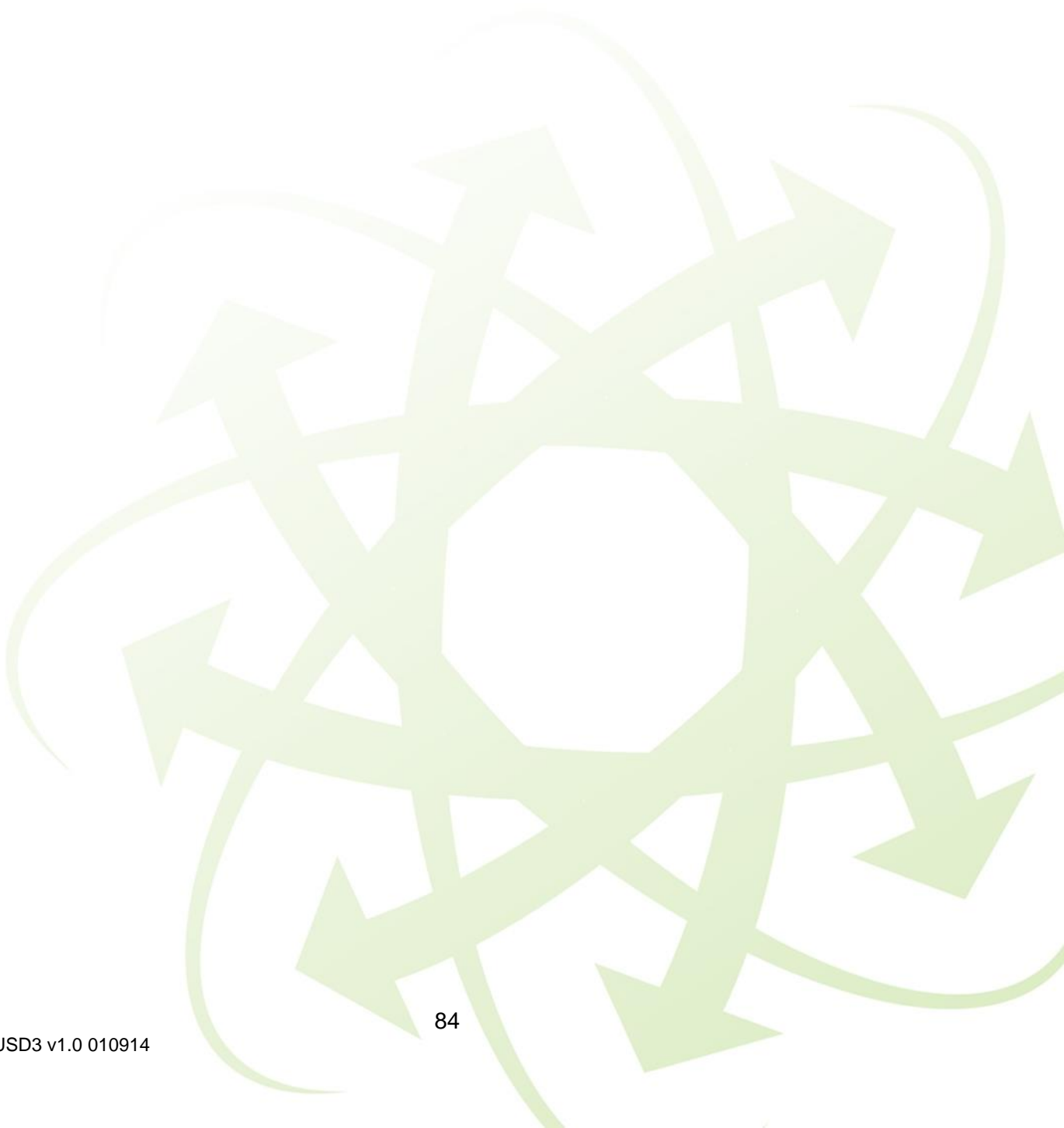
Outcome 3 Be able to support a buddy colleague carrying out work activities

The learner can:

- 1 remain unobtrusive while a buddy colleague carries out their work activities
- 2 provide examples of how to carry out tasks correctly
- 3 identify instances of good practice and areas for improvement through observation
- 4 praise a buddy colleague on well completed tasks
- 5 give constructive feedback on ways in which a buddy could improve performance
- 6 offer a buddy hints and tips based on personal experience

BUS39

Employee rights and responsibilities



BUS39 Employee rights and responsibilities

Level: 2

Credit value: 2

Unit aim

The aim of this unit is to provide learners with an understanding of the role of organisations and industries, employers' expectations and employees' rights and obligations.

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand the role of organisations and industries
2. Understand employers' expectations and employees' rights and obligations

Guided learning hours

It is recommended that **16** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS39 Employee rights and responsibilities

Learning outcomes and assessment criteria

Outcome 1 Understand the role of organisations and industries

The learner can:

- 1 explain the role of their own occupation within an organisation and industry
- 2 describe career pathways within their organisation and industry
- 3 identify sources of information and advice on an industry, occupation, training and career pathway
- 4 describe an organisation's principles of conduct and codes of practice
- 5 explain issues of public concern that affect an organisation and industry
- 6 describe the types, roles and responsibilities of representative bodies and their relevance to their own role

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

The learner can:

- 1 describe the employer and employee statutory rights and responsibilities that affect their own role
- 2 describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour
- 3 describe the procedures and documentation that protect relationships with employees
- 4 identify sources of information and advice on employment rights and responsibilities

BUS41

Contribute to the improvement of business performance



BUS41 Contribute to the improvement of business performance

Level: 3

Credit value: 6

Unit aim

The aim of this unit is to provide learners with an understanding of the principles of resolving business problems and improvement techniques and processes. It also provides learners with the ability to solve problems in business and to contribute to the improvement of activities.

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the principles of resolving business problems
2. Understand improvement techniques and processes
3. Be able to solve problems in business
4. Be able to contribute to the improvement of activities

Guided learning hours

It is recommended that **33** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Problem-solving techniques could include but are not exclusive to:

- Defining and clarifying the issue
- Gathering all the facts and understand their causes.
- Brainstorming possible options and solutions.
- Consider and compare the pros and cons of each option
- Select the best option
- Explain your decision to those involved and affected

Legal constraints refer to a limit that is set out to regulate how far a person or an organisation can go in regards to a specific matter

Stakeholders may include, but are not exclusive to:

- Shareholders
- Directors
- Colleagues and managers
- Customers
- The local community in which a business operates
- Standards agencies

Continuous improvement techniques and models could include:

- Training programmes
- Surveys
- Time studies
- Brainstorming sessions

Cost-benefit analysis refers to a systematic approach for estimating the strengths and weaknesses of different options

The **scope** of a problem refers to those affected and could include but not be exclusive to:

- Colleagues
- Departments
- Organisation
- Customers

Approval must be from the relevant higher authority

Standard operating procedures set out the method, practice and procedures specific to the organisation

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS41 Contribute to the improvement of business performance

Learning outcomes and assessment criteria

Outcome 1 Understand the principles of resolving business problems

The learner can:

- 1 explain the use of different problem-solving techniques
- 2 explain the organisational and legal constraints relating to problem-solving
- 3 describe the role of stakeholders in problem-solving
- 4 describe the steps in the business decision-making process
- 5 analyse the implications of adopting recommendations and implementing decisions to solve business problems

Outcome 2 Understand improvement techniques and processes

The learner can:

- 1 describe the purpose and benefits of continuous improvement
- 2 analyse the features, use and constraints of different continuous improvement techniques and models
- 3 explain how to carry out a cost-benefit analysis
- 4 explain the importance of feedback from customers and other stakeholders in continuous improvement

Outcome 3 Be able to solve problems in business

The learner can:

- 1 identify the nature, likely cause and implications of a problem
- 2 evaluate the scope and scale of a problem
- 3 analyse the possible courses of action that can be taken in response to a problem
- 4 use evidence to justify the approach to problem-solving
- 5 develop a plan and success criteria that are appropriate to the nature and scale of a problem
- 6 obtain approval to implement a solution to a problem
- 7 take action to resolve or mitigate a problem
- 8 evaluate the degree of success and scale of the implications of a solved problem

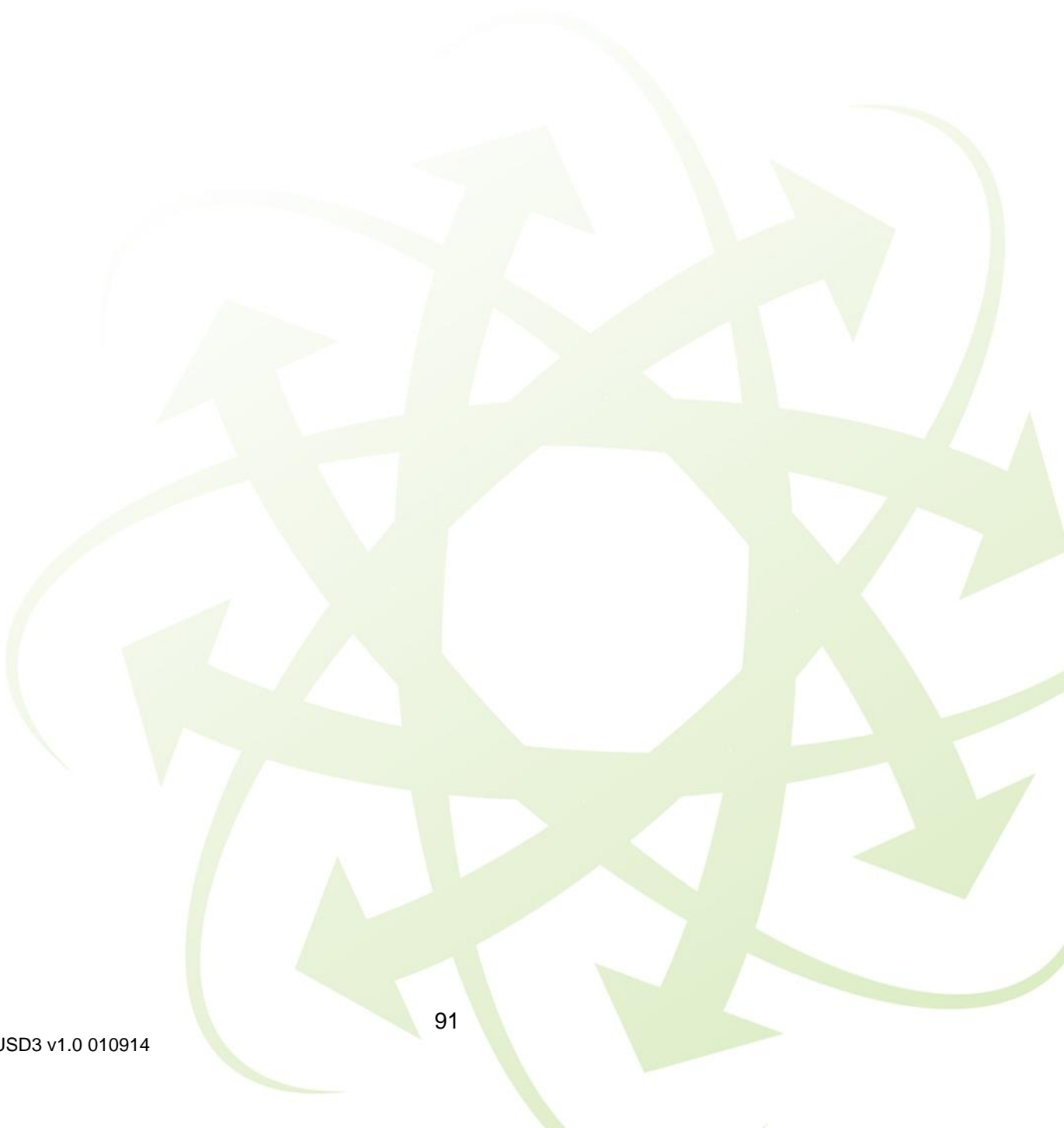
Outcome 4 Be able to contribute to the improvement of activities

The learner can:

- 1 identify the nature, scope and scale of possible contributions to continuous improvement activities
- 2 measure changes achieved against existing baseline data
- 3 calculate performance measures relating to cost, quality and delivery
- 4 justify the case for adopting improvements identified with evidence
- 5 develop standard operating procedures and resource plans that are capable of implementing agreed changes

BUS42

Negotiate in a business environment



BUS42 Negotiate in a business environment

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the principles underpinning negotiation and the ability to prepare for, and carry out, business negotiations.

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the principles underpinning negotiation
2. Be able to prepare for business negotiations
3. Be able to carry out business negotiations

Guided learning hours

It is recommended that **18** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS42 Negotiate in a business environment

Learning outcomes and assessment criteria

Outcome 1 Understand the principles underpinning negotiation

The learner can:

- 1 describe the requirements of a negotiation strategy
- 2 explain the use of different negotiation techniques
- 3 explain how research on the other party can be used in negotiations
- 4 explain how cultural differences might affect negotiations

Outcome 2 Be able to prepare for business negotiations

The learner can:

- 1 identify the purpose, scope and objectives of the negotiation
- 2 explain the scope of their own authority for negotiating
- 3 prepare a negotiating strategy
- 4 prepare fall-back stances and compromises that align with the negotiating strategy and priorities
- 5 assess the likely objectives and negotiation stances of the other party
- 6 research the strengths and weaknesses of the other party

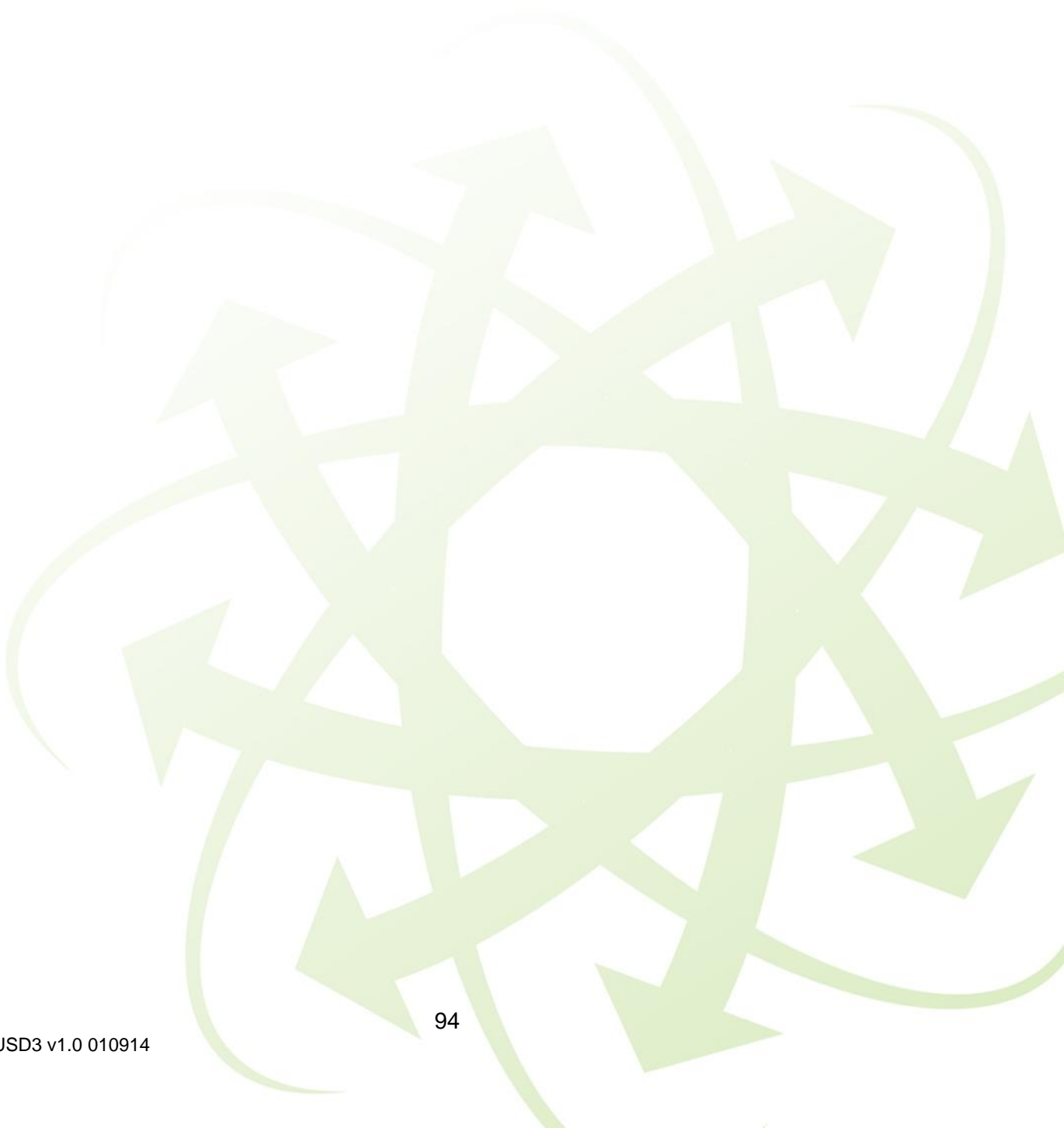
Outcome 3 Be able to carry out business negotiations

The learner can:

- 1 carry out negotiations within responsibility limits in a way that optimises opportunities
- 2 adapt the conduct of the negotiation in accordance with changing circumstances
- 3 maintain accurate records of negotiations, outcomes and agreements made
- 4 adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

BUS43

Develop a presentation



BUS43 Develop a presentation

Level: 3

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of how to develop a presentation and the ability to develop one.

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand how to develop a presentation
2. Be able to develop a presentation

Guided learning hours

It is recommended that **11** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Presentations can be electronic, paper based or verbal

Communication media refers to the manner in which the information is to be presented:

- Visually – on screen, flip chart, white board, paper
- Verbally – face to face, teleconference

Audiences could include, but not be exclusive to:

- Internal – colleagues, managers, other departments
- External – individuals, companies

Materials can include, but not be exclusive to:

- Handouts
- Models

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS43 Develop a presentation

Learning outcomes and assessment criteria

Outcome 1 Understand how to develop a presentation

The learner can:

- 1 explain best practice in developing presentations
- 2 explain who needs to be consulted on the development of a presentation
- 3 explain the factors to be taken into account in developing a presentation
- 4 analyse the advantages and limitations of different communication media

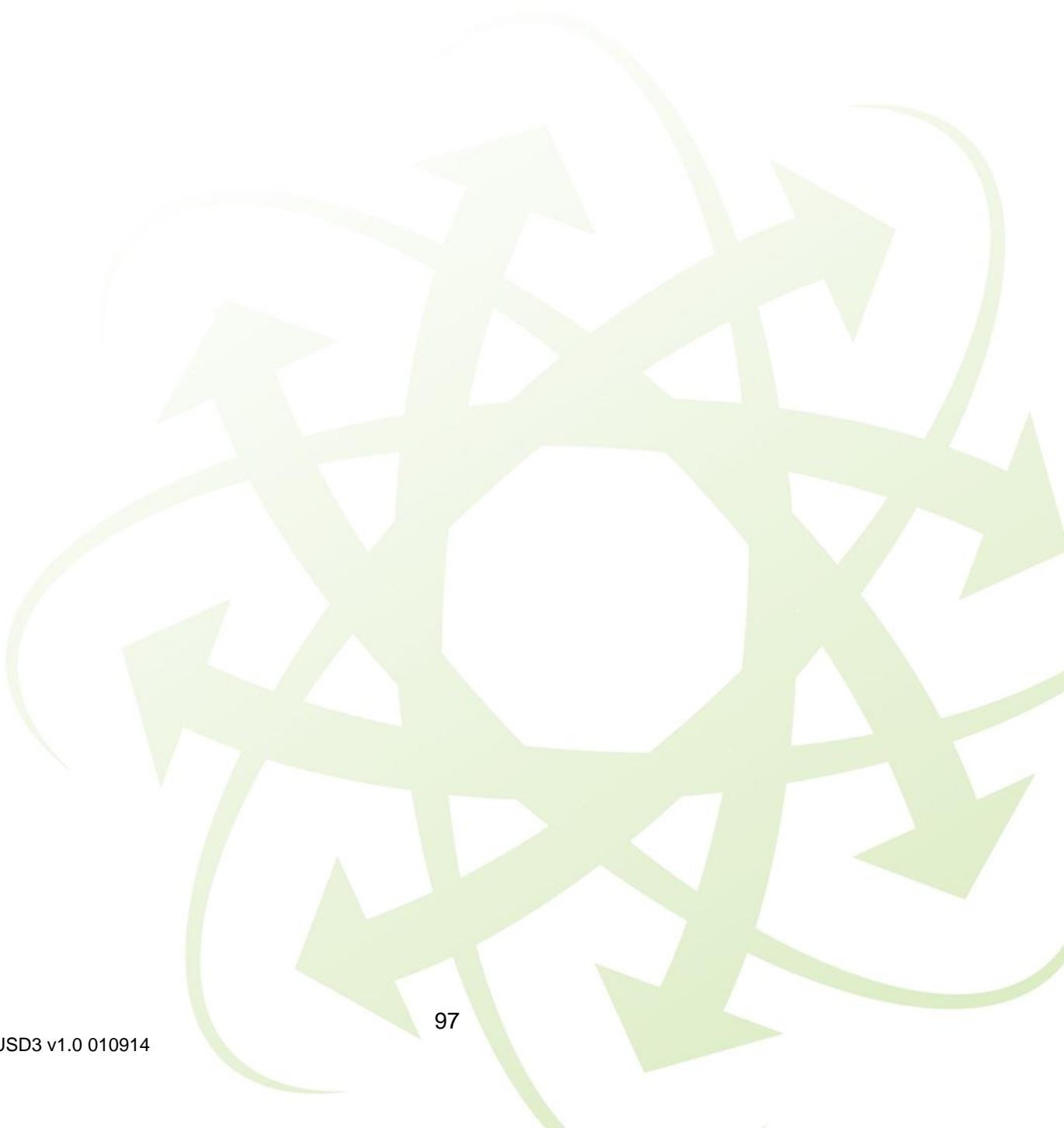
Outcome 2 Be able to develop a presentation

The learner can:

- 1 identify the purpose, content, style, timing and audience for a presentation
- 2 select a communication media that is appropriate to the nature of a presentation, message and audience
- 3 tailor a presentation to fit the timescale and audience's needs
- 4 prepare a presentation that is logically structured, summarises the content and addresses the brief
- 5 take action to ensure that a presentation adheres to organisational guidelines and policies
- 6 develop materials that support the content of a presentation

BUS44

Deliver a presentation



BUS44 Deliver a presentation

Level: 3

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of the principles underpinning the delivery of presentations. It also provides learners with the ability to prepare and to deliver a presentation

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the principles underpinning the delivery of presentations
2. Be able to prepare to deliver a presentation
3. Be able to deliver a presentation

Guided learning hours

It is recommended that **17** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Methods/media may include:

- Chalk and talk
- OHP (Overhead projection)
- Powerpoint
- Video clips
- Interactive white board
- Handouts

Contingencies may cover:

- Equipment faults
- Venue or room layout
- Insufficient resources

Factors may include:

- Timing
- Listening
- Understanding
- Considering
- Responding
- Referring

Contingency plans may include;

- Agreement for post event hand outs
- Use of USB sticks
- Secondary emergency equipment
- Pre event testing of equipment

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit



BUS44 Deliver a presentation

Learning outcomes and assessment criteria

Outcome 1 Understand the principles underpinning the delivery of presentations

The learner can:

- 1 analyse the advantages and limitations of different methods of, and media for, making presentations
- 2 explain how the type and size of the audience affects the delivery of a presentation
- 3 explain the factors to be taken into account in developing contingency plans when delivering presentations
- 4 explain voice projection and timing techniques when delivering presentations
- 5 explain the factors to be taken into account in responding to questions from an audience
- 6 explain different methods for evaluating the effectiveness of a presentation

Outcome 2 Be able to prepare to deliver a presentation

The learner can:

- 1 confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation
- 2 develop contingency plans for potential equipment and resource failure
- 3 take action to ensure that the presentation fits the time slot available

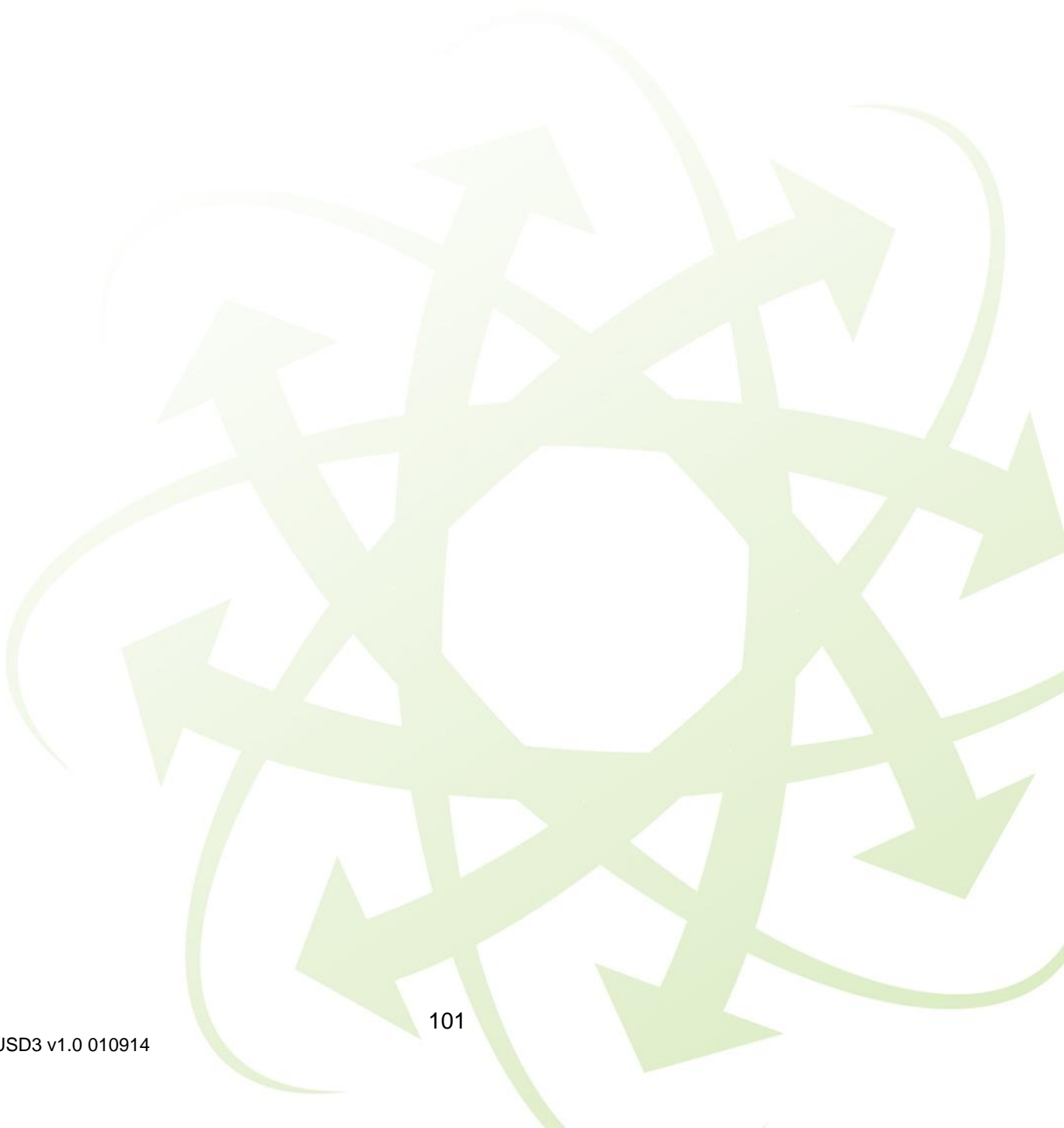
Outcome 3 Be able to deliver a presentation

The learner can:

- 1 speak clearly and confidently, using language that is appropriate for the topic and the audience
- 2 vary their voice tone, pace and volume appropriately when delivering a presentation
- 3 use body language in a way that reinforces messages
- 4 use equipment and resources effectively when delivering a presentation
- 5 deliver a presentation within the agreed time frame
- 6 respond to questions in a way that meets the audience's needs
- 7 evaluate the effectiveness of a presentation

BUS45

Create bespoke business documents



BUS45 Create bespoke business documents

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of how to create bespoke business documents and the ability to design and create bespoke business documents.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand how to create bespoke business documents
2. Be able to design bespoke business documents
3. Be able to create bespoke business documents

Guided learning hours

It is recommended that **23** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Bespoke, something that has been tailored, personalised or custom made.

Technology may include, but is not limited to:

- Word processing
- Graphic design
- Publishing software
- Online publishing
- Digital printing
- Blog, vlog and other social media formats

Corporate identity is a collection of visual elements, which are used in various applications to promote the image of an organisation

Design techniques may include, but not limited to:

- Graphic design
- Logotype
- Fonts
- Icons
- Symbols

Stakeholders may include, but are not limited to:

- Shareholders
- Directors
- Managers
- Customers
- Colleagues
- Organisations
- Members of the public

A **brief** is a set of instructions about a job or task

Non-text items may include, but are not limited to:

- Icons
- Symbols
- Images or diagrams
- Graphs or charts
- Tables
- Photographs

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.



BUS45 Create bespoke business documents

Learning outcomes and assessment criteria

Outcome 1 Understand how to create bespoke business documents

The learner can:

- 1 explain the use of bespoke business documents
- 2 describe the factors to be taken into account in selecting the appropriate method of presenting a business document
- 3 describe the use of technology to create bespoke business documents
- 4 explain the purpose and requirements of corporate identity in bespoke business documents
- 5 analyse different design techniques used to create attractive bespoke business documents
- 6 explain the factors to be taken into account in evaluating the impact of bespoke business documents

Outcome 2 Be able to design bespoke business documents

The learner can:

- 1 confirm the purpose, nature, content, style, quality standards, audience and deadline of the document
- 2 identify the optimum method of presenting the document
- 3 create design options that meet the specification
- 4 take into account feedback from stakeholders

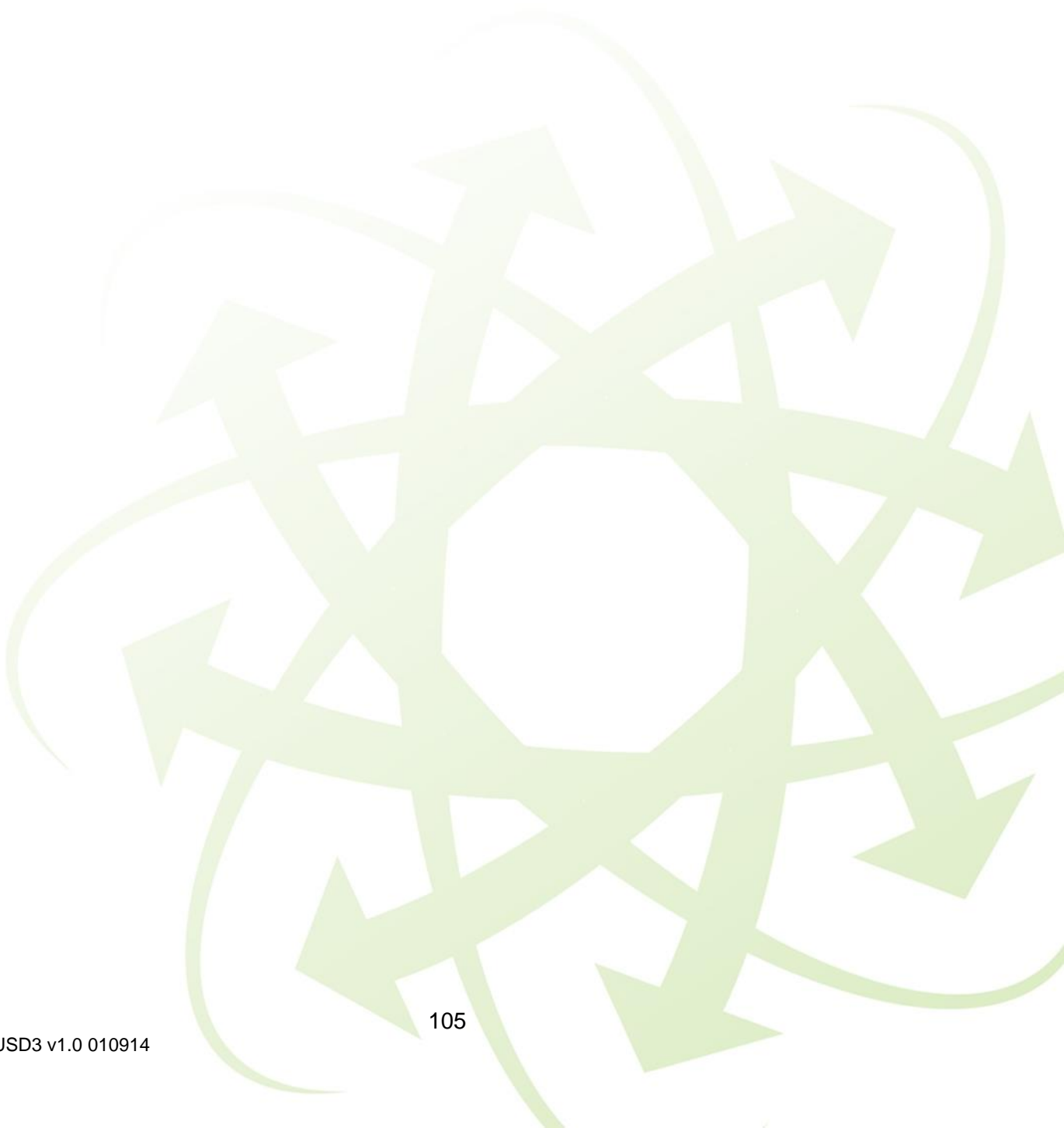
Outcome 3 Be able to create bespoke business documents

The learner can:

- 1 include content that meets the brief, is accurate and grammatically correct
- 2 use design techniques to create documents that meet the specification
- 3 integrate non-text items into the agreed layout
- 4 present documents within the agreed timescale

BUS46

Contribute to the development and implementation of an information system



BUS46 Contribute to the development and implementation of an information system

Level: 3

Credit value: 6

Unit aim

The aim of this unit is to provide learners with an understanding of the design and implementation of an information system and the ability to contribute to the development and implementation of an information system.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the design and implementation of an information system
2. Be able to contribute to the development of an information system
3. Be able to contribute to the implementation of an information system

Guided learning hours

It is recommended that **21** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS46 Contribute to the development and implementation of an information system

Learning outcomes and assessment criteria

Outcome 1 Understand the design and implementation of an information system

The learner can:

- 1 explain the types of information to be managed by a system
- 2 explain how information will be used and by whom
- 3 explain who needs to be consulted in the design and implementation of an information system and why
- 4 explain the impact of legal and organisational security and confidentiality requirements for the design and implementation of an information system

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

The learner can:

- 1 confirm the purpose, use and features of an information system
- 2 identify the information that will be managed by the system
- 3 confirm requirements for reporting information
- 4 recommend the functions that will be used to manipulate and report information
- 5 develop guidance for the use of an information system that is accurate and easy to understand
- 6 recommend user access and security levels for the information system
- 7 make contributions to the development of an information system that are consistent with business objectives and values and within budgetary constraints
- 8 participate in system tests in accordance with the specification

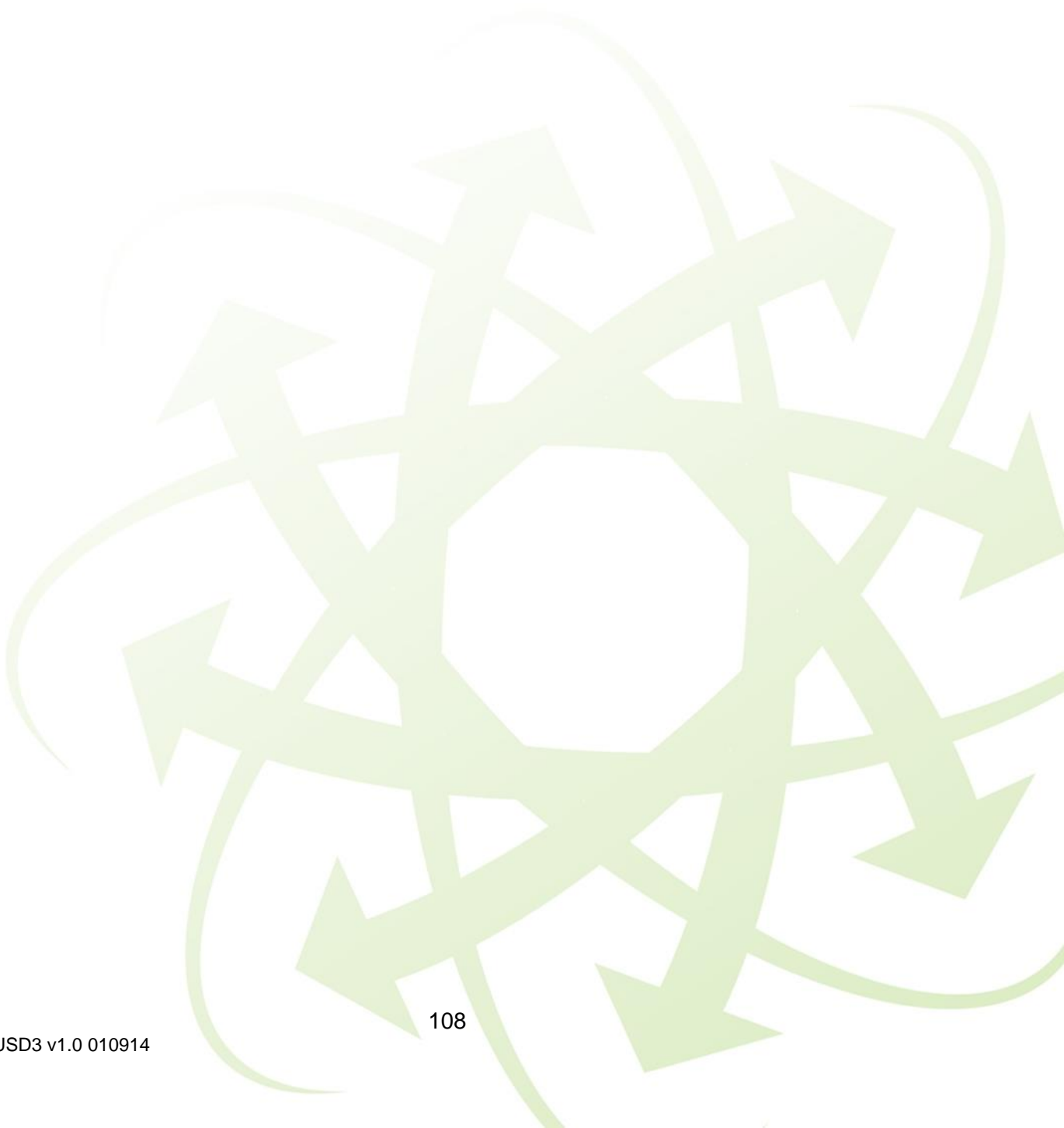
Outcome 3 Be able to contribute to the implementation of an information system

The learner can:

- 1 implement the information system in accordance with the plan, minimising disruption to business
- 2 confirm that staff are trained to use the system prior to its launch
- 3 resolve or report problems or faults with the information system within the limits of their own authority
- 4 adhere to organisational policies and procedures, and legal and ethical requirements in the implementation of an information system

BUS47

Monitor information systems



BUS47 Monitor information systems

Level: 3

Credit value: 8

Unit aim

The aim of this unit is to provide learners with an understanding of how information systems are used and the ability to monitor information systems

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand how information systems are used
2. Be able to monitor information systems

Guided learning hours

It is recommended that **43** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Information systems may include:

- Hardware
- Software
- Infrastructure

Consequences cover the effects on,

- The individual
- The organisation
- The stakeholders

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS47 Monitor information systems

Learning outcomes and assessment criteria

Outcome 1 Understand how information systems are used

The learner can:

- 1 explain how the intended use of reports affects the choice of format and language
- 2 explain how the audience of reports affects the choice of format and language
- 3 explain the features of different problem-solving techniques related to information systems
- 4 evaluate the suitability of possible problem-solving actions related to information systems
- 5 explain techniques to validate the reliability of information
- 6 analyse the suitability of different evaluation techniques related to information systems
- 7 assess the potential consequences of breaches of confidentiality
- 8 evaluate the potential consequences of publishing reports containing inaccurate or unsubstantiated information

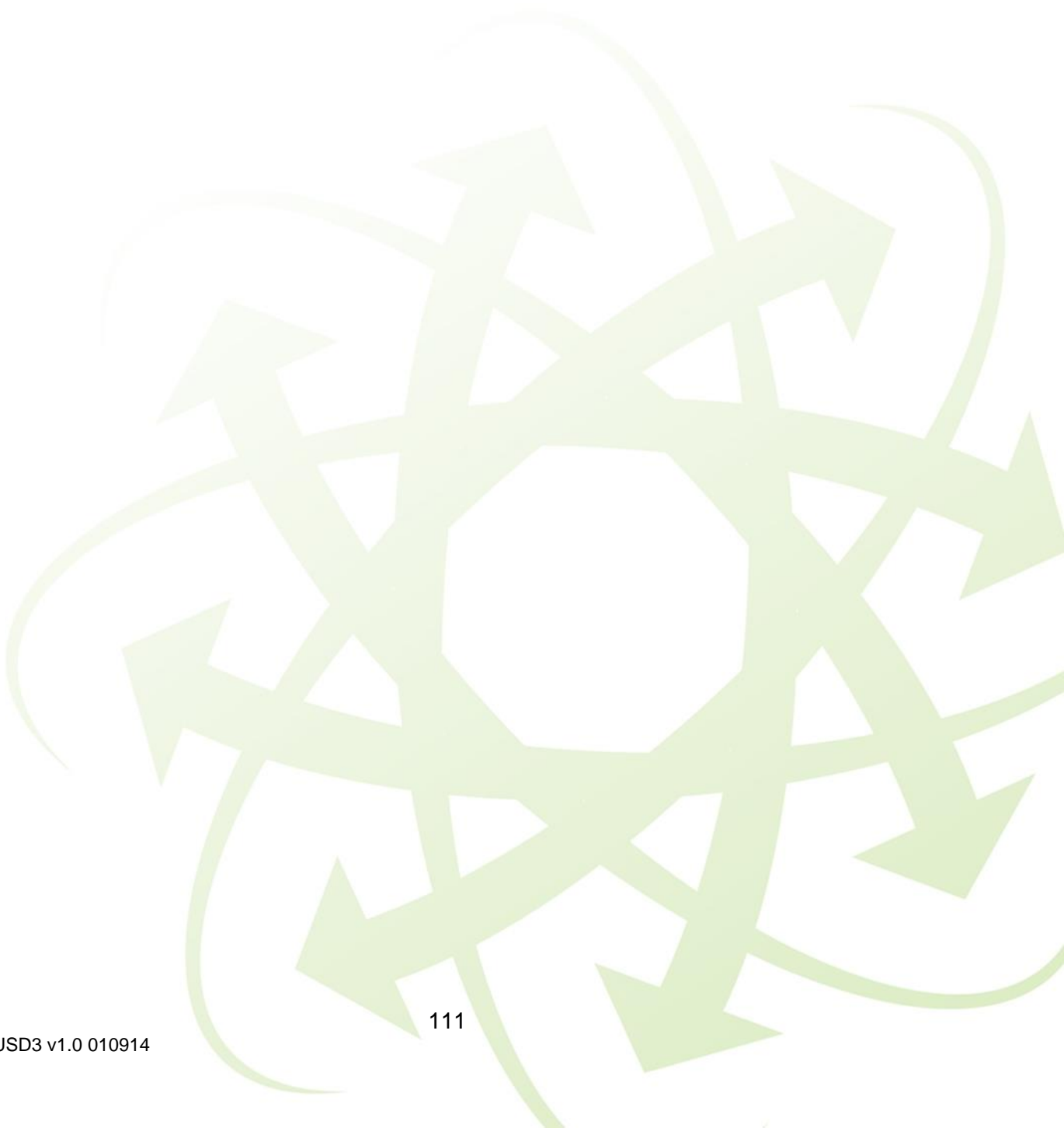
Outcome 2 Be able to monitor information systems

The learner can:

- 1 develop a plan to monitor information systems that specifies objectives, scope, timescale, resource implications, the techniques to be used and reporting requirements
- 2 carry out monitoring activities in accordance with the plan
- 3 provide training and support to system users that is appropriate to their needs
- 4 identify the cause of problems with an information system
- 5 suggest solutions to problems with an information system

BUS48

Evaluate the provision of business travel
or accommodation



BUS48 Evaluate the provision of business travel or accommodation

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of the provision of business travel or accommodation arrangements and the ability to evaluate the quality of, and recommend improvements to, organisational business travel or accommodation arrangements

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the provision of business travel or accommodation arrangements
2. Be able to evaluate the quality of organisational business travel or accommodation arrangements
3. Be able to recommend improvements to organisational business travel or accommodation arrangements

Guided learning hours

It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Evaluation criteria may include:

- Availability
- Suitability
- Effectiveness

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS48 Evaluate the provision of business travel or accommodation

Learning outcomes and assessment criteria

Outcome 1 Understand the provision of business travel or accommodation arrangements

The learner can:

- 1 explain the factors to be taken into account in setting evaluation criteria for the provision of business travel or accommodation
- 2 explain different travel or accommodation-related needs and services
- 3 explain different arrangements that could be made for the provision of business travel or accommodation
- 4 explain the scope of legal and organisational security and confidentiality requirements relating to business travel or accommodation

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

The learner can:

- 1 assess the performance of providers of travel or accommodation against agreed criteria
- 2 identify instances of exceptional and inadequate performance
- 3 evaluate the benefits and limitations of existing arrangements for organising business travel or accommodation and their implications
- 4 identify alternative potential providers and ways of providing travel or accommodation

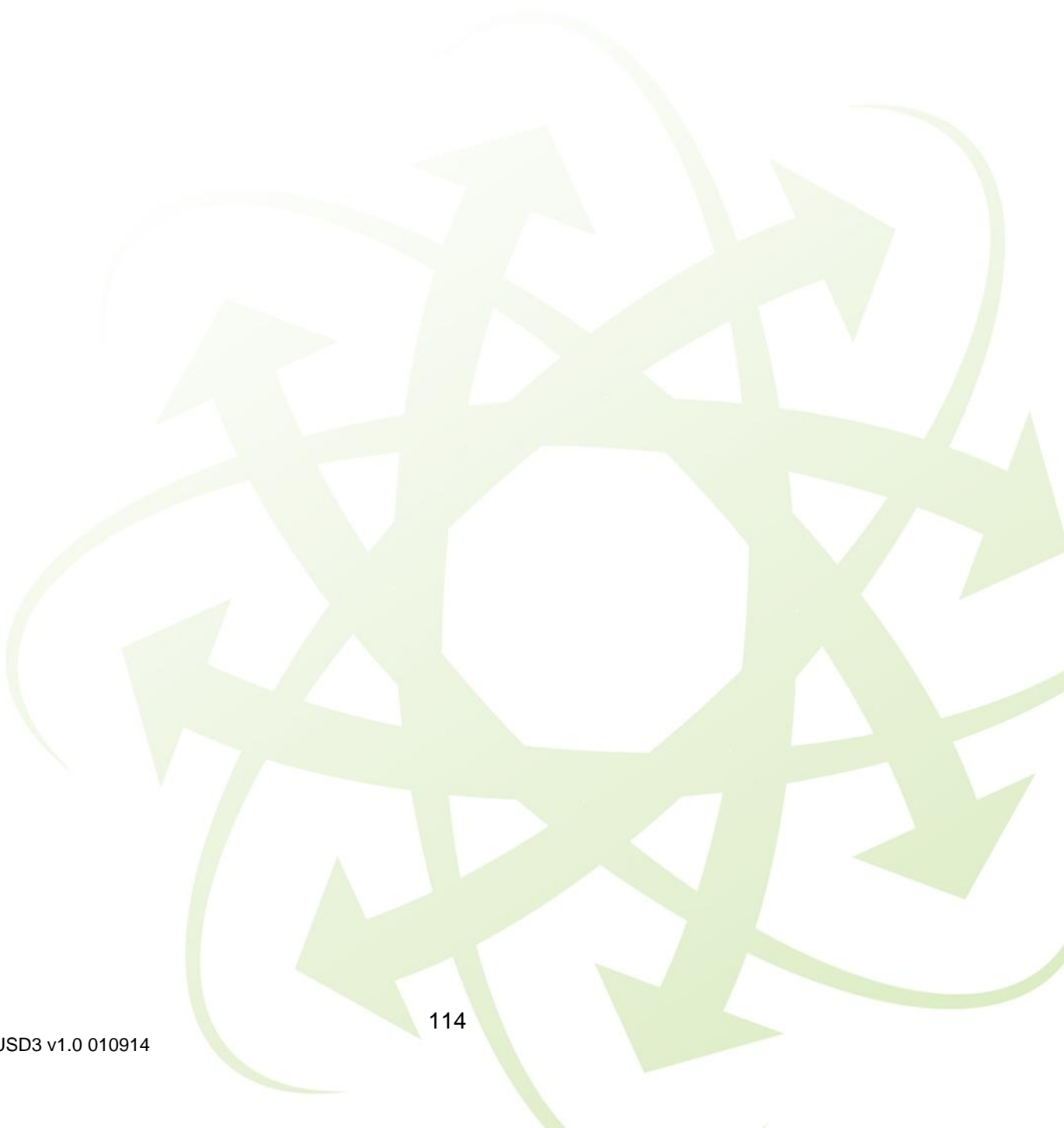
Outcome 3 Be able to recommend improvements to organisational business travel or accommodation arrangements

The learner can:

- 1 produce costed plans that set out different options, their benefits, limitations and implications
- 2 shortlist alternative potential providers of business travel or accommodation against agreed criteria
- 3 adhere to organisational policies and procedures, and legal and ethical requirements when recommending improvements to arrangements for business travel or accommodation

BUS49

Provide administrative support in schools



BUS49 Provide administrative support in schools

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of administration within a school environment and the ability to provide administrative services and to operate school administrative systems and procedures.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand administration within a school environment
2. Be able to provide administrative services
3. Be able to operate school administrative systems and procedures

Guided learning hours

It is recommended that **33** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Documents:

- Letters
- E-mails
- Reports
- Text messages
- Newsletters
- Information notices

Present reports according to:

- Limits of own responsibility
- The school's agreed procedure
- The standard set by the relevant public / private education authority

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS49 Provide administrative support in schools

Learning outcomes and assessment criteria

Outcome 1 Understand administration within a school environment

The learner can:

- 1 analyse the scope, use and requirements of a school administrative system
- 2 explain how their own role contributes to the achievement of a school's goals
- 3 describe the policy context, issues and initiatives that affect the work of a school administrator
- 4 explain a school's administration policy and procedures for dealing with others
- 5 explain the requirements and procedures for dealing with child protection and student welfare
- 6 explain when it may be appropriate to override the requirement to maintain confidentiality

Outcome 2 Be able to provide administrative services

The learner can:

- 1 build positive working relationships with others
- 2 present a professional and friendly image in line with school policy
- 3 coordinate the content and publishing of documents in accordance with the brief
- 4 organise trips, events, placements, secondments or work experience in accordance with the brief
- 5 maintain facilities to the required standard
- 6 adhere to organisational policies and procedures, and legal and ethical requirements when providing administrative services

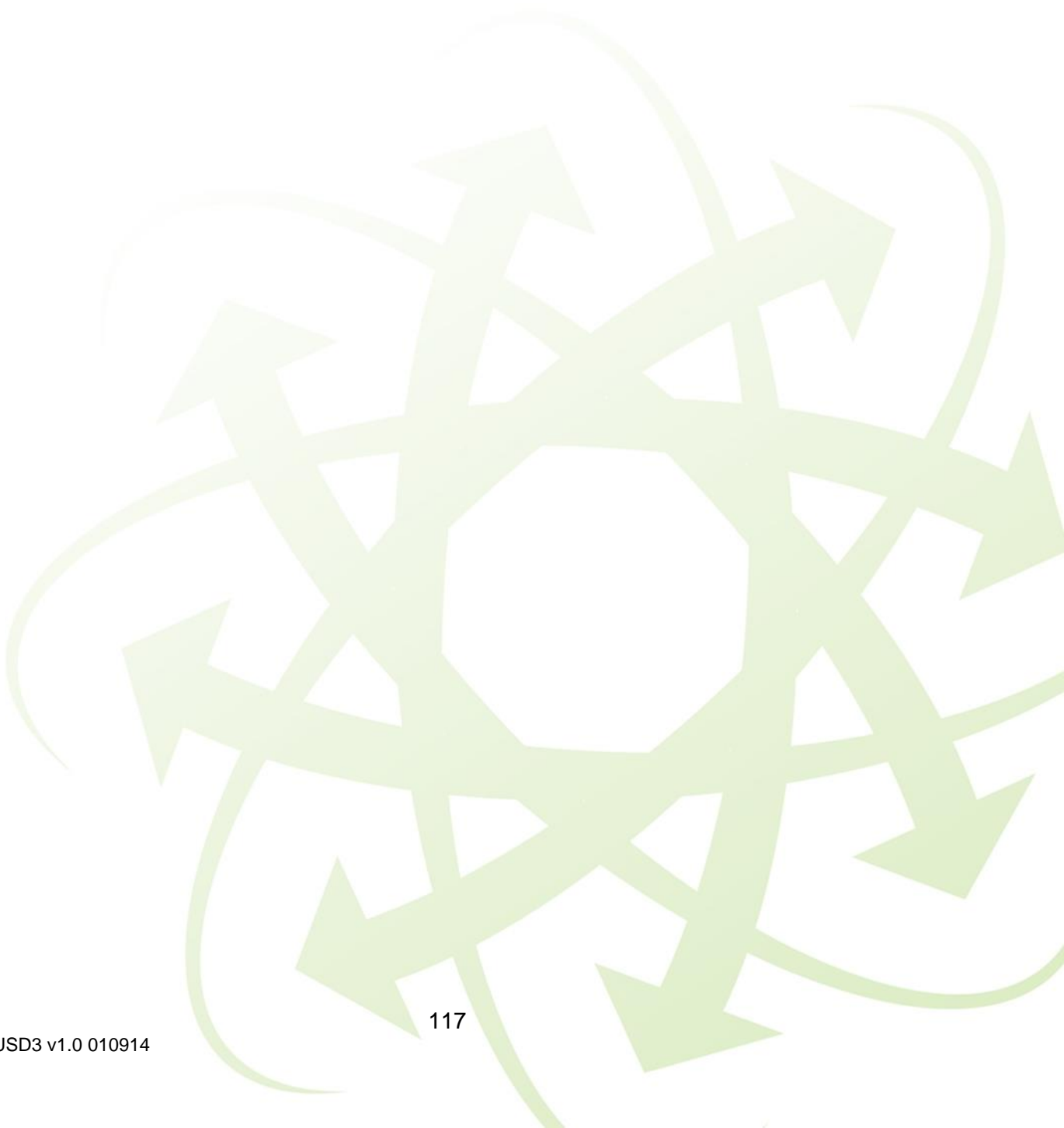
Outcome 3 Be able to operate school administrative systems and procedures

The learner can:

- 1 maintain accurate records
- 2 maintain the currency of registers, licences and contracts
- 3 present reports and statistical returns on time in the agreed format
- 4 select analysis and evaluation techniques that are appropriate to the purpose of the report and the nature of the information

BUS50

Administer parking and traffic challenges,
representations and civil parking appeals



BUS50 Administer parking and traffic challenges, representations and civil parking appeals

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of the administration of parking and traffic challenges and the ability to process the receipt of, and to respond to, challenges, representations and CPN appeals.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the administration of parking and traffic challenges
2. Be able to process the receipt of challenges, representations and CPN appeals
3. Be able to respond to challenges, representations and CPN appeals

Guided learning hours

It is recommended that **31** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Codes of practice will be specific to the relevant authority

Specialist software could include:

- Parking management systems
- E-permits
- Third party interface e.g. with the DVLA or police

Eligibility criteria could relate to:

- Carrying out works
- Unloading goods/materials
- Funerals
- Blood transfusion services
- Health screening
- Domestic removals
- Disabled

Obtaining additional evidence must be done in accordance with legal and regulatory requirements and in accordance with the policies of the authority

The **agreed timescale** will be specific to the relevant authority

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS50 Administer parking and traffic challenges, representations and civil parking appeals

Learning outcomes and assessment criteria

Outcome 1 Understand the administration of parking and traffic challenges

The learner can:

- 1 explain the provisions and constraints of relevant legislation, codes of practice, Traffic Regulation Orders and the Data Protection Act
- 2 explain how to access, use and interpret the information needed to process challenges, representations and Civil Parking Notice (CPN) appeals
- 3 evaluate the importance of keeping accurate and up to date records of information and decisions
- 4 explain how to validate information in the administration of parking and traffic challenges
- 5 explain the features and use of specialist software to process and record challenges, representations and CPN appeals
- 6 explain the types of internal evidence needed to support reliable decisions for the administration of parking and traffic challenges
- 7 explain when and why it may be appropriate to reactivate the enforcement process

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

The learner can:

- 1 record the receipt of written challenges, representations and CPN appeals
- 2 confirm that the information is complete, accurate, consistent and valid
- 3 decide whether to allow or uphold the appeal against recognised eligibility criteria
- 4 provide accurate advice and information on the progress and outcome of the case

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

The learner can:

- 1 confirm that the information is complete, accurate, consistent and valid
- 2 suspend the enforcement process while cases are being investigated
- 3 obtain additional evidence where gaps are identified
- 4 seek appropriate advice on cases beyond their level of authority
- 5 refer cases beyond their level of authority to the right person
- 6 inform customers of the decision and possible courses of action they can take within the agreed timescale
- 7 adhere to organisational policies and procedures, and legal and ethical requirements when responding to challenges, representations and CPN appeals

BUS51

Administer statutory parking and traffic appeals



BUS51 Administer statutory parking and traffic appeals

Level: 3

Credit value: 6

Unit aim

The aim of this unit is to provide learners with an understanding of the administration of statutory parking and traffic appeals and the ability to prepare case evidence for, and to contest, statutory parking and traffic appeals. This unit will also provide learners with an ability to investigate cases for statutory appeals.

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the administration of statutory parking and traffic appeals
2. Be able to prepare case evidence for statutory parking and traffic appeals
3. Be able to investigate cases for statutory appeals
4. Be able to contest statutory parking and traffic appeals

Guided learning hours

It is recommended that **42** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Relevant legislation:

- Traffic Management Act 2004
- Data Protection Act 1998
- Protection of Freedoms Act 2012
- Road Traffic Regulation Act 1984
- Road Traffic Act 1991
- Consumer law
- Equalities law

Codes of practice:

- Approved Operator Scheme (AOS) private land

Statement of Truth: a signed written statement to verify that the information contained within a set of documents is true.

Specialist software such as:

- Customer Relationship Management (CRM) database
- Microsoft Access
- Bespoke software

Recovery process: to prepare a Warranty of Execution to recover costs using external debt recovery agencies/bailiffs

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.



BUS51 Administer statutory parking and traffic appeals

Learning outcomes and assessment criteria

Outcome 1 Understand the administration of statutory parking and traffic appeals

The learner can:

- 1 explain the requirements, rules and constraints of relevant legislation, codes of practice and the Data Protection Act
- 2 explain the grounds on which someone may appeal and on which they may file a statement of truth
- 3 explain the evidence needed to carry out an investigation
- 4 explain how to validate information for statutory parking and traffic appeals
- 5 explain the requirements for preparing and presenting a case summary
- 6 explain the preparations and codes of conduct relating to attending a hearing for statutory parking and traffic appeals
- 7 describe the actions needed to close a case and refund fees
- 8 explain who needs to be informed of the outcomes of a statutory appeal and why
- 9 explain the features of specialist software to process and record statutory appeals
- 10 explain the potential consequences of not acting within the given deadline
- 11 explain when and why an appeal may be referred by an adjudicator to an independent person to consider mitigation
- 12 explain the actions needed to reactivate the recovery process after the failure of statutory parking and traffic appeals

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

The learner can:

- 1 record the receipt of statutory appeal notifications or revocation orders
- 2 confirm that the information is accurate and consistent
- 3 notify the right person of any discrepancies
- 4 meet the requirements of the deadline

Outcome 3 Be able to investigate cases for statutory appeals

The learner can:

- 1 confirm that the information supplied is accurate, valid and reliable
- 2 obtain additional evidence where gaps are identified
- 3 refer cases beyond their own level of authority to the right person
- 4 make and record decisions in statutory appeal cases on the basis of the evidence provided
- 5 keep the adjudicator and appellant or respondent informed of progress and outcomes
- 6 adhere to organisational policies and procedures, and legal and ethical requirements when investigating cases for statutory appeals

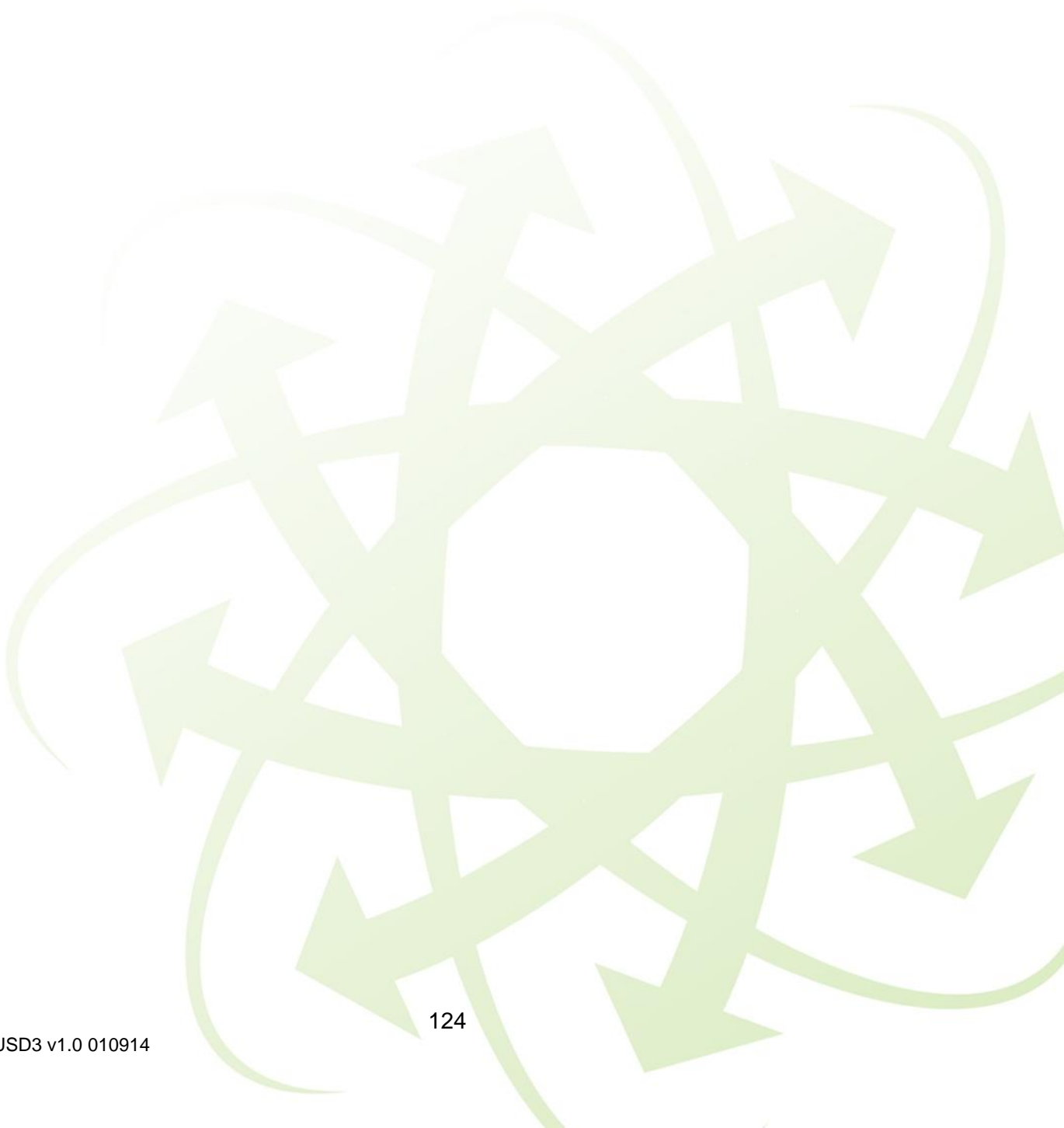
Outcome 4 Be able to contest statutory parking and traffic appeals

The learner can:

- 1 prepare a case summary in accordance with organisational guidelines and codes of practice
- 2 collate, label and present documentation in the format required by the appeals service
- 3 respond promptly to requests for further information
- 4 inform everyone who needs to know of the outcomes of a statutory appeal
- 5 keep accurate records of information and decisions made

BUS52

Administer parking and traffic debt recovery



BUS52 Administer parking and traffic debt recovery

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of the parking and traffic debt recovery process and the ability to administer it.

Learning outcomes

There are **two** outcomes to this unit. The learner will:

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

Guided learning hours

It is recommended that **35** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Relevant legislation could include the:

- Traffic Signs Regulations and General Directions
- Traffic Management Act

The **codes of practice** will be specific to the authority

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS52 Administer parking and traffic debt recovery

Learning outcomes and assessment criteria

Outcome 1 Understand the parking and traffic debt recovery process

The learner can:

- 1 explain the requirements, rules and constraints of relevant legislation, codes of practice and the Data Protection Act
- 2 explain the criteria, policy and procedures relating to debt recovery
- 3 analyse the role of the Traffic Enforcement Centre and magistrates' court in the debt recovery process
- 4 explain the requirements of debt recovery documentation
- 5 explain the features and benefits of different investigation techniques
- 6 explain who needs to be informed of the outcomes of the debt recovery process and why
- 7 explain the actions to be taken at each stage of the debt recovery process
- 8 explain the potential consequences of an inadequate audit trail
- 9 explain the actions needed to close a debt recovery case

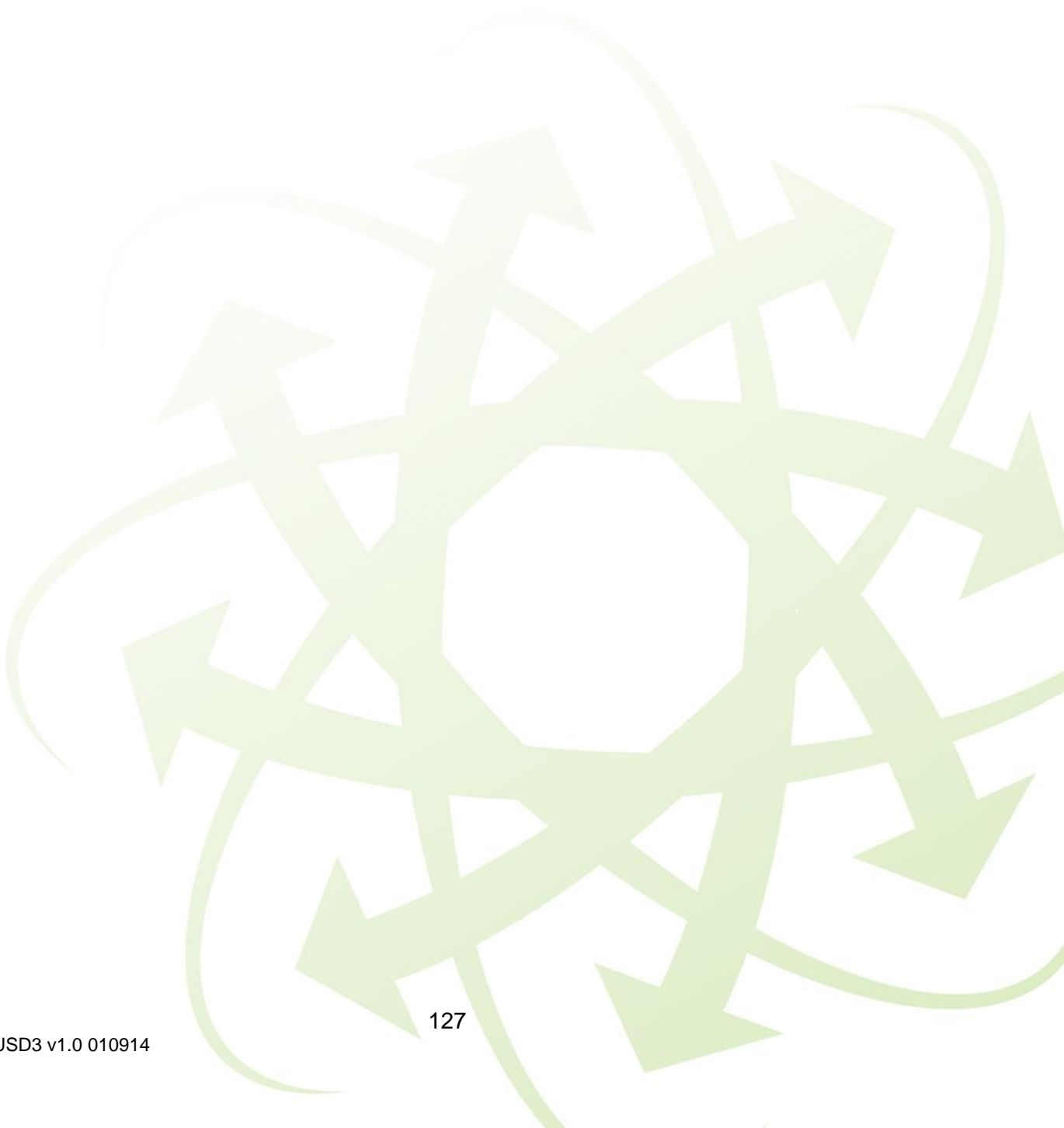
Outcome 2 Be able to administer the parking and traffic debt recovery process

The learner can:

- 1 monitor the quality of the data to be registered at the Traffic Enforcement Centre or magistrates' court
- 2 serve debt recovery documentation in accordance with organisational policy and relevant legislation
- 3 prepare case evidence in accordance with organisational policy and relevant legislation
- 4 make decisions on the basis of the evidence within the limits of their own authority
- 5 inform everyone who needs to know of the progress and outcomes of the case
- 6 monitor the performance of debt recovery agents
- 7 take prompt action in the event of problems arising in the debt recovery process
- 8 keep accurate and up-to-date records of actions and decisions taken
- 9 adhere to organisational policies and procedures, and legal and ethical requirements when administering the parking and traffic debt recovery process

BUS53

Administer legal files



BUS53 Administer legal files

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of the administration of legal files and then ability to maintain, close and archive a legal file

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the administration of legal files
2. Be able to maintain a legal file
3. Be able to close and archive a legal file

Guided learning hours

It is recommended that **31** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Learners should be able to explain the different legal areas they themselves are responsible for. They should also have a generic awareness of other **legal areas** which exist within their place of work.

The explanation of the **duty of confidentiality** should include relevant and current legislation and practical implications.

For ACs 1.6 and 1.7 the description/explanation should include reference to appropriate **regulation** and demonstrate an understanding of internal **organisational** procedures. It should also include the **purpose** and potential implications of non-compliance.

Learners should be able to explain how they know that the **information on file** is complete, accurate and valid.

In order to achieve AC 2.3 an understanding of the organisational structure is required.

Outstanding issues can be identified as part of 2.1 above but the learner should also demonstrate that they take action to address issues

It is not necessary to demonstrate an in depth understanding of the **firm's precedent, knowledge or data bank** but the learner should have a system for establishing whether documents should be added.

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS53 Administer legal files

Learning outcomes and assessment criteria

Outcome 1 Understand the administration of legal files

The learner can:

- 1 explain the administrative requirements of the different legal areas being administered
- 2 explain the scope and limits of their own responsibilities and authority
- 3 explain the requirements of the duty of confidentiality
- 4 explain the use of specialist software for processing legal cases
- 5 explain the potential consequences of inadequate or inaccurate record keeping
- 6 describe the organisational and regulatory purpose and nature of different legal checks and searches
- 7 explain the organisational and regulatory purpose of a client care letter
- 8 explain how records of time spent on work are used

Outcome 2 Be able to maintain a legal file

The learner can:

- 1 confirm that information on file is complete, accurate and valid
- 2 process money received from clients in accordance with organisational and regulatory requirements
- 3 keep fee-earners informed of actions taken, progress, developments and problems
- 4 take action to ensure that files are correctly labelled and dated including summaries of their contents
- 5 generate correspondence that conform with the requirements of house style
- 6 record all time spent, costs and disbursements accurately
- 7 generate accurate bills that conform with organisational and regulatory requirements
- 8 adhere to organisational policies and procedures, and legal and ethical requirements when maintaining a legal file

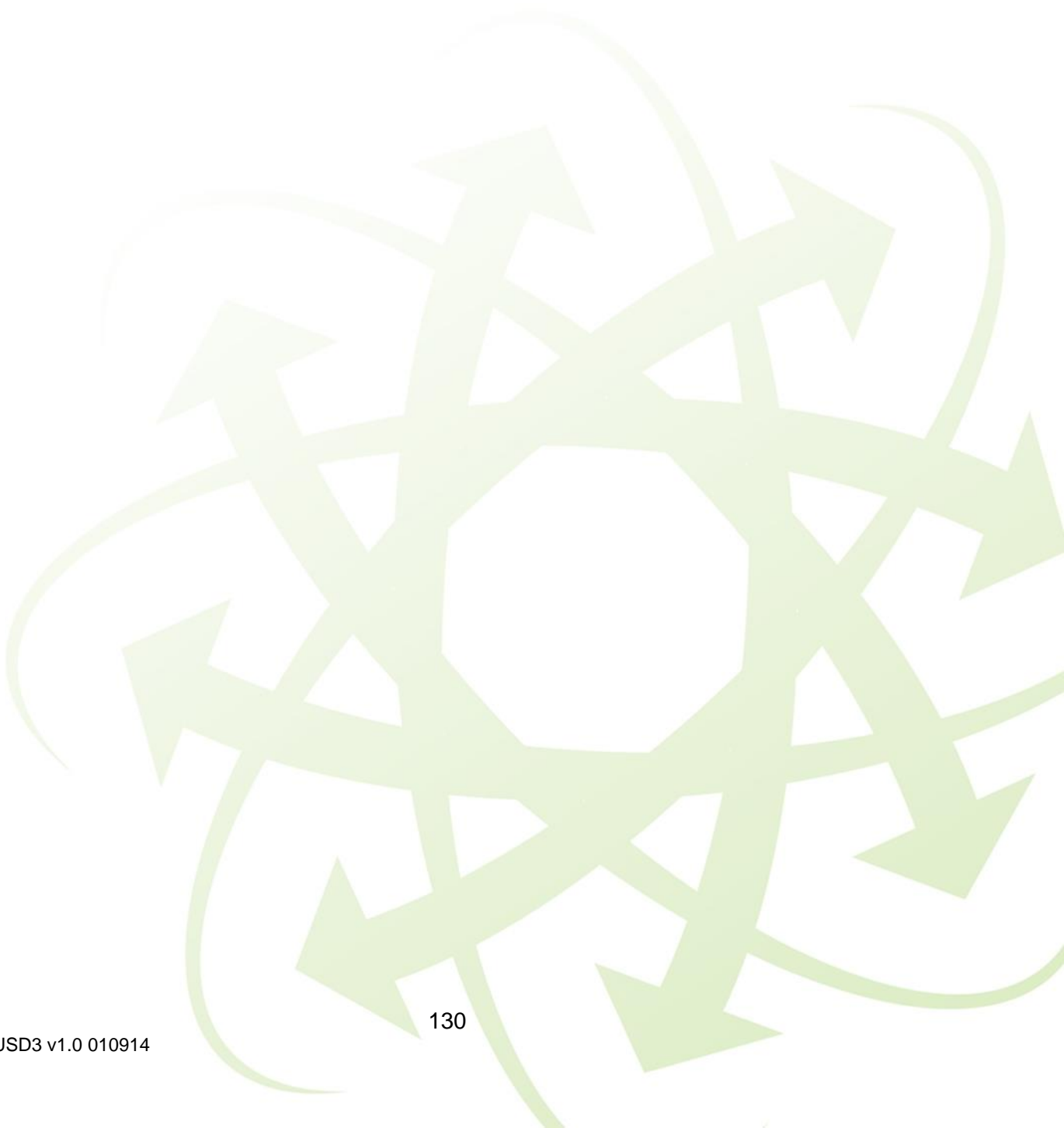
Outcome 3 Be able to close and archive a legal file

The learner can:

- 1 address any outstanding issues for a legal file
- 2 prepare accurate final bills in accordance with organisational and regulatory requirements
- 3 take action to ensure that closed files contain all the necessary documentation
- 4 confirm whether any documents need to be added to the firm's precedent, knowledge or data bank
- 5 close files in accordance with organisational standards and procedures when the account shows a nil balance
- 6 archive files in accordance with organisational and regulatory requirements

BUS54

Build legal case files



BUS54 Build legal case files

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of how to, and the ability to, build legal case files

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand how to build legal case files
2. Be able to build case files

Guided learning hours

It is recommended that **32** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Legal areas will be defined by the learner's workplace

Shortfall is a failure to attain a specified amount or level; a shortage.

Interviewing techniques may include but are not limited to:

- Listening
- Questioning
- Advising
- Taking instruction

Best practice means commercial or professional procedures that are accepted or prescribed as being correct or most effective

A **house style** is a company's preferred manner of presentation and layout of written material

A **case file** is a collection of documents and evidence relating to a particular legal case

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS54 Build legal case files

Learning outcomes and assessment criteria

Outcome 1 Understand how to build legal case files

The learner can:

- 1 explain the administrative requirements of the different legal areas being administered
- 2 explain the scope and limits of their own responsibilities and authority
- 3 explain the requirements of the duty of confidentiality
- 4 explain how to identify shortfalls in evidence and materials
- 5 explain the features and uses of different interviewing techniques
- 6 explain the use of specialist software for processing legal cases
- 7 explain how to access and use sources of information and evidence
- 8 explain the potential consequences of not meeting deadlines when building a legal case file

Outcome 2 Be able to build case files

The learner can:

- 1 identify gaps in evidence and materials needed
- 2 carry out interviews in accordance with the principles of best practice in communication and interviewing
- 3 obtain evidence and materials needed to complete the file
- 4 generate correspondence that conforms with the house style and regulatory requirements
- 5 submit cases on time in line with internal and external deadlines
- 6 complete follow-up actions in accordance with the instructions
- 7 adhere to organisational policies and procedures, and legal and ethical requirements when building case files

BUS55

Manage legal case files



BUS55 Manage legal case files

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of the management of, and the ability to manage, legal case files

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand the management of legal case files
2. Be able to manage case files

Guided learning hours

It is recommended that **32** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS55 Manage legal case files

Learning outcomes and assessment criteria

Outcome 1 Understand the management of legal case files

The learner can:

- 1 explain the administrative requirements of the different legal areas being administered
- 2 explain the scope and limits of their own responsibilities and authority
- 3 explain the requirements of the duty of confidentiality
- 4 describe the structure, format and contents of a case file
- 5 explain how to validate information when managing a legal case file
- 6 explain the requirements of processing appeals
- 7 explain the potential consequences of not meeting internal and external deadlines when managing a legal case file

Outcome 2 Be able to manage case files

The learner can:

- 1 plan the management of a case file to meet deadlines
- 2 identify the location of required documents and materials
- 3 take action to ensure the file contains accurate and up-to-date information, documents and materials and is secure
- 4 take action to ensure court bundles are prepared correctly
- 5 generate correspondence and documents that conform with the requirements of house style and legal and procedural requirements
- 6 submit documents on time
- 7 process and record the hearing outcomes in accordance with organisational and procedural requirements
- 8 close and archive files in accordance with organisational and regulatory requirements
- 9 keep fee-earners informed of actions taken, progress, developments and problems
- 10 adhere to organisational policies and procedures, and legal and ethical requirements when managing case files

BUS60

Manage an office facility



BUS60 Manage an office facility

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the management of, and the ability to manage and maintain an office facility.

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand the management of an office facility
2. Be able to manage and maintain an office facility

Guided learning hours

It is recommended that **21** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Users may include, but are not limited to:

- colleagues
- customers

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS60 Manage an office facility

Learning outcomes and assessment criteria

Outcome 1 Understand the management of an office facility

The learner can:

- 1 explain the requirements of establishing and implementing office management procedures
- 2 explain how to manage the effectiveness of work and systems
- 3 explain how to manage any constraints attached to office facilities and related budgets
- 4 explain the factors to be taken into account in the design of office systems, procedures and guidance documents
- 5 explain how to create an environment that is conducive to productive work

Outcome 2 Be able to manage and maintain an office facility

The learner can:

- 1 maintain equipment and consumables to agreed levels
- 2 establish systems to evaluate the effectiveness of office systems and procedures
- 3 review the effectiveness of office systems and procedures to meet users' needs, adapting them to meet changing demands
- 4 manage the maintenance of office equipment to meet users' needs and expectations
- 5 manage effective relationships with suppliers
- 6 take action to ensure that administrative services are provided to agreed standards

BUS61

Analyse and present business data



BUS61 Analyse and present business data

Level: 3

Credit value: 6

Unit aim

The aim of this unit is to provide learners with an understanding of the analysis and presentation of business data and the ability to analyse quantitative and qualitative business data and to present the analysis of that business data in the agreed reporting format and house style.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the analysis and presentation of business data
2. Be able to analyse quantitative and qualitative business data
3. Be able to present the analysis of business data

Guided learning hours

It is recommended that **24** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Techniques may include,

- Comparing
- Contrasting
- Measuring
- Monitoring

Conclusions:

- Within limits of own responsibility
- Linked to original brief
- In agreed format

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS61 Analyse and present business data

Learning outcomes and assessment criteria

Outcome 1 Understand the analysis and presentation of business data

The learner can:

- 1 explain the uses and limitations of primary and secondary data
- 2 explain the uses and limitations of quantitative and qualitative data
- 3 evaluate the issues relating to the validity and reliability of data and its analysis
- 4 explain the use of IT tools to carry out research
- 5 assess the risks attached to making judgments based on limited or unrepresentative samples
- 6 assess the risks attached to generalizing research findings
- 7 explain different formats and techniques for the presentation of the analysis

Outcome 2 Be able to analyse quantitative and qualitative business data

The learner can:

- 1 agree the parameters of the analysis
- 2 clarify any ethical requirements of the analysis
- 3 organise the data in a way that will facilitate its analysis
- 4 select valid and reliable data analysis methods and techniques that are appropriate to the data and analysis objectives
- 5 apply analytical techniques that are appropriate to the purpose of the research and the nature of the data
- 6 confirm the accuracy of data analysis and make necessary adjustments
- 7 draw conclusions that are valid and supported by evidence

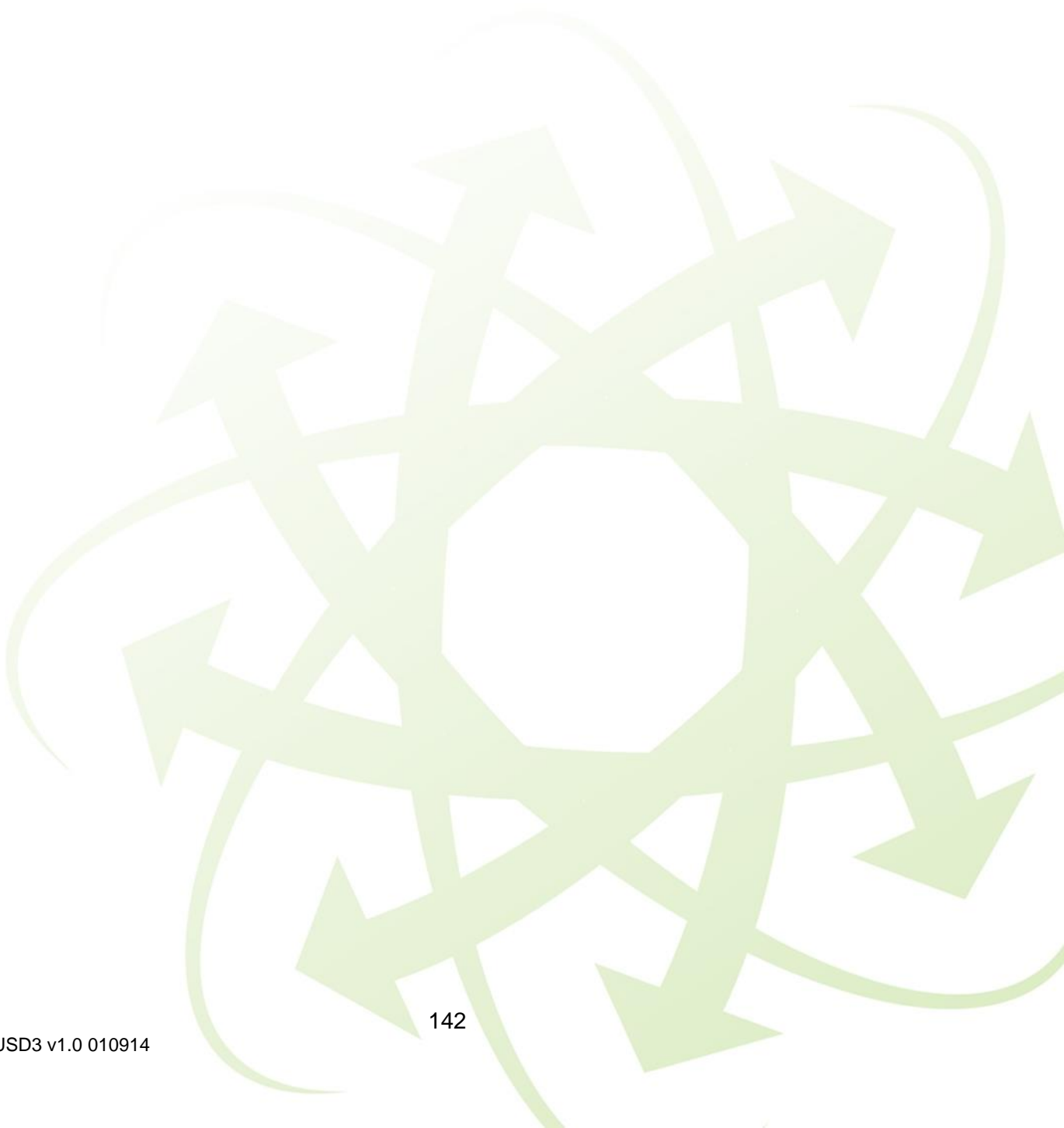
Outcome 3 Be able to present the analysis of business data

The learner can:

- 1 present data in the agreed reporting format and house style
- 2 acknowledge the limitations of the analysis
- 3 reference data sources

BUS66

Support environmental sustainability in a
business environment



BUS66 Support environmental sustainability in a business environment

Level: 4

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the principles supporting environmental sustainability in a business environment and the ability to implement best practice

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand the principles supporting environmental sustainability in a business environment
2. Be able to implement best practice in environmental sustainability in a business environment

Guided learning hours

It is recommended that **38** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS66 Support environmental sustainability in a business environment

Learning outcomes and assessment criteria

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

The learner can:

- 1 describe current legislation in relation to environmental sustainability in a business environment
- 2 explain government incentives that support environmental sustainability in a business environment
- 3 analyse the relationship between environmental sustainability and corporate social responsibility
- 4 explain the health and safety considerations for environmental sustainability and waste management
- 5 explain techniques to evaluate the impact of an organisation's environmental and sustainability policies and procedures

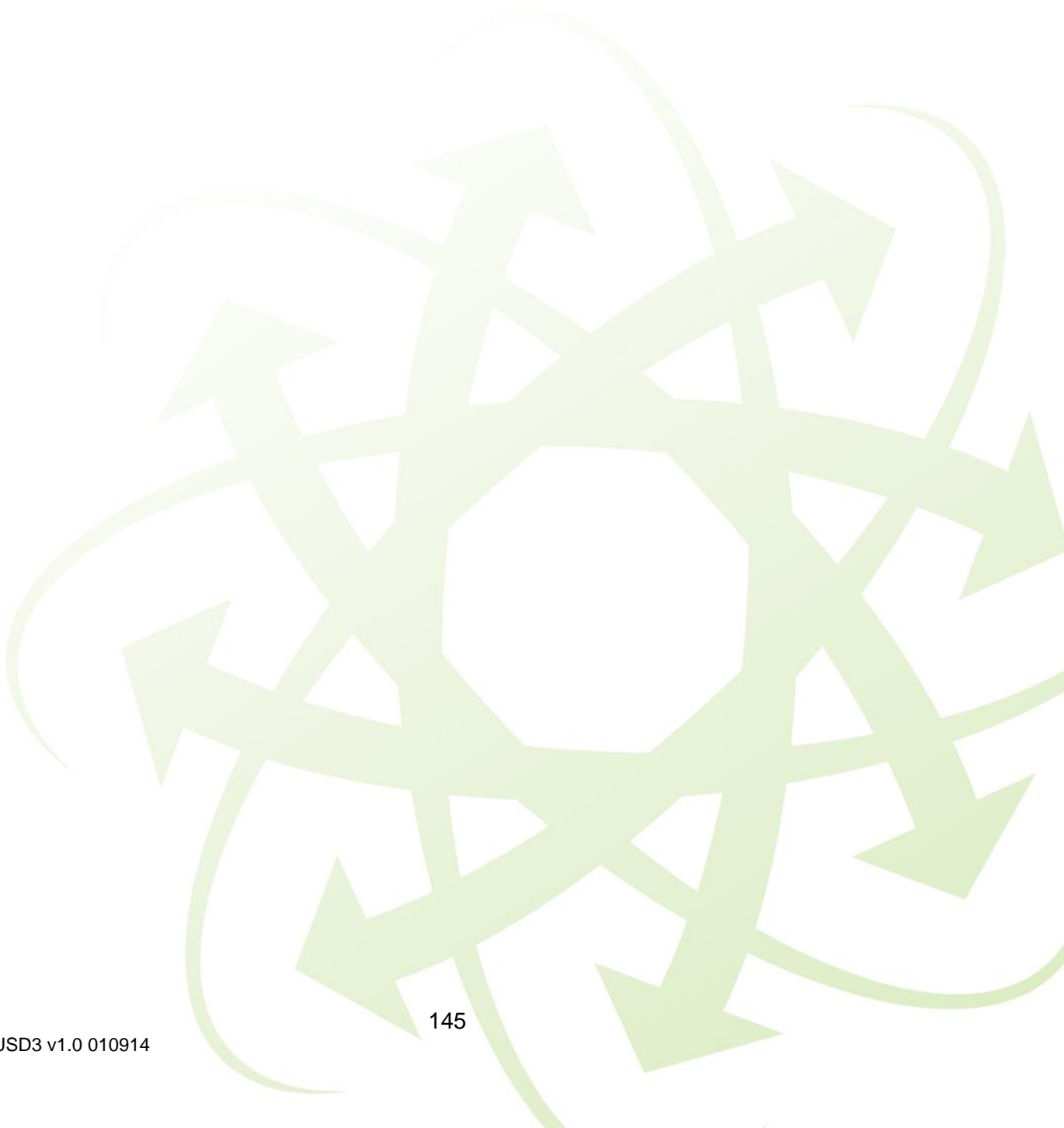
Outcome 2 Be able to implement best practice in environmental sustainability in a business environment

The learner can:

- 1 identify the environmental standards that are relevant to an organisation
- 2 evaluate the impact of an organisation's business on its environment
- 3 promote a culture of efficient consumption of energy in line with an organisation's energy management policies
- 4 establish procedures to minimise waste and maximise the recycling of materials
- 5 establish procedures to meet hazardous waste regulations
- 6 adhere to organisational policies and procedures, legal and ethical requirements when implementing best practice in a business environment

BUS67

Resolve administrative problems



BUS67 Resolve administrative problems

Level: 4

Credit value: 6

Unit aim

The aim of this unit is to provide learners with an understanding of the principles underpinning the resolution of administrative problems. It will also provide them with ability to identify and resolve administrative problems.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the principles underpinning the resolution of administrative problems
2. Be able to identify administrative problems
3. Be able to resolve administrative problems

Guided learning hours

It is recommended that **56** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Administrative functions could include but not be exclusive to:

- Finance
- Organisation
- IT
- Human resources

Risk management techniques are the resources used to minimise, monitor, and control the probability and/or impact of unfortunate events

Analytical techniques could include:

- Defining the problem not just the symptoms
- Considering different perspectives on the problem
- Understanding how the problem interrelates with other people/departments

A **strategy** is the method used to resolve a specific problem

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS67 Resolve administrative problems

Learning outcomes and assessment criteria

Outcome 1 Understand the principles underpinning the resolution of administrative problems

The learner can:

- 1 evaluate the effectiveness of different types of information on an administrative function
- 2 explain the basis for selecting tools, techniques and strategies to analyse administrative functions
- 3 explain the constraints attached to the use of resources needed to resolve administrative problems
- 4 explain how to apply risk assessment and management techniques to identify and resolve administrative problems
- 5 analyse the effectiveness of different techniques used to resolve administrative problems

Outcome 2 Be able to identify administrative problems

The learner can:

- 1 collect information relevant to the administrative problem
- 2 use analytical techniques that are appropriate to the administrative problem
- 3 clarify whether an administrative problem is recurrent, intermittent or a sole instance
- 4 identify patterns of issues and problems
- 5 identify the likely cause of an administrative problem

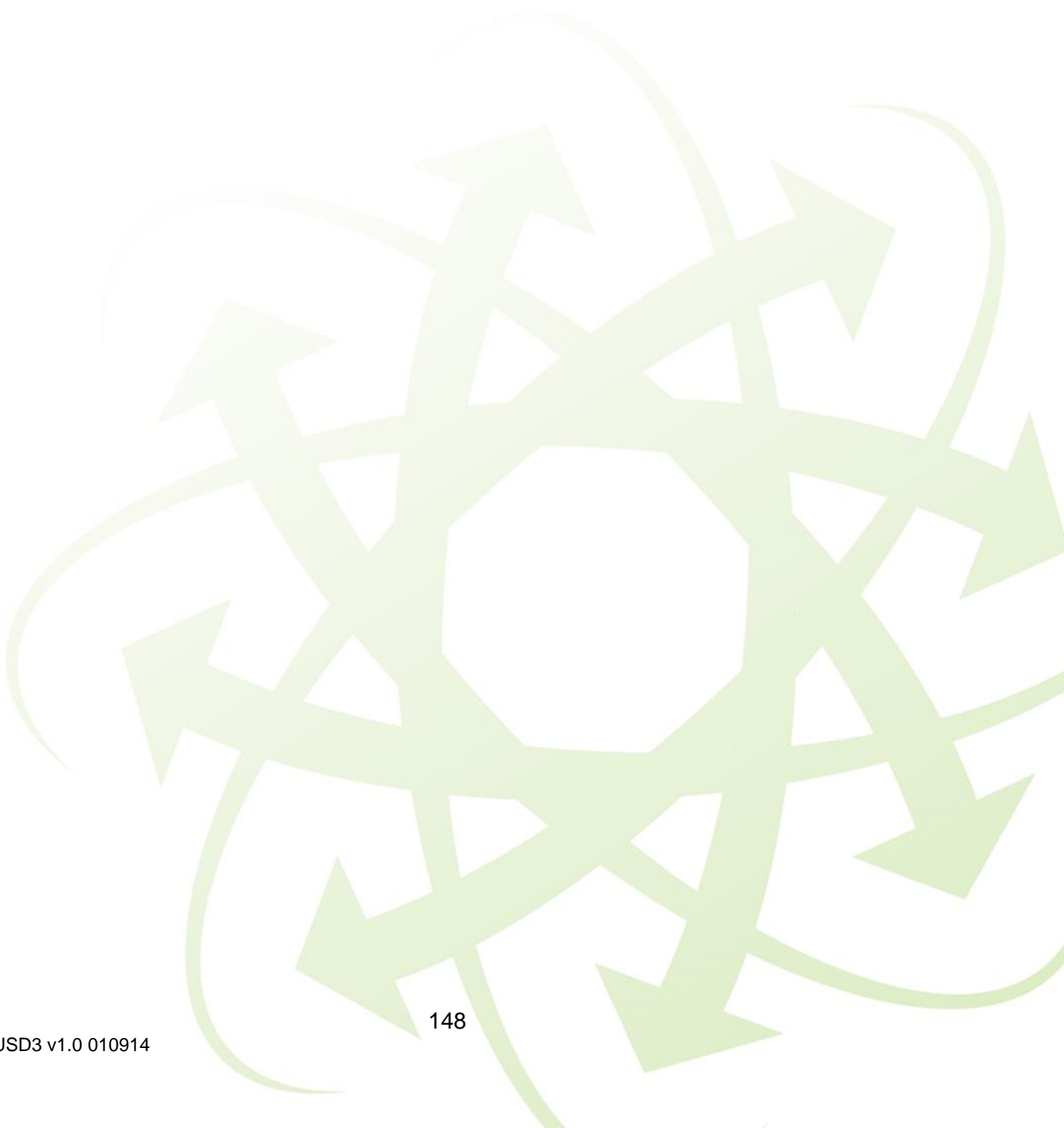
Outcome 3 Be able to resolve administrative problems

The learner can:

- 1 select a strategy that is appropriate for the nature, scale, seriousness and priority of the administrative problem
- 2 develop a plan that addresses the administrative problem whilst minimising disruption to business
- 3 identify success criteria that are capable of measuring the effectiveness of solutions to solve administrative problems
- 4 implement a problem-solving plan within the agreed timescale and constraints
- 5 take action to ensure that systems and processes are capable of preventing future reoccurrences
- 6 evaluate the effectiveness of problem solving activities
- 7 adhere to organisational policies and procedures, legal and ethical requirements when resolving administrative problems

BUS68

Prepare specifications for contracts



BUS68 Prepare specifications for contracts

Level: 4

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the principles supporting the preparation of, and the ability to prepare, specifications for contracts

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand the principles supporting the preparation of specifications for contracts
2. Be able to prepare specifications for contracts

Guided learning hours

It is recommended that **23** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Sufficient information should cover what is required, how many, by when and the available budget

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for business administration.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

BUS68 Prepare specifications for contracts

Learning outcomes and assessment criteria

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

The learner can:

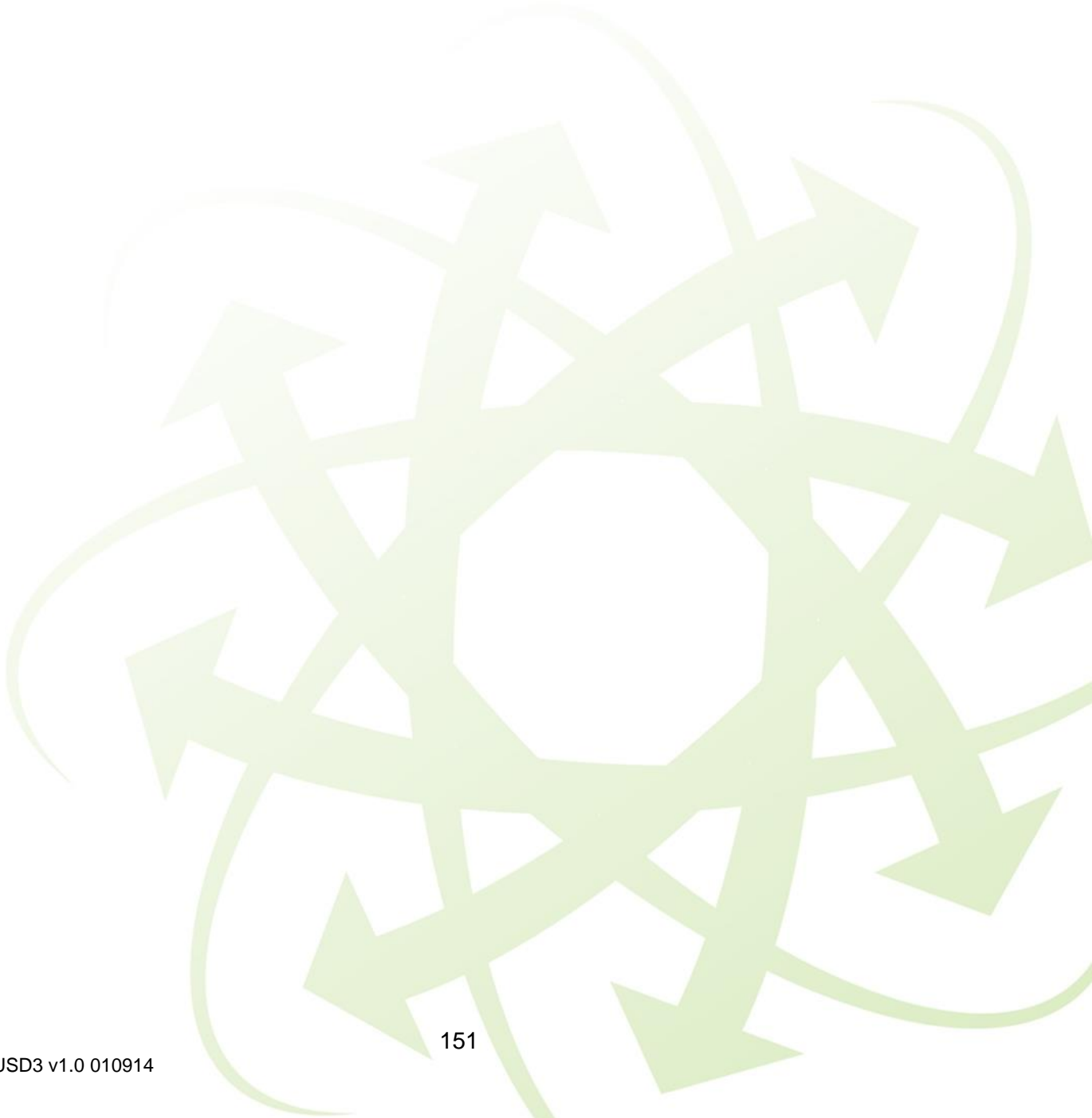
- 1 explain the scope of contract specifications
- 2 explain the roles and interests of those who should be involved in a tender process
- 3 analyse the legal implications of a range of types of contracts and agreements
- 4 explain the requirements of confidentiality and data protection
- 5 evaluate the risks associated with procurement and tendering processes
- 6 explain the basis for the design of a tender evaluation process

Outcome 2 Be able to prepare specifications for contracts

The learner can:

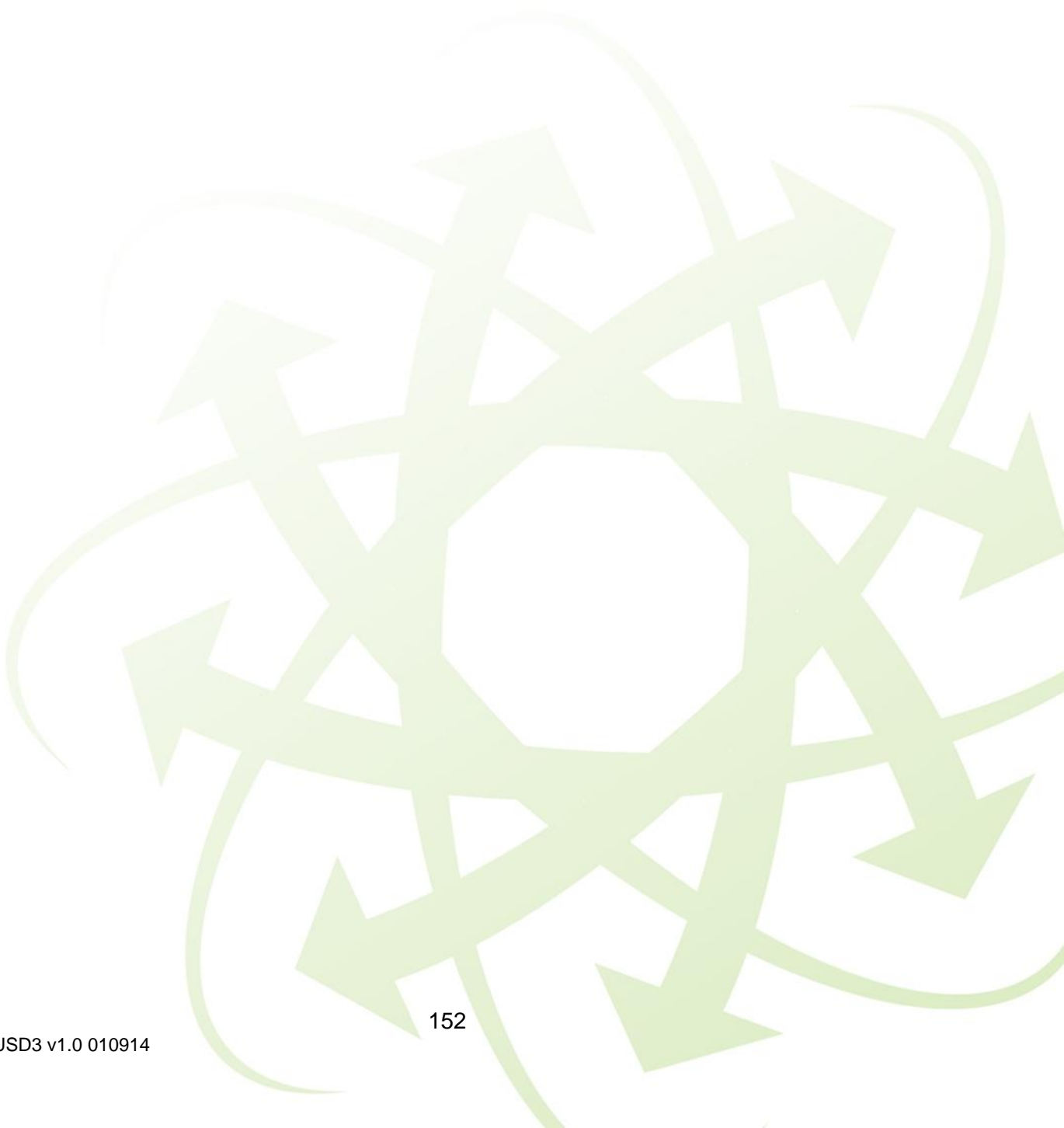
- 1 confirm the requirements for the contract specification
- 2 draft contract specifications that meet the requirements including post-contractual requirements
- 3 specify the parameters of the contract in line with the requirements
- 4 provide sufficient information to enable potential suppliers to develop proposals that are capable of meeting the specification
- 5 define objective selection criteria to evaluate tender proposals
- 6 establish a selection process that meets organisational requirements
- 7 adhere to organisational policies and procedures, legal and ethical requirements when preparing specifications for contracts

7.4 Group B - optional units



CUS25

Organise and deliver customer service



CUS25 Organise and deliver customer service

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of how to organise, and the ability to plan, customer service delivery. It also provides learners with an ability to deliver customer service.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand how to organise customer service delivery
2. Be able to plan the delivery of customer service
3. Be able to deliver customer service

Guided learning hours

It is recommended that **27** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Methods of promoting products and/or services could include but not be exclusive to: advertising, e.g., TV, online, press, flyers, in store messaging, social media campaigns

Segmentation - the technique used to enable a business to better target its products at the right customers

Customer journey e.g. points of transaction, points of contact and response mechanisms for each stage of the journey

Systems and structures – the procedures, people, and resources needed to deliver customer service.

Resources can include but are not exclusive to staff, promotional materials and equipment

Service failure - a dissatisfactory service experience

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

CUS25 Organise and deliver customer service

Learning outcomes and assessment criteria

Outcome 1 Understand how to organise customer service delivery

The learner can:

- 1 explain how different methods of promoting products and/or services impact on customer service delivery
- 2 explain who should be involved in the organisation of customer service delivery
- 3 explain the importance of differentiating between customers' wants, needs and expectations
- 4 explain different ways of segmenting customer groups
- 5 explain how customer segmentation is used in organising customer service delivery
- 6 explain how to analyse the "customer journey"

Outcome 2 Be able to plan the delivery of customer service

The learner can:

- 1 identify customers' needs and expectations
- 2 map the "customer journey"
- 3 confirm that systems and structures are in place to enable the delivery of agreed standards of customer service
- 4 prepare the resources needed to deliver products and/or services to different types of customers
- 5 plan how to deal with unexpected additional workloads
- 6 allocate priorities to address points of service failure

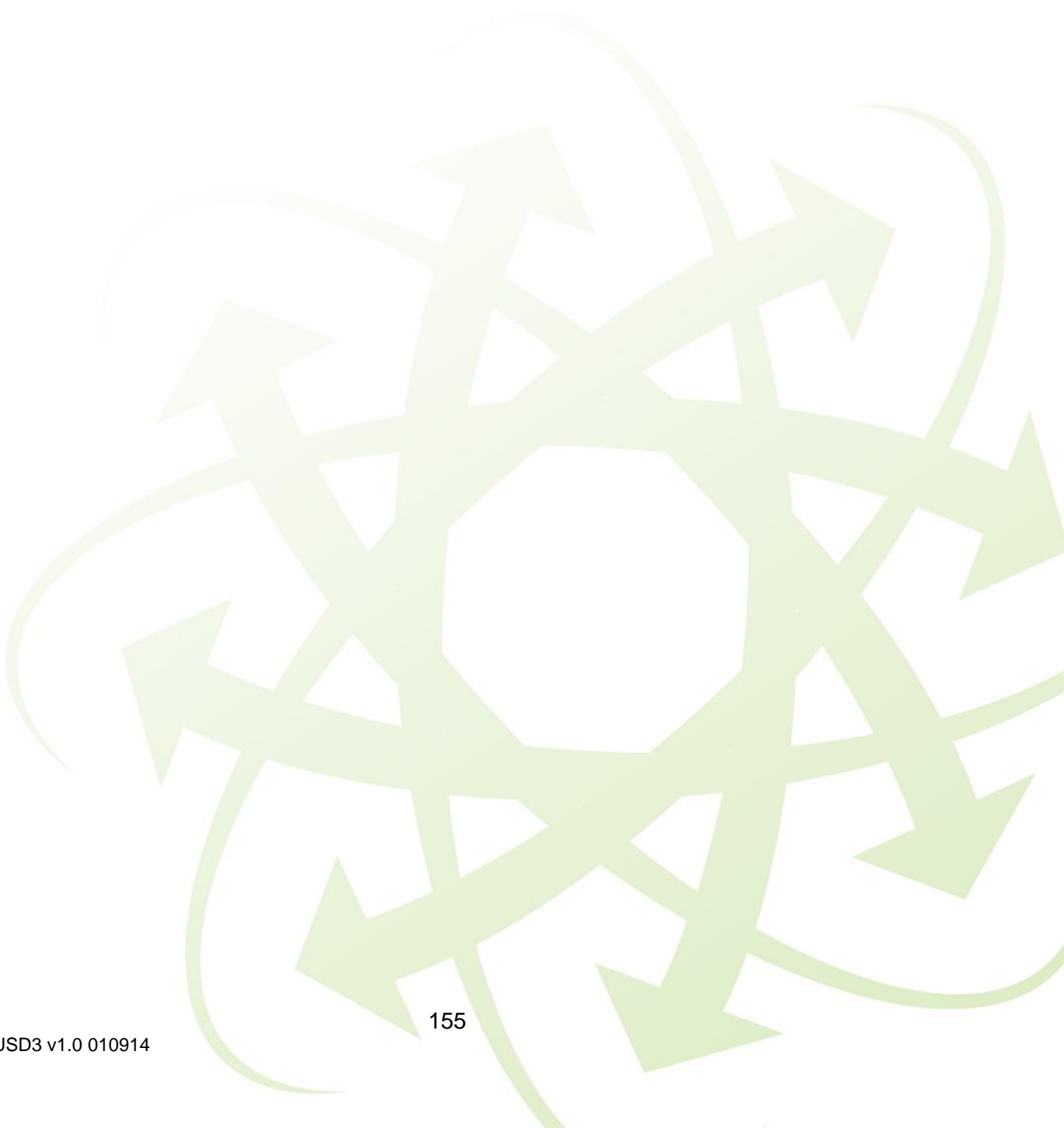
Outcome 3 Be able to deliver customer service

The learner can:

- 1 take steps to ensure that the needs of customers are balanced with organisational objectives
- 2 agree realistic and achievable actions with customers
- 3 identify areas for improvement in their own customer service delivery
- 4 adapt their own customer service delivery to meet customers' changing expectations

CUS31

Resolve customers' complaints



CUS31 **Resolve customers' complaints**

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the monitoring and resolution of, and the ability to deal with, customers' complaints

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand the monitoring and resolution of customers' complaints
2. Be able to deal with customers' complaints

Guided learning hours

It is recommended that **22** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Monitoring techniques may include, but are not limited to:

- Record keeping
- Customer contact systems
- E-mails
- Letters
- Task-specific documents

Negotiating techniques may include, but are not limited to:

- Compensation
- Replacement
- Cost reduction
- Upgrade
- Standard communication
- Referral to specialist team

Conflict management techniques may include, but are not limited to:

- Standard communication
- Referral to specialist team
- Explanation at source
- 'Second facing' at source

Organisational procedures may include, but are not limited to:

- Explanation at source
- 'Second facing' at source
- Compensation
- Replacement
- Cost reduction
- Upgrade
- Standard communication
- Referral to specialist team

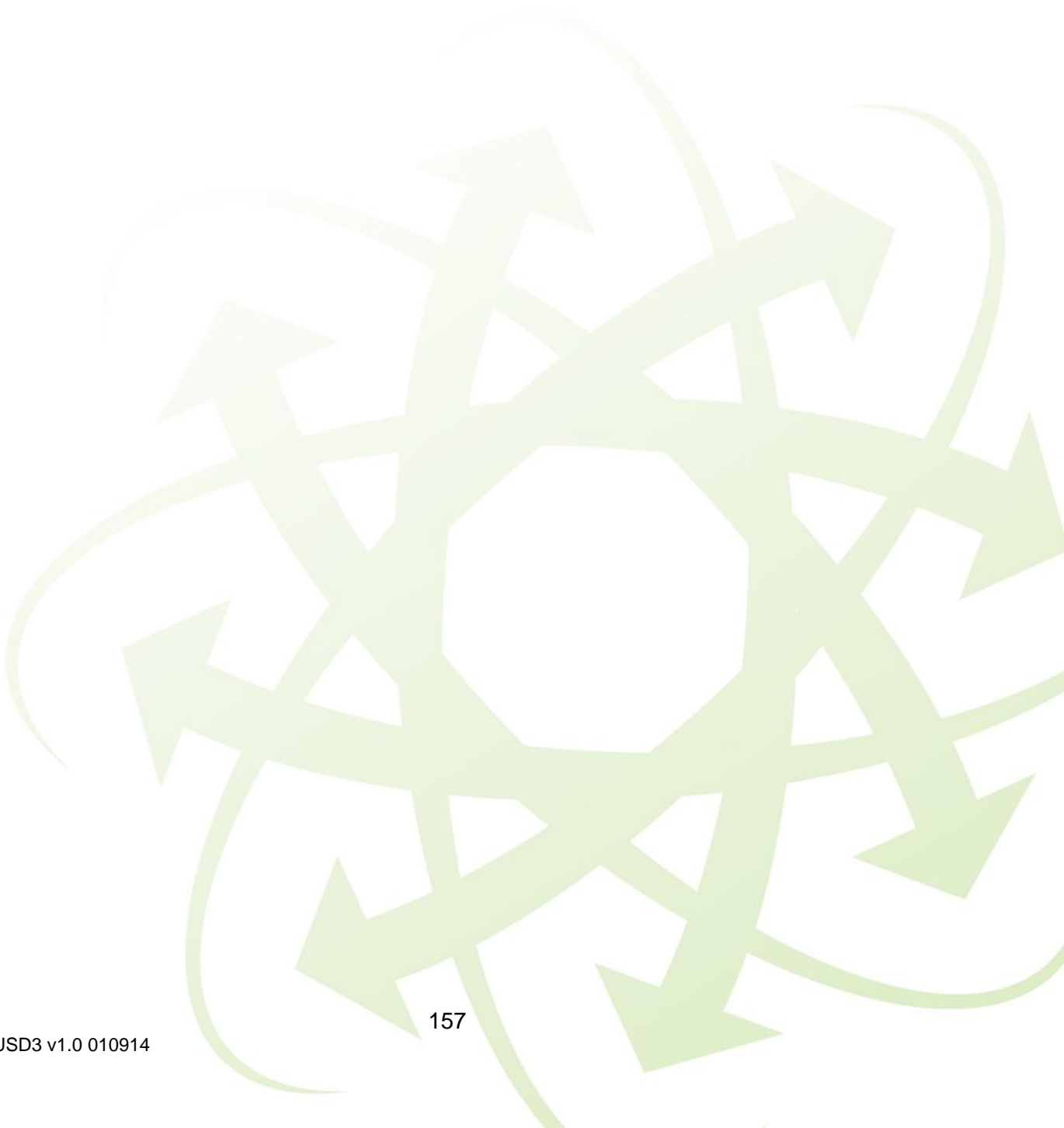
Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.



CUS31 Resolve customers' complaints

Learning outcomes and assessment criteria

Outcome 1 Understand the monitoring and resolution of customers' complaints

The learner can:

- 1 assess the suitability of a range of monitoring techniques for customers' complaints
- 2 explain how to identify those complaints that should prompt a review of the service offer and service delivery
- 3 explain negotiating techniques used to resolve customers' complaints
- 4 explain conflict management techniques used in dealing with upset customers
- 5 explain organisational procedures for dealing with customer complaints
- 6 explain when to escalate customers' complaints
- 7 explain the cost and regulatory implications of admitting liability on the basis of a customer complaint
- 8 explain the advantages and limitations of offering compensation or replacement products and/or services

Outcome 2 Be able to deal with customers' complaints

The learner can:

- 1 confirm the nature, cause and implications of customers' complaints
- 2 take personal responsibility for dealing with complaints
- 3 communicate in a way that recognises customers' problems and understands their points of view
- 4 explain the advantages and limitations of different complaint response options to customers
- 5 explain the advantages and limitations of different complaint response options to the organisation
- 6 keep customers informed of progress
- 7 agree solutions with customers that address the complaint and which are within the limits of their own authority
- 8 record the outcome of the handling of complaints for future reference
- 9 adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints

IT301

Bespoke software



IT301 **Bespoke Software**

Level: 3

Credit value: 4

Unit aims

This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively. On completion of this unit a candidate should be able to select and use a range of advanced bespoke software tools and techniques for complex or non-routine information. Bespoke software tools and techniques will be defined as 'advanced' because:

- the software tools and functions used will be complex, and at times involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying;
- the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application; and
- the user will take full responsibility for inputting, manipulating and outputting the information

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Input and combine information using bespoke software
2. Create and modify appropriate structures to organise and retrieve information efficiently
3. Exploit the functions of the software effectively to process and present information

Guided learning hours

It is recommended that **30** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT301 Bespoke Software

Learning outcomes and assessment criteria

Outcome 1 Input and combine information using bespoke software

The learner can:

- 1 input relevant information accurately so that it is ready for processing
- 2 select and use appropriate techniques to link and combine information within the application and across different software applications

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

The learner can:

- 1 evaluate the use of software functions to structure, layout and style information
- 2 create, change and use appropriate structures and/or layouts to organise information efficiently
- 3 manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available

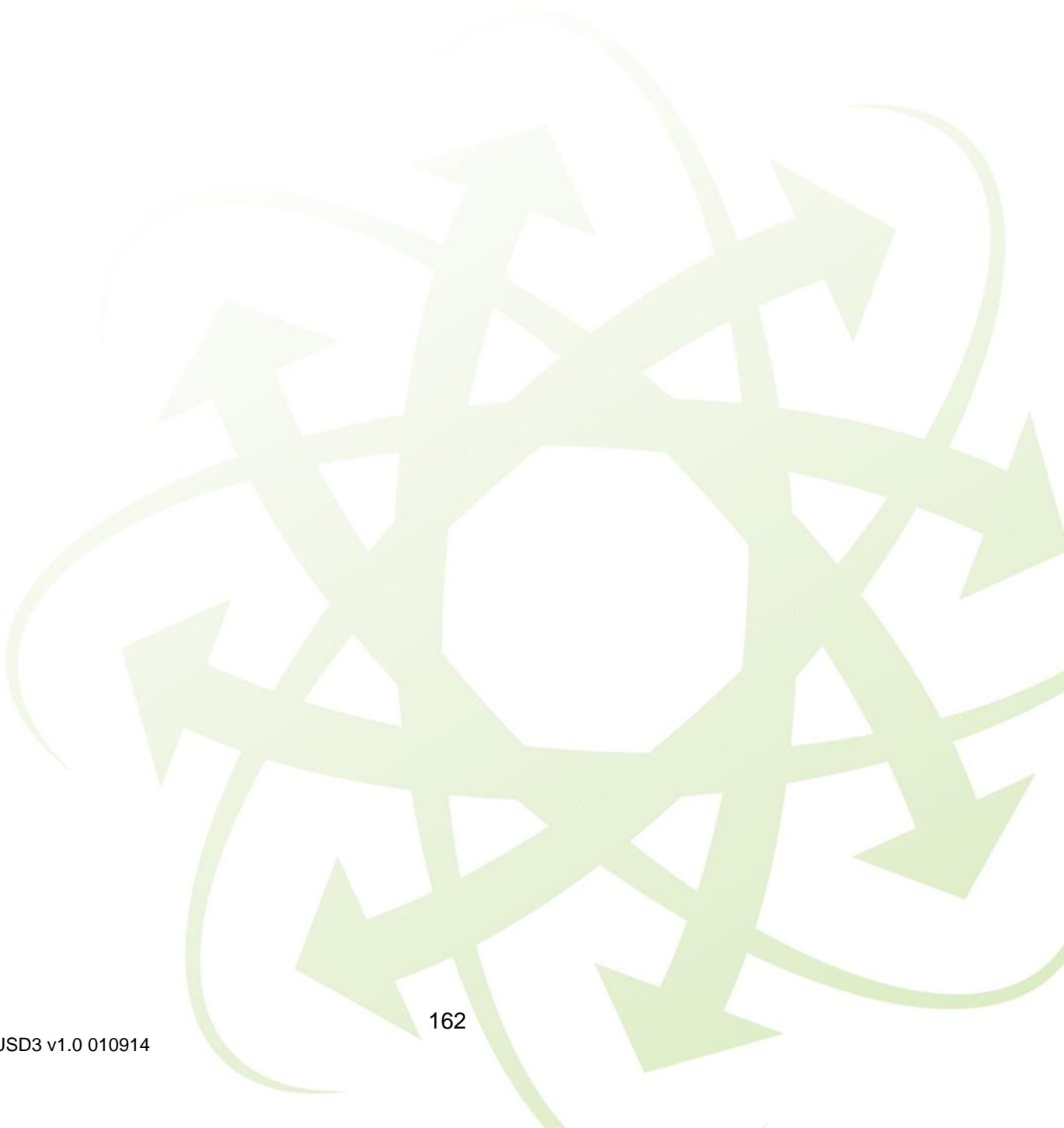
Outcome 3 Exploit the functions of the software effectively to process and present information

The learner can:

- 1 select and use appropriate tools and techniques to edit, analyse and format information
- 2 check information meets needs, using IT tools and making corrections as necessary
- 3 identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs
- 4 select and use presentation methods to aid clarity and meaning

IT303

Database software



Level: 3

Credit value: 6

Unit aims

This is the ability to use a software application designed to organise and store structured information and generate reports. On completion of this unit a candidate should be able to select and use advanced database software tools and techniques efficiently to:

- enter complex information into databases;
- retrieve information by creating queries using multiple selection criteria; and
- produce reports by setting up menus or short cuts

They will also be able to design, create and interrogate multiple-table relational databases. Database tools, functions and techniques will be described as 'advanced' because:

- the software tools and functions involved will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying and;
- the input, manipulation and output techniques involved will be complex, which will involve research, identification and application.

Examples of context: Typical 'more complex' reports from multiple-table relational databases may be about – customers' buying methods, order frequency and payment patterns.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Plan, create and modify relational database tables to meet requirements
2. Enter, edit and organise structured information in a database
3. Use database software tools to create, edit and run data queries and produce reports

Guided learning hours

It is recommended that **45** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT303 Database Software

Learning outcomes and assessment criteria

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

The learner can:

- 1 explain how a relational database design enables data to be organised and queried
- 2 plan and create multiple tables for data entry with appropriate fields and properties
- 3 set up and modify relationships between database tables
- 4 explain why and how to maintain data integrity
- 5 respond appropriately to problems with database tables
- 6 use database tools and techniques to ensure data integrity is maintained

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

The learner can:

- 1 design and create forms to access, enter, edit and organise data in a database
- 2 select and use appropriate tools and techniques to format data entry forms
- 3 check data entry meets needs, using IT tools and making corrections as necessary
- 4 respond appropriately to data entry errors

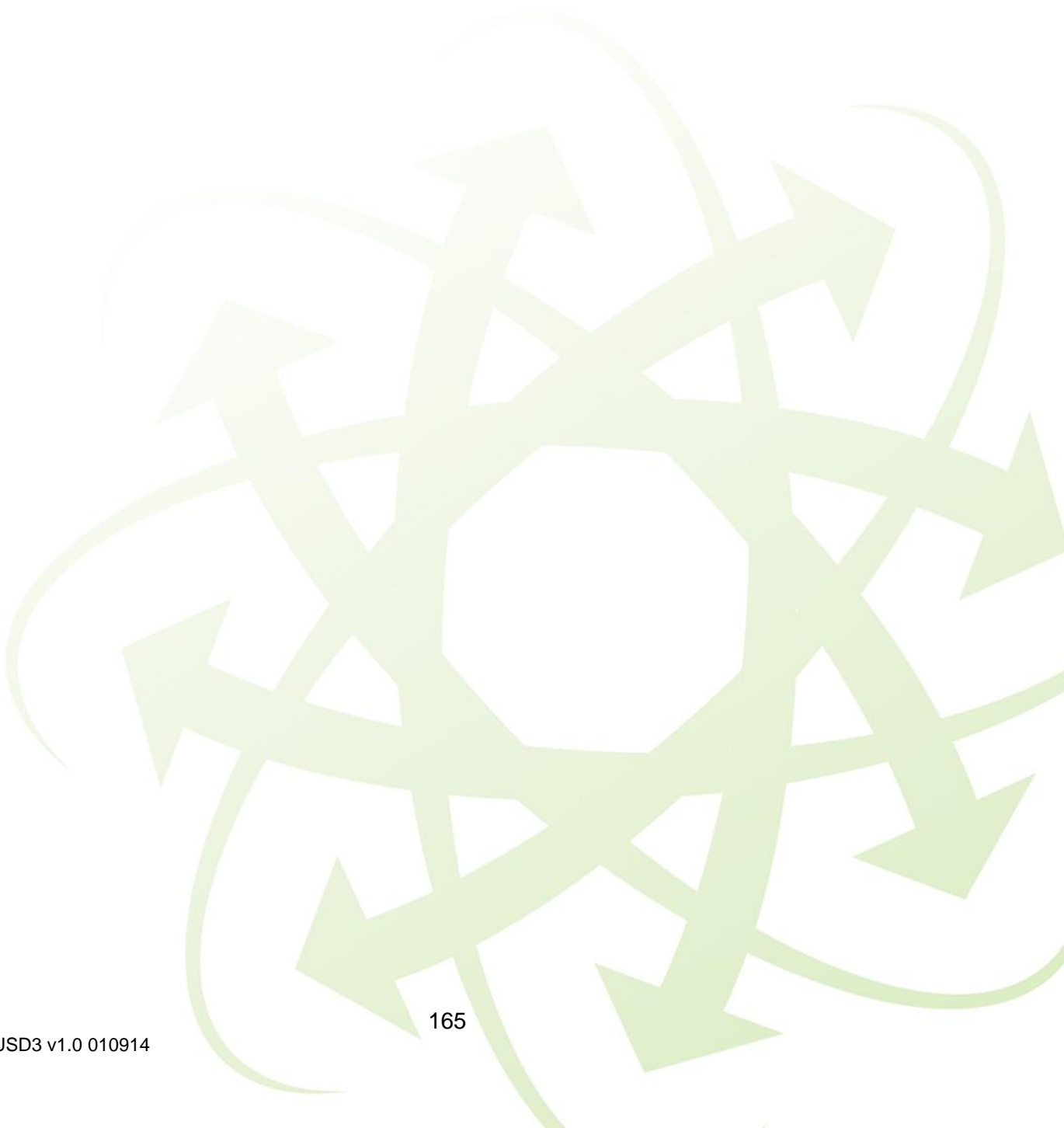
Outcome 3 Use database software tools to create, edit and run data queries and produce reports

The learner can:

- 1 explain how to select, generate and output information from queries according to requirements
- 2 create and run database queries to display, amend or calculate selected data
- 3 plan and produce database reports from a multiple-table relational database
- 4 select and use appropriate tools and techniques to format database reports
- 5 check reports meet needs, using IT tools and making corrections as necessary

IT306

Presentation software



IT306 Presentation software

Level: 3

Credit value: 6

Unit aims

This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing. On completion of this unit a candidate should be able to select and use a wide range of advanced presentation software tools and techniques effectively to produce presentations that are complex or non-routine.

Presentation tools and techniques will be described as 'advanced' because:

- the software tools and functions used will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying;
- the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application; and
- the user will take full responsibility for inputting, structuring, editing and presenting the information.

Examples of context: An interactive or multi-media presentation.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Input and combine text and other information within presentation slides
2. Use presentation software tools to structure, edit and format presentations
3. Prepare interactive slideshow for presentation

Guided learning hours

It is recommended that 45 hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT306 Presentation software

Learning outcomes and assessment criteria

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

The learner can:

- 1 explain what types of information are required for the presentation
- 2 enter text and other information using layouts appropriate to type of information
- 3 insert charts and tables and link to source data
- 4 insert images, video or sound to enhance the presentation
- 5 identify any constraints which may affect the presentation
- 6 organise and combine information for presentations in line with any constraints
- 7 store and retrieve presentation files effectively, in line with local guidelines and conventions where available

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

The learner can:

- 1 explain when and how to use and change slide structure and themes to enhance presentations
- 2 create, amend and use appropriate templates and themes for slides
- 3 explain how interactive and presentation effects can be used to aid meaning or impact
- 4 select and use appropriate techniques to edit and format presentations to meet needs
- 5 create and use interactive elements to enhance presentations
- 6 select and use animation and transition techniques appropriately to enhance presentations

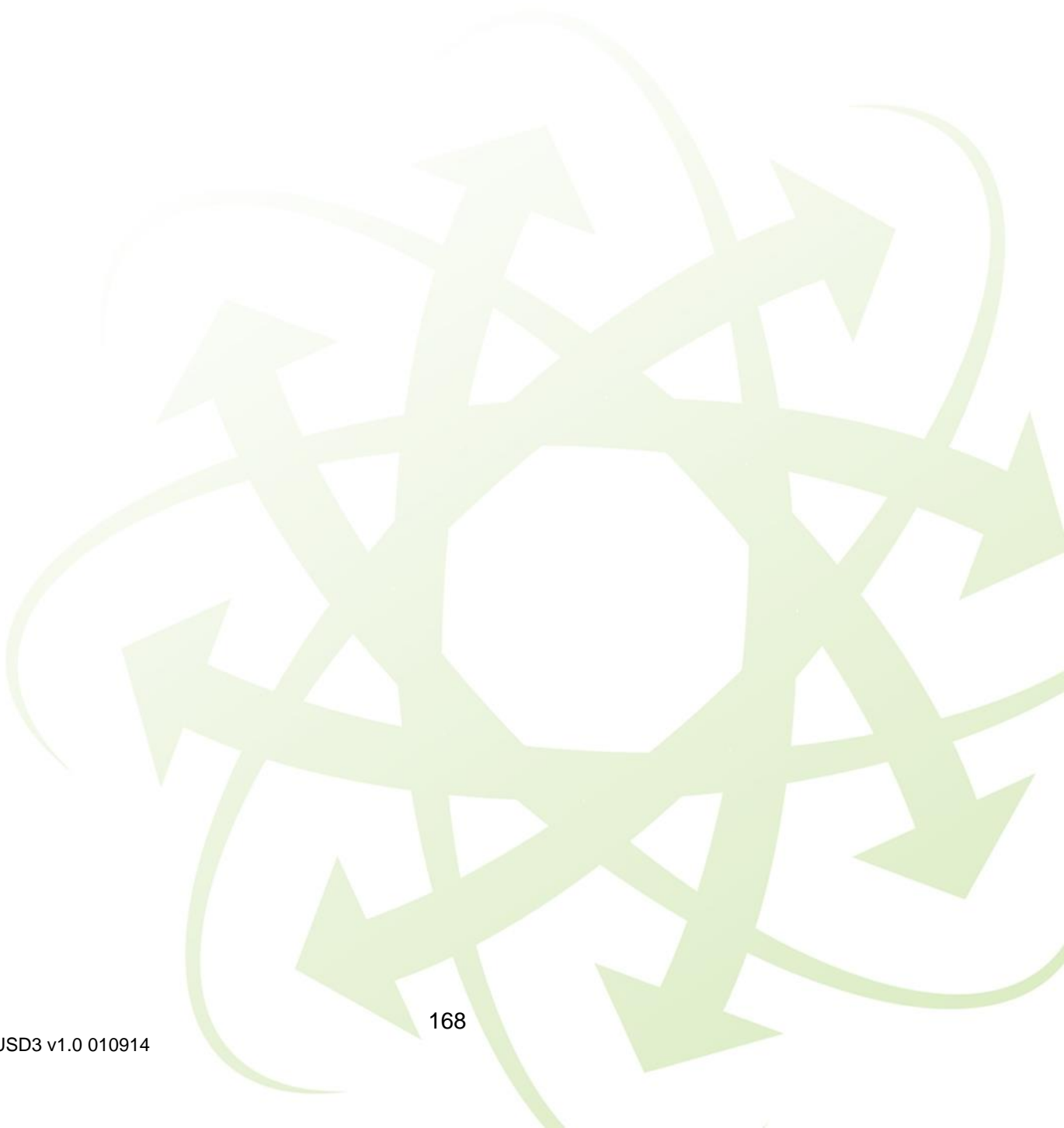
Outcome 3 Prepare interactive slideshow for presentation

The learner can:

- 1 explain how to present slides to communicate effectively for different contexts
- 2 prepare interactive slideshow and associated products for presentation
- 3 check presentation meets needs, using IT tools and making corrections as necessary
- 4 evaluate presentations, identify any quality problems and discuss how to respond to them
- 5 respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose

IT308

Spreadsheet software



IT308 Spreadsheet software

Level: 3

Credit value: 6

Unit aims

This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs. On completion of this unit a candidate should be able to select and use a wide range of advanced spreadsheet software tools and techniques to produce, present and check complex and non-routine spreadsheets. Spreadsheet software tools and techniques will be defined as 'advanced' because:

- the range of data entry, manipulation and outputting techniques will be complex and non-routine;
- the tools, formulas and functions needed to analyse and interpret the required information require complex and non-routine knowledge and understanding (for example, data restrictions, data validation using formula, pivot tables, data maps); and
- the user will take full responsibility for setting up and developing the functionality of the spreadsheet.

Examples of context: Typical examples may include - cost benefit analysis, analysis of results from a questionnaire or survey, developing summary reports from a large data set, creating a personalised customer quotation from a standard price list.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will be able to:

1. Use a spreadsheet to enter, edit and organise numerical and other data
2. Select and use appropriate formulas and data analysis tools and techniques to meet requirements
3. use tools and techniques to present, and format and publish spreadsheet information

Guided learning hours

It is recommended that **45** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT308 Spreadsheet software

Learning outcomes and assessment criteria

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

The learner can:

- 1 identify what numerical and other information is needed in the spreadsheet and how it should be structured
- 2 enter and edit numerical and other data accurately
- 3 combine and link data from different sources
- 4 store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available

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

The learner can:

- 1 explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them
- 2 select and use a wide range of appropriate functions and formulas to meet calculation requirements
- 3 select and use a range of tools and techniques to analyse and interpret data to meet requirements
- 4 select and use forecasting tools and techniques

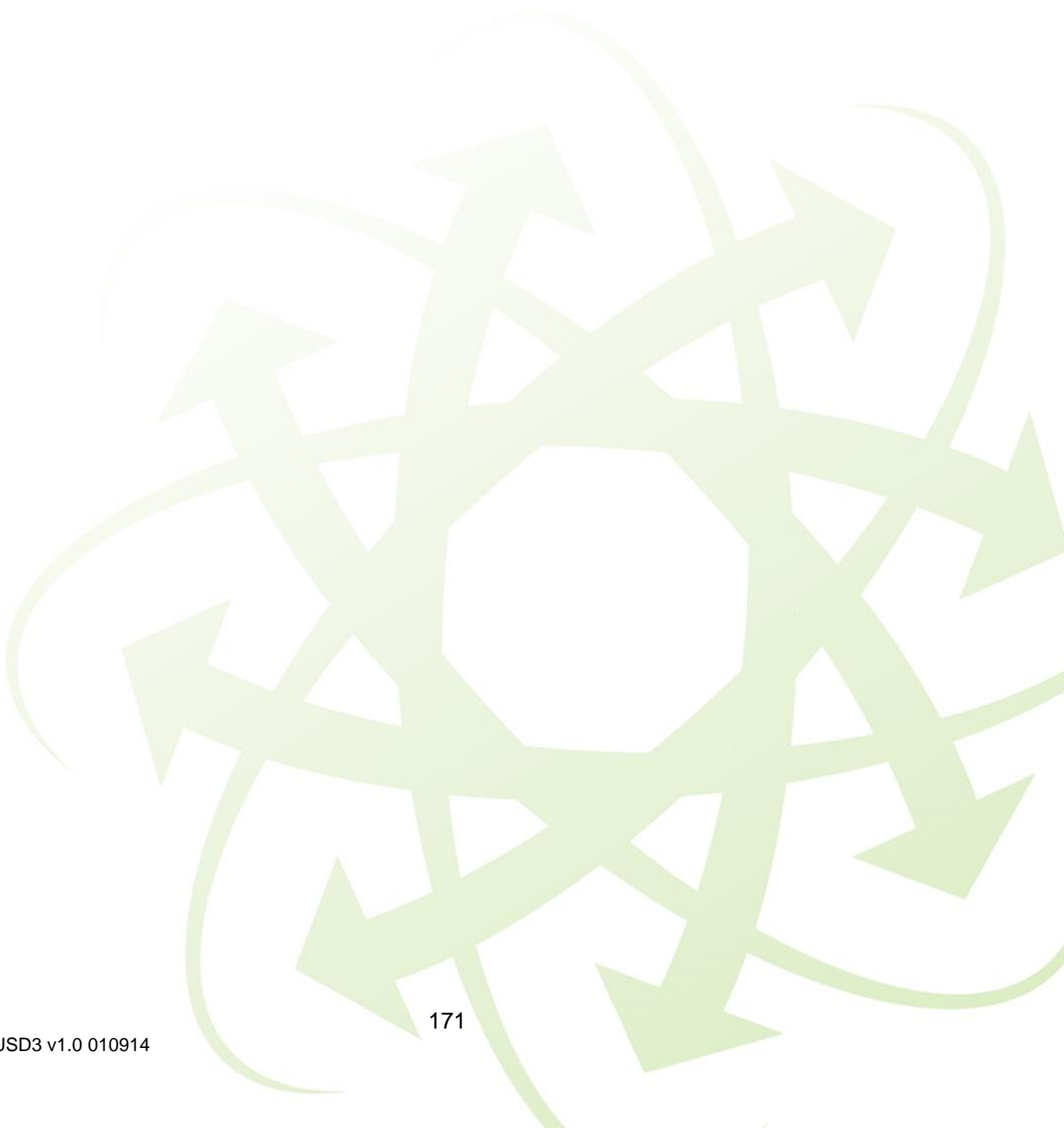
Outcome 3 Use tools and techniques to present, and format and publish spreadsheet information

The learner can:

- 1 explain how to present and format spreadsheet information effectively to meet needs
- 2 select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively
- 3 select and use appropriate tools and techniques to generate, develop and format charts and graphs
- 4 select and use appropriate page layout to present, print and publish spreadsheet information
- 5 explain how to find and sort out any errors in formulas
- 6 check spreadsheet information meets needs, using IT tools and making corrections as necessary
- 7 use auditing tools to identify and respond appropriately to any problems with spreadsheets

IT310

Website software



IT310 Website software

Level: 3

Credit value: 5

Unit aims

This is the ability to use a software application designed for planning, designing and building websites. On completion of this unit a candidate should be able to select and use a range of advanced website software tools and techniques to develop multiple-page websites with multimedia and interactive features. Website software tools and techniques will be defined as 'advanced' because:

- the software tools and functions used will be complex and at times involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying;
- the development techniques will be complex, and will involve research, identification and application; and
- the user will take full responsibility for planning and developing the structure, inputting, manipulating, adding multimedia or interactive features, uploading and publishing the information.

Examples of context: Shopping website linked to product information and stock control database

Learning outcomes

There are 3 learning outcomes to this unit. The learner will be able to:

1. Create structures and styles and use them to produce websites
2. Select and use website software tools and features to develop multiple page websites with multimedia and interactive features
3. Publish and test multiple page websites with multimedia and interactive features

Guided learning hours

It is recommended that 40 hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT310 Website software

Learning outcomes and assessment criteria

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

The learner can:

- 1 determine what website content and layout will be needed for each page and for the site
- 2 plan and create web page templates to layout content
- 3 select and use website features and structures to enhance website navigation and functionality
- 4 create, select and use styles to enhance website consistency and readability
- 5 provide guidance on laws, guidelines and constraints that affect the content and use of websites
- 6 explain what access issues may need to be taken into account
- 7 explain when and why to use different file types for saving content
- 8 store and retrieve files effectively, in line with local guidelines and conventions where available

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

The learner can:

- 1 prepare content for web pages so that it is ready for editing and formatting
- 2 organise and combine information needed for web pages in line with any copyright constraints, including across different software
- 3 select and use appropriate editing and formatting techniques to aid meaning
- 4 select and use appropriate programming and development techniques to add features and enhance websites
- 5 select and use file formats that make information easier to download
- 6 check web pages meet needs, using IT tools and making corrections as necessary

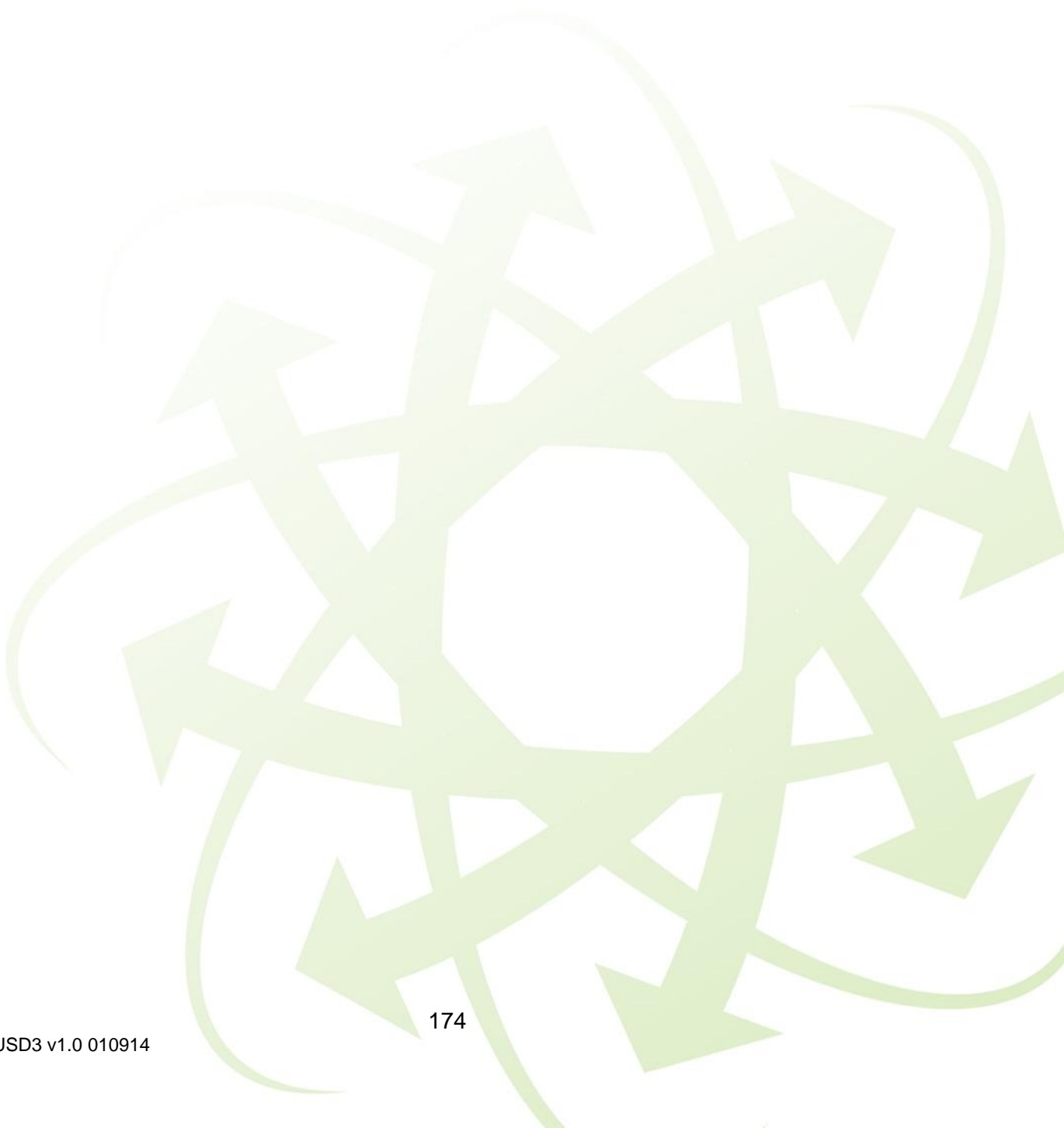
Outcome 3 Publish and test multiple page websites with multimedia and interactive features

The learner can:

- 1 select and use appropriate testing methods to check that all elements and features of complex websites are working as planned
- 2 identify any quality problems with websites and explain how to respond to them
- 3 select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently
- 4 respond appropriately to quality problems with websites to ensure outcomes are fit for purpose

IT311

Word processing software



IT311 Word processing software

Level: 3

Credit value: 6

Unit aims

This is the ability to use a software application designed for the creation, editing and production of largely text-based documents. On completion of this unit a candidate should be able to select and use a range of advanced word processing software tools and techniques to produce complex and non-routine documents. Word processing tools and techniques will be described as 'advanced' because:

- the software tools and functions will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying;
- the techniques required will be complex, and the process of selecting appropriate techniques may involve research, identification and application; and
- the user will take full responsibility for the inputting, manipulating and outputting of the information.

Examples of context: Typical documents will require problem solving and creative thinking and may include – complex reports and content for publications such as web pages, journals, newsletters or other printed materials.

Learning outcomes

There are 3 learning outcomes to this unit. The learner will be able to:

1. Enter and combine text and other information accurately within word processing documents
2. Create and modify appropriate layouts, structures and styles for word processing documents
3. Use word processing software tools and techniques to format and present documents effectively to meet requirements

Guided learning hours

It is recommended that 45 hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT311 Word processing software

Learning outcomes and assessment criteria

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

The learner can:

- 1 summarise what types of information are needed for the document and how they should be linked or integrated
- 2 use appropriate techniques to enter text and other types of information accurately and efficiently
- 3 create, use and modify appropriate templates for different types of documents
- 4 explain how to combine and merge information from other software or multiple documents
- 5 combine and merge information within a document from a range of sources
- 6 store and retrieve document and associated files effectively, in line with local guidelines and conventions where available
- 7 select and use tools and techniques to work with multiple documents or users
- 8 customise interface to meet needs

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

The learner can:

- 1 analyse and explain the requirements for structure and style
- 2 create, use and modify columns, tables and forms to organise information
- 3 define and modify styles for document elements
- 4 select and use tools and techniques to organise and structure long documents

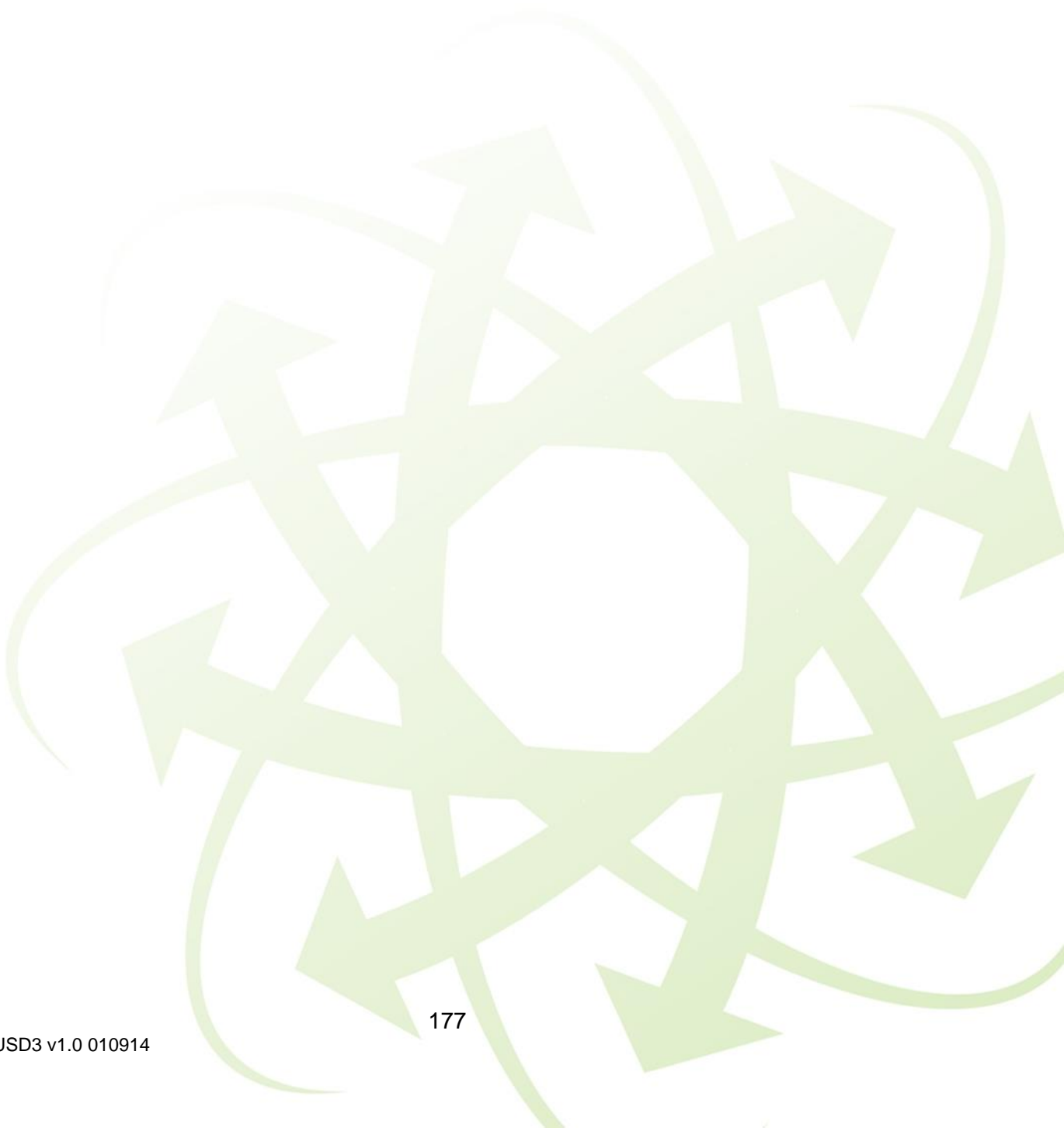
Outcome 3 Use word processing software tools and techniques to format and present documents effectively to meet requirements

The learner can:

- 1 explain how the information should be formatted to aid meaning
- 2 select and use appropriate techniques to format characters and paragraphs
- 3 select and use appropriate page and section layouts to present and print multi-page and multi-section documents
- 4 check documents, meet needs, using IT tools and making corrections as necessary
- 5 evaluate the quality of the documents produced to ensure they are fit for purpose
- 6 respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose

IT312

Using email



IT312 Using email

Level: 3

Credit value: 6

Unit aims

This is the ability to make the best use of e-mail software to safely and securely send, receive and store messages. This unit is about the skills and knowledge to make effective use of a range of e-mail software tools to send, receive and store messages for, at times, non-routine or unfamiliar activities.

Learning outcomes

There are **two** learning outcomes to this unit. The learner will be able to:

1. Use e-mail software tools and techniques to compose and send messages
2. Manage use of e-mail software effectively

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 the National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

IT312 Using email

Learning outcomes and assessment criteria

Outcome 1 Use e-mail software tools and techniques to compose and send messages

The learner can:

- 1 select and use software tools to compose and format e-mail messages, including attachments
- 2 explain methods to improve message transmission
- 3 send e-mail messages to individuals and groups
- 4 explain why and how to stay safe and respect others when using e-mail
- 5 use an address book to manage contact information

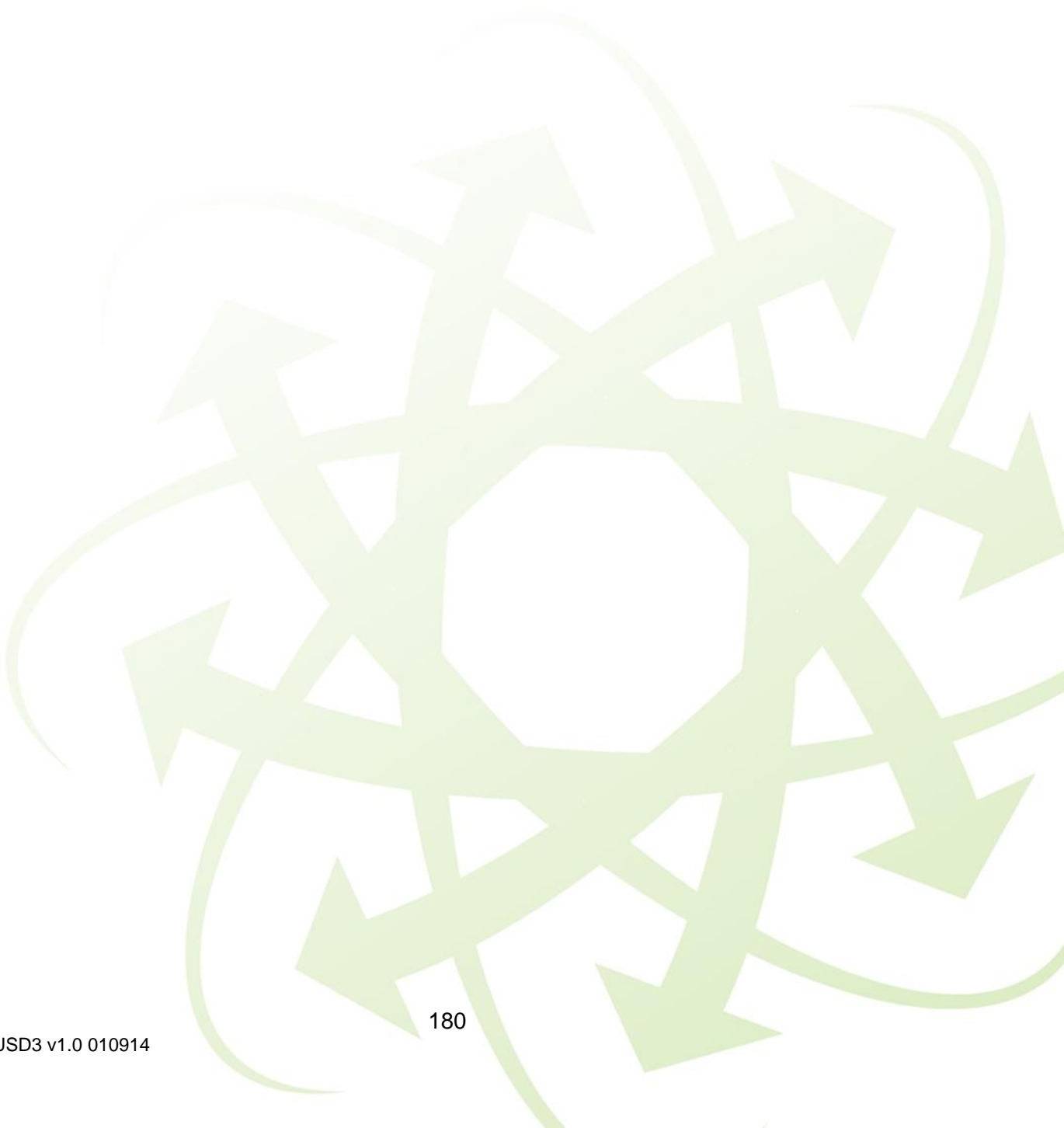
Outcome 2 Manage use of e-mail software effectively

The learner can:

- 1 develop and communicate guidelines and procedures for using e-mail effectively
- 2 read and respond appropriately to e-mail messages and attachments
- 3 use email software tools and techniques to automate responses
- 4 explain why, how and when to archive messages
- 5 organise, store and archive e-mail messages effectively
- 6 customise e-mail software to make it easier to use
- 7 explain how to minimise e-mail problems
- 8 respond appropriately to email problems

ML10

**Promote equality, diversity and inclusion
in the workplace**



ML10 Promote equality, diversity and inclusion in the workplace

Level: 3

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of the organisational and personal aspects of equality, diversity and inclusion in the workplace. It also provides learners with an ability to support equality, diversity and inclusion in the workplace

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the organisational aspects of equality, diversity and inclusion in the workplace
2. Understand the personal aspects of equality, diversity and inclusion in the workplace
3. Be able to support equality, diversity and inclusion in the workplace

Guided learning hours

It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML10 Promote equality, diversity and inclusion in the workplace

Learning outcomes and assessment criteria

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

The learner can:

- 1 explain the difference between equality, diversity and inclusion
- 2 explain the impact of equality, diversity and inclusion across aspects of organisational policy
- 3 explain the potential consequences of breaches of equality legislation
- 4 describe nominated responsibilities within an organisation for equality, diversity and inclusion

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

The learner can:

- 1 explain the different forms of discrimination and harassment
- 2 describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace
- 3 explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace

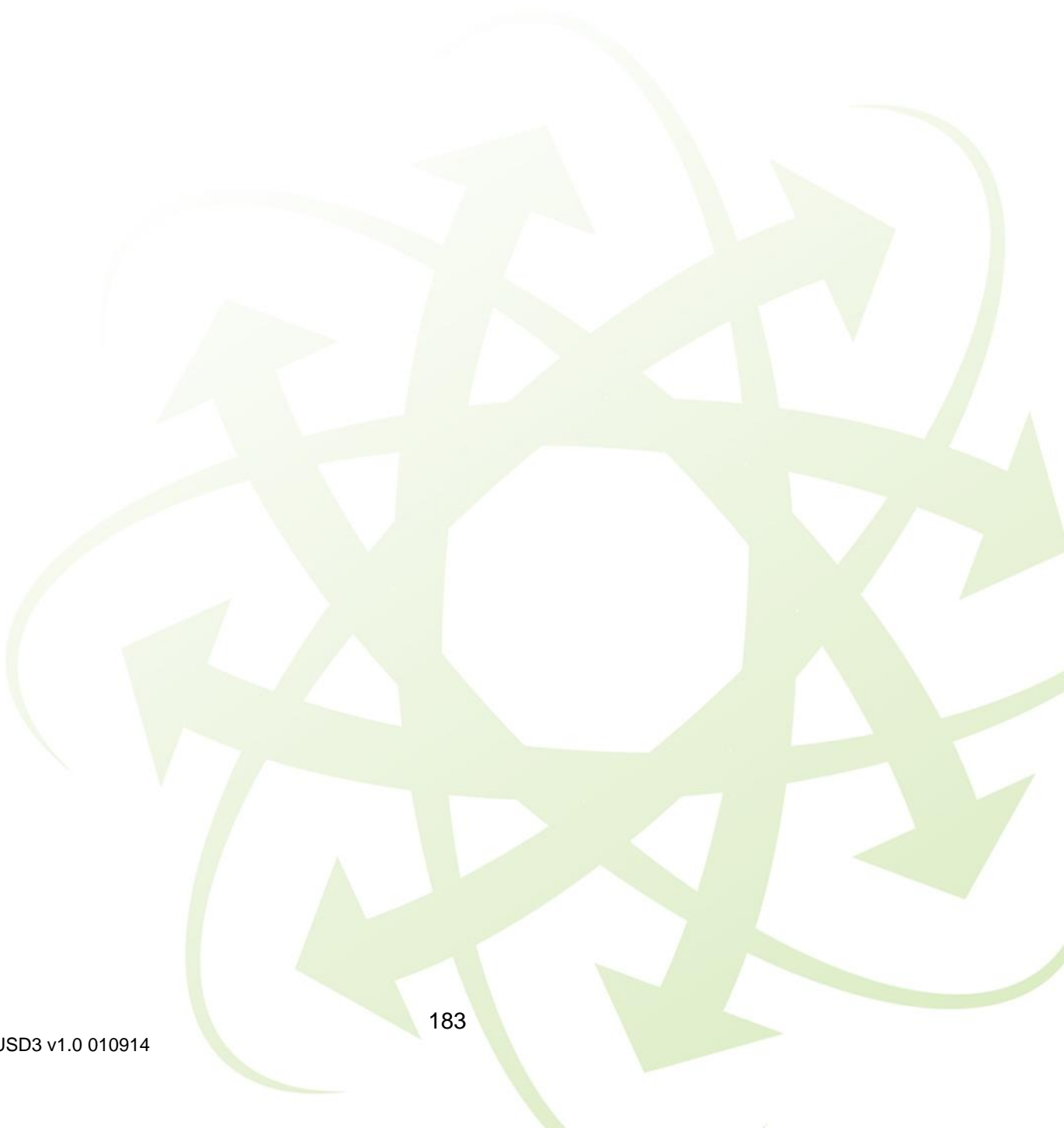
Outcome 3 Be able to support equality, diversity and inclusion in the workplace

The learner can:

- 1 ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace
- 2 identify potential issues relating to equality, diversity and inclusion in the workplace
- 3 adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace

ML11

Manage team performance



ML11 Manage team performance

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the management of team performance. It also provides learners with the ability to allocate and assure the quality of work and to manage communications within a team.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the management of team performance
2. Be able to allocate and assure the quality of work
3. Be able to manage communications within a team

Guided learning hours

It is recommended that **21** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

A **benchmark** is a standard or measurement that could include:

- Key performance indicators (KPIs)
- Best operational practices

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML11 Manage team performance

Learning outcomes and assessment criteria

Outcome 1 Understand the management of team performance

The learner can:

- 1 explain the use of benchmarks in managing performance
- 2 explain a range of quality management techniques to manage team performance
- 3 describe constraints on the ability to amend priorities and plans

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

The learner can:

- 1 identify the strengths, competences and expertise of team members
- 2 allocate work on the basis of the strengths, competences and expertise of team members
- 3 identify areas for improvement in team members' performance outputs and standards
- 4 amend priorities and plans to take account of changing circumstances
- 5 recommend changes to systems and processes to improve the quality of work

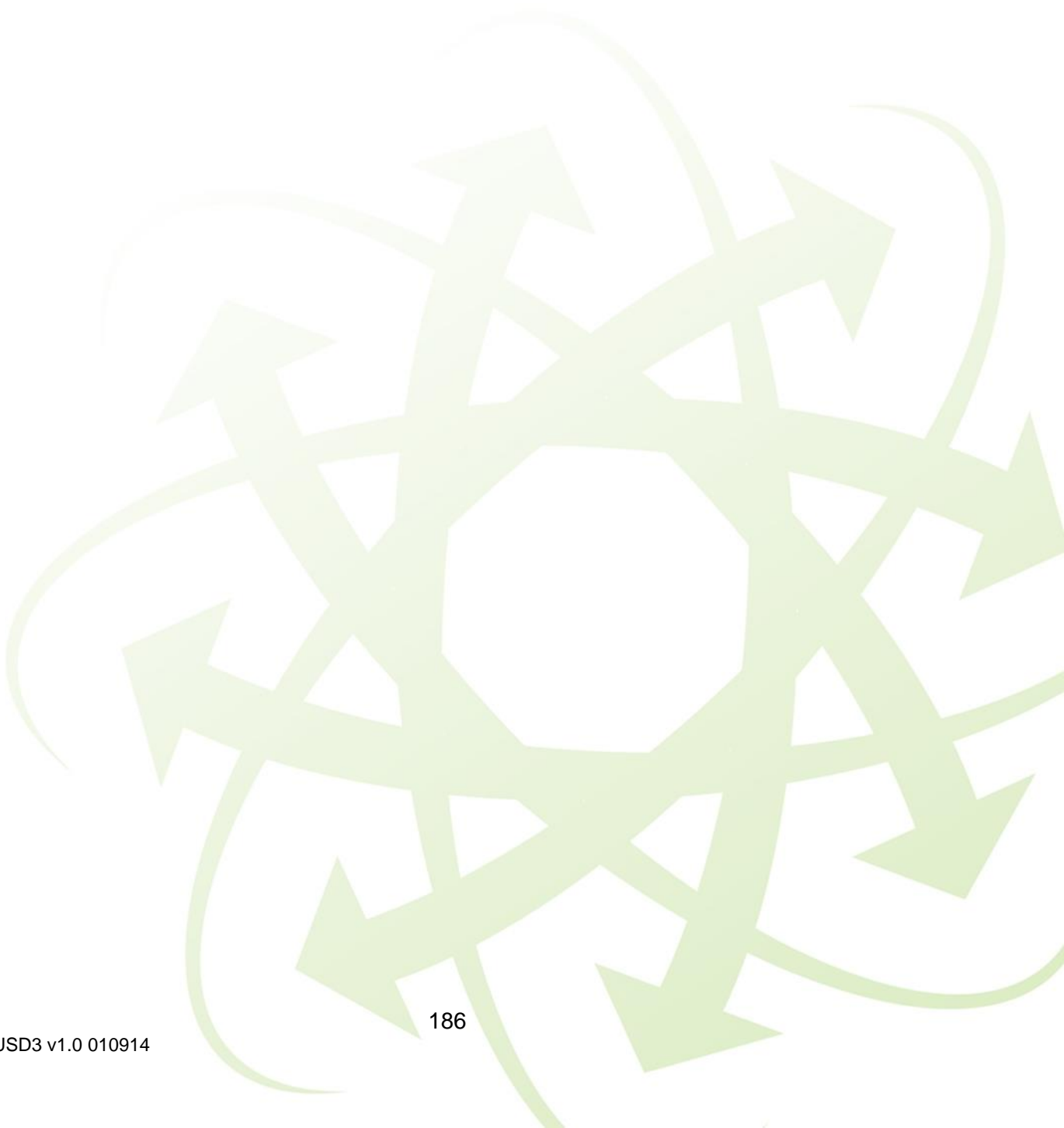
Outcome 3 Be able to manage communications within a team

The learner can:

- 1 explain to team members the lines of communication and authority levels
- 2 communicate individual and team objectives, responsibilities and priorities
- 3 use communication methods that are appropriate to the topics, audience and timescales
- 4 provide support to team members when they need it
- 5 agree with team members a process for providing feedback on work progress and any issues arising
- 6 review the effectiveness of team communications and make improvements

ML12

Manage individuals' performance



ML12 Manage individuals' performance

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of the management of underperformance in the workplace and the ability to manage individuals' performance in the workplace

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand the management of underperformance in the workplace
2. Be able to manage individuals' performance in the workplace

Guided learning hours

It is recommended that **20** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Organisational objectives are the overall goals, purpose and mission of a business as established by its management

Motivation techniques may include, but are not limited to:

- Incentives and rewards
- Flexible working arrangements
- Praise and gratitude
- Coaching or mentoring

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML12 Manage individuals' performance

Learning outcomes and assessment criteria

Outcome 1 Understand the management of underperformance in the workplace

The learner can:

- 1 explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance
- 2 explain how to identify causes of underperformance
- 3 explain the purpose of making individuals aware of their underperformance clearly but sensitively
- 4 sensitively
- 5 explain how to address issues that hamper individuals' performance
- 6 explain how to agree a course of action to address underperformance

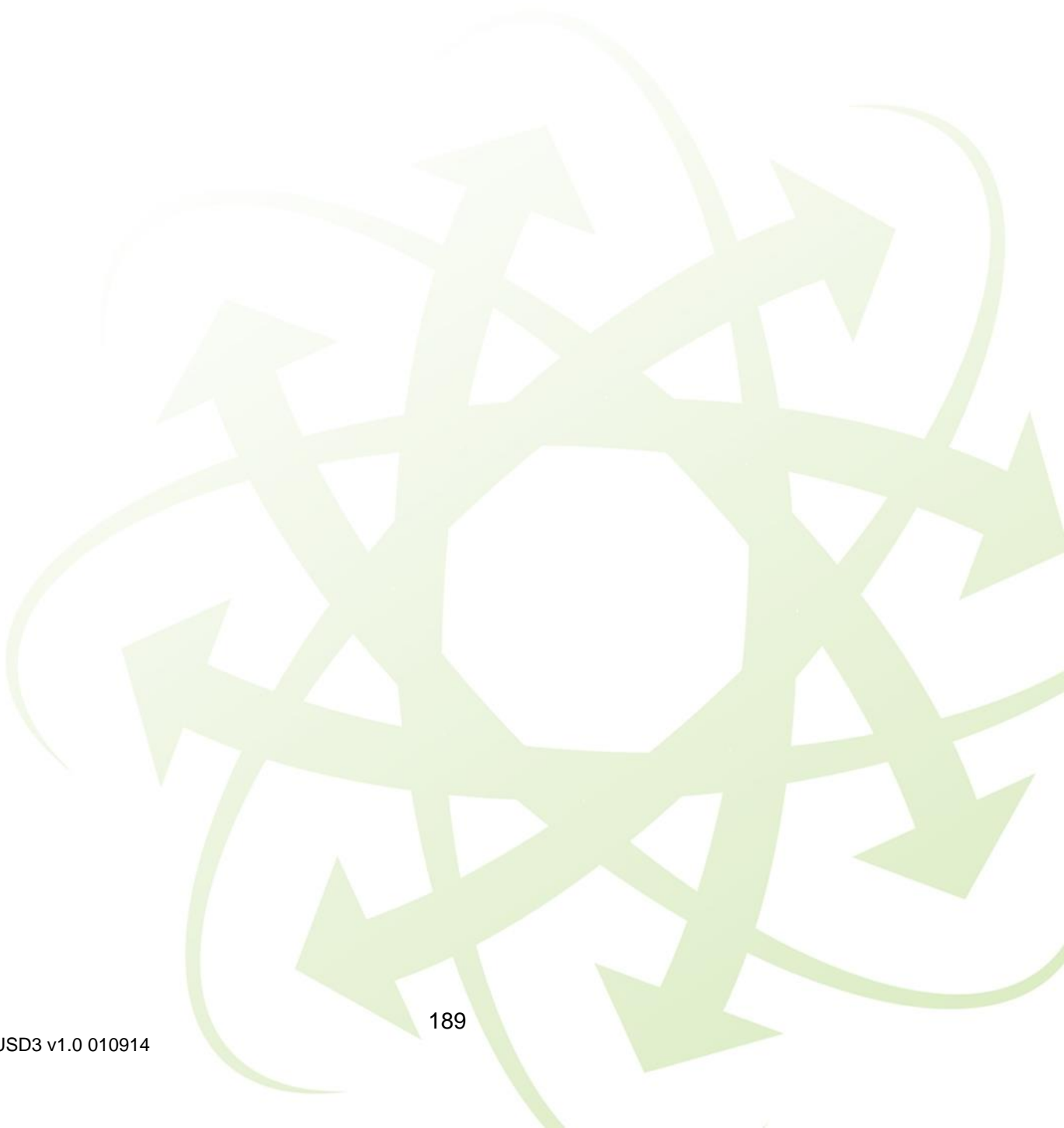
Outcome 2 Be able to manage individuals' performance in the workplace

The learner can:

- 1 agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives
- 2 delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs
- 3 apply motivation techniques to maintain morale
- 4 provide information, resources and ongoing mentoring to help individuals meet their targets, objectives and quality standards
- 5 monitor individuals' progress towards objectives in accordance with agreed plans
- 6 recognise individuals' achievement of targets and quality standards
- 7 adhere to organisational policies and procedures, and legal and ethical requirements when managing

ML13

Manage individuals' development in the workplace



ML13 Manage individuals' development in the workplace

Level: 3

Credit value: 3

Unit aim

The aim of this unit is to provide learners with the ability to carry out performance appraisals and use that information to support the learning and development of individual team members

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Be able to carry out performance appraisals
2. Be able to support the learning and development of individual team members

Guided learning hours

It is recommended that **10** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML13 Manage individuals' development in the workplace

Learning outcomes and assessment criteria

Outcome 1 Be able to carry out performance appraisals

The learner can:

- 1 explain the purpose of performance reviews and appraisals
- 2 explain techniques to prepare for and carry out appraisals
- 3 provide a private environment in which to carry out appraisals
- 4 carry out performance reviews and appraisals in accordance with organisational policies and procedures
- 5 provide clear, specific and evidence based feedback sensitively
- 6 agree future actions that are consistent with appraisal findings and identified development needs

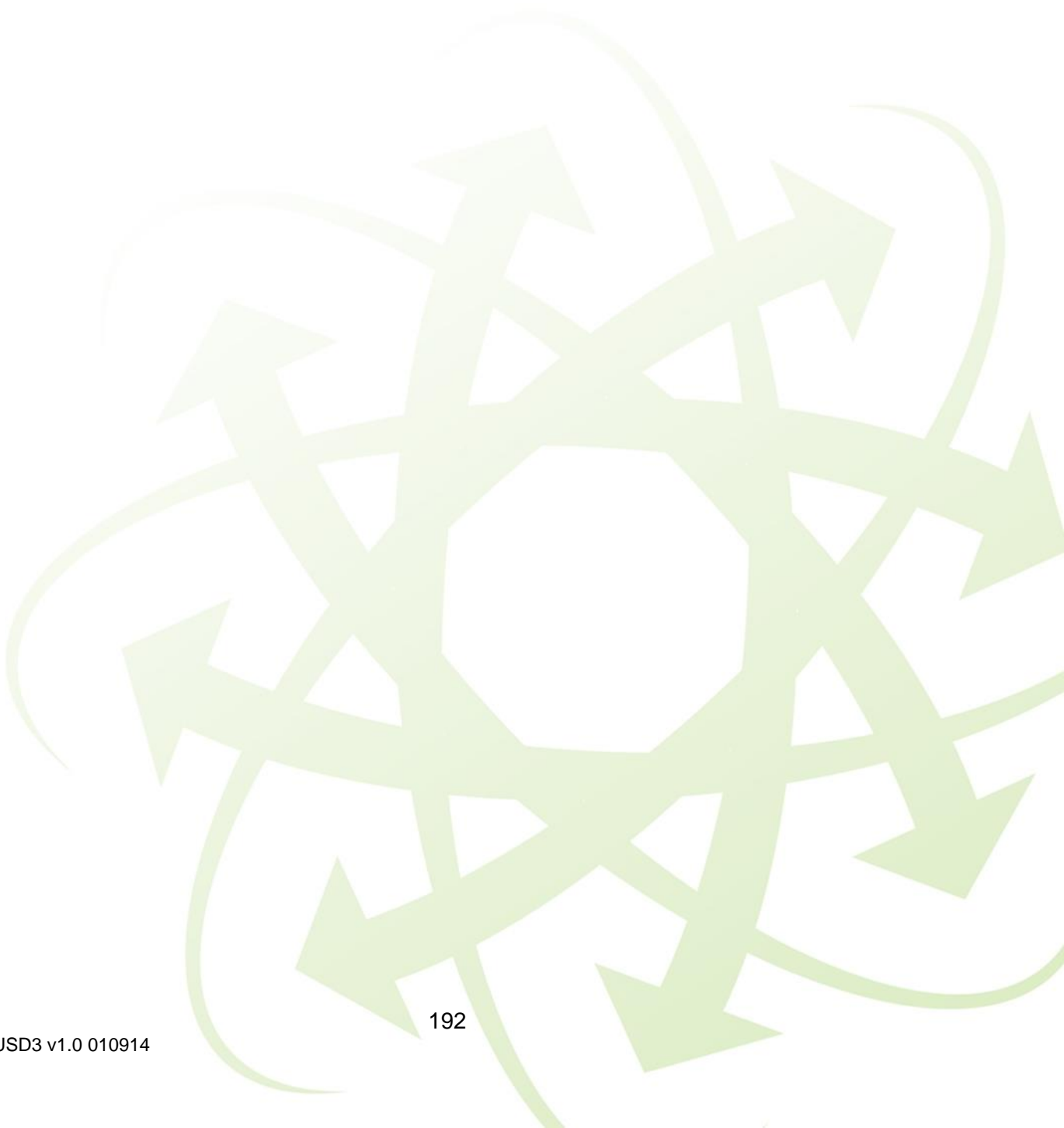
Outcome 2 Be able to support the learning and development of individual team members

The learner can:

- 1 describe training techniques that can be applied in the workplace
- 2 analyse the advantages and disadvantages of learning and development interventions and methods
- 3 explain organisational learning and development policies and resource availability
- 4 review individuals' learning and development needs at regular intervals
- 5 suggest learning and development opportunities and interventions that are likely to meet individual and business needs

ML14

Chair and lead meetings



ML14 Chair and lead meetings

Level: 3

Credit value: 3

Unit aim

The aim of this unit is to provide learners with the ability to prepare to lead meetings. It also provide learners with the ability to chair and lead meetings and to deal with post-meeting matters.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Be able to prepare to lead meetings
2. Be able to chair and lead meetings
3. Be able to deal with post-meeting matters

Guided learning hours

It is recommended that **10** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Formal procedures may include, but not be limited to:

- Setting the time, date and place of meeting
- Sending out invites
- Setting an agenda

Business conventions are a set of rules that govern the way each meeting is managed

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML14 Chair and lead meetings

Learning outcomes and assessment criteria

Outcome 1 Be able to prepare to lead meetings

The learner can:

- 1 identify the type, purpose, objectives, and background to a meeting
- 2 identify those individuals expected, and those required to attend a meeting
- 3 prepare for any formal procedures that apply to a meeting
- 4 describe ways of minimising likely problems in a meeting
- 5 take action to ensure that meeting documentation is prepared correctly and distributed to the agreed people within the agreed timescale

Outcome 2 Be able to chair and lead meetings

The learner can:

- 1 follow business conventions in the conduct of a meeting
- 2 facilitate meetings so that everyone is involved and the optimum possible consensus is achieved
- 3 manage the agenda within the timescale of the meeting
- 4 summarise the agreed actions, allocated responsibilities, timescales and any future arrangements

Outcome 3 Be able to deal with post-meeting matters

The learner can:

- 1 take action to ensure that accurate records of a meeting are produced and distributed in the agreed format and timescale
- 2 take action to ensure that post-meeting actions are completed
- 3 evaluate the effectiveness of a meeting and identify points for future improvement

ML16

Encourage innovation



ML16 Encourage innovation

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with the ability to identify opportunities for innovation, to generate and test ideas for innovation and improvement and to implement innovative ideas and improvements.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Be able to identify opportunities for innovation
2. Be able to generate and test ideas for innovation and improvement
3. Be able to implement innovative ideas and improvements

Guided learning hours

It is recommended that **14** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Techniques may include, but are not exclusive to;

- Brainstorming
- NGT – Nominal Group Technique
- Use of customer feedback
- Attribute listing
- Need identification
- Synetics
- Idea screening

Stakeholders may include, but are not exclusive to:

- Shareholders
- Directors
- Colleagues and managers
- Customers
- The local community in which a business operates
- Standards agencies

Innovate refers to making positive changes to current methods, ideas or products
Simulation is not allowed.

Value refers to the benefits of the ideas and could include: increased work place efficiency, greater market share, increased turnover, customer satisfaction, improved social/environmental reputation etc.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML16 Encourage innovation

Learning outcomes and assessment criteria

Outcome 1 Be able to identify opportunities for innovation

The learner can:

- 1 analyse the advantages and disadvantages of techniques used to generate ideas
- 2 explain how innovation benefits an organisation
- 3 explain the constraints on their own ability to make changes
- 4 agree with stakeholders terms of reference and criteria for evaluating potential innovation and improvement
- 5 engage team members in finding opportunities to innovate and suggest improvements
- 6 monitor performance, products and/or services and developments in areas that may benefit from innovation
- 7 analyse valid information to identify opportunities for innovation and improvement

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

The learner can:

- 1 generate ideas for innovation or improvement that meet the agreed criteria
- 2 test selected ideas that meet viability criteria
- 3 evaluate the fitness for purpose and value of the selected ideas
- 4 assess potential innovations and improvements against the agreed evaluation criteria
- 5 generate ideas for innovation or improvement that meet the agreed criteria
- 6 test selected ideas that meet viability criteria
- 7 evaluate the fitness for purpose and value of the selected ideas
- 8 assess potential innovations and improvements against the agreed evaluation criteria

Outcome 3 Be able to implement innovative ideas and improvements

The learner can:

- 1 explain the risks of implementing innovative ideas and improvements
- 2 justify conclusions of efficiency and value with evidence
- 3 prepare costings and schedules of work that will enable efficient implementation
- 4 design processes that support efficient implementation

ML18

Procure products and/or services



ML18 Procure products and/or services

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with the ability to identify procurement requirements, to select suppliers and to use that information to buy products and/or services.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Be able to identify procurement requirements
2. Be able to select suppliers
3. Be able to buy products and/or services

Guided learning hours

It is recommended that **35** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Sustainability is defined as 'avoiding the depletion of natural resources in the procurement process'.

Risk includes risks to the business and organisation as well as health and safety risks.

Learners should be able to identify the options of **media** that are available to demonstrate their selection and use of appropriate media.

Capability and track record may be in the context of internal to or external to the learner's organisation

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML18 Procure products and/or services

Learning outcomes and assessment criteria

Outcome 1 Be able to identify procurement requirements

The learner can:

- 1 explain current and likely future procurement requirements
- 2 decide whether the purchase of products and/or services offers the organisation best value
- 3 evaluate ethical and sustainability considerations relating to procurement
- 4 justify the decision to buy products and/or services with evidence of an analysis of risk, costs and benefits

Outcome 2 Be able to select suppliers

The learner can:

- 1 explain the factors to be taken into account in selecting suppliers
- 2 explain organisational procurement policies, procedures and standards
- 3 explain the effect of supplier choice on the supply chain
- 4 use appropriate media to publicise procurement requirements
- 5 confirm the capability and track record of suppliers and their products and/or services
- 6 select suppliers that meet the procurement specification

Outcome 3 Be able to buy products and/or services

The learner can:

- 1 explain the action to be taken in the event of problems arising
- 2 agree contract terms that are mutually acceptable within their own scope of authority
- 3 record agreements made, stating the specification, contract terms and any post-contract requirements
- 4 adhere to organisational policies and procedures, legal and ethical requirements

ML19

Implement change



ML19 Implement change

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of the principles of change management. It will also provide learners with the ability to plan the implementation of change, to manage the implementation of a change of plan and to evaluate the effectiveness of the implementation of change plans

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the principles of change management
2. Be able to plan the implementation of change
3. Be able to manage the implementation of a change of plan
4. Be able to evaluate the effectiveness of the implementation of change plans

Guided learning hours

It is recommended that **28** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Change management models might include:

- Lewin – force field analysis
- Kotter - 8 steps
- Nudge theory
- Psychological contract
- Fisher – personal change

Techniques used to analyse the effectiveness of change may include, but are not exclusive to;

- Impact evaluation
- Process evaluation
- Outcome or summative evaluation
- Data analysis
- Feedback
- Observations
- Meetings

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML19 Implement change

Learning outcomes and assessment criteria

Outcome 1 Understand the principles of change management

The learner can:

- 1 explain the importance of effective leadership when implementing change
- 2 explain the role of internal and external stakeholders in the management of change
- 3 evaluate the suitability of change management models for different contexts
- 4 explain how to assess the business risks associated with change
- 5 assess the need for contingency planning when implementing change
- 6 assess the need for crisis management when implementing change
- 7 explain the different types of barriers to change and how to deal with these
- 8 explain how to evaluate change management projects

Outcome 2 Be able to plan the implementation of change

The learner can:

- 1 explain the need for change
- 2 explain the potential consequences of not implementing change
- 3 explain the roles and responsibilities of a change management project team
- 4 develop a plan that includes specific, measurable, achievable, realistic and time-bound (SMART) objectives and resources
- 5 brief team members on their roles and responsibilities and the objectives of the change
- 6 gain acceptance to the need for change from team members and other stakeholders

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

The learner can:

- 1 explain organisational escalation processes for reporting problems
- 2 analyse the advantages and disadvantages of monitoring techniques
- 3 implement the plan within the agreed timescale
- 4 provide support to team members and other stakeholders according to identified needs
- 5 monitor the progress of the implementation against the plan
- 6 manage problems in accordance with contingency plans

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

The learner can:

- 1 assess the suitability of techniques used to analyse the effectiveness of change
- 2 collate valid feedback and information from stakeholders
- 3 analyse feedback and information against agreed criteria
- 4 identify areas for future improvement
- 5 communicate the lessons learned with those who may benefit

ML20

**Implement and maintain business
continuity plans and processes**



ML20 Implement and maintain business continuity plans and processes

Level: 3

Credit value: 4

Unit aim

The aim of this unit is to provide learners with the ability to plan for the implementation of business continuity plans and processes, to implement business continuity plans and processes and to maintain the fitness for purpose of on-going business continuity plans and processes

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Be able to plan for the implementation of business continuity plans and processes
2. Be able to implement business continuity plans and processes
3. Be able to maintain the fitness for purpose of on-going business continuity plans and processes

Guided learning hours

It is recommended that **25** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

A **business continuity plan** sets out how the business will operate following an incident and how it expects to return to 'business as usual' in the quickest possible time. Such as:

- Supply chain interruption
- Loss or damage to an important resource (both physical and electronic)

Business critical refers to anything that is necessary for a business to be successful

Business continuity management is about identifying those parts of the business that cannot afford to be lost, such as:

- Information
- Premises
- Stock
- Staff

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML20 Implement and maintain business continuity plans and processes

Learning outcomes and assessment criteria

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

The learner can:

- 1 describe the components of a business continuity plan
- 2 explain the uses of a business continuity plan
- 3 explain the features of different business continuity planning models
- 4 explain the potential consequences of inadequate business continuity plans and processes
- 5 confirm the required aim, scope and objectives of business continuity plans
- 6 engage stakeholders in developing business continuity plans and processes
- 7 identify business-critical products and/or services and the activities and resources that support them

Outcome 2 Be able to implement business continuity plans and processes

The learner can:

- 1 develop a framework for business continuity management
- 2 recommend resources that are proportionate to the potential impact of business disruption
- 3 communicate the importance and requirements of business continuity plans and processes to stakeholders
- 4 meet their own objectives within the plan

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

The learner can:

- 1 provide training for staff who may be affected
- 2 validate and test the strength of business continuity plans and processes
- 3 update plans and processes in the light of feedback from business continuity exercises and other sources of information

ML23

Participate in a project



ML23 Participate in a project

Level: 3

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of how to manage a project and the ability to support the delivery of a project

Learning outcomes

There are **two** outcomes to this unit. The learner will:

1. Understand how to manage a project
2. Be able to support the delivery of a project

Guided learning hours

It is recommended that **19** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Project lifecycle explanations should include,

- Initiation
- Planning
- Execution
- Evaluation

Project monitoring techniques may include but are not exclusive to,

- Pulse meetings
- Variance reports
- Programme reviews
- Technical reviews
- Project forecasting
- Problem-solving
- Management reviews
- Use of dashboards/logs

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML23 Participate in a project

Learning outcomes and assessment criteria

Outcome 1 Understand how to manage a project

The learner can:

- 1 explain the features of a project business case
- 2 explain the stages of a project lifecycle
- 3 explain the roles of people involved in a project
- 4 explain the uses of project-related information
- 5 explain the advantages and limitations of different project monitoring techniques
- 6 analyse the interrelationship of project scope, schedule, finance, risk, quality and resources

Outcome 2 Be able to support the delivery of a project

The learner can:

- 1 fulfil their role in accordance with a project plan
- 2 collect project-related information in accordance with project plans
- 3 use appropriate tools to analyse project information
- 4 report on information analysis in the agreed format and timescale
- 5 draw issues, anomalies and potential problems to the attention of project managers
- 6 adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project

ML25

Develop and maintain professional networks



ML25 Develop and maintain professional networks

Level: 4

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of the principles of effective networking. It will also provide learners with the ability to identify professional networks for development and to maintain professional networks.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the principles of effective networking
2. Be able to identify professional networks for development
3. Be able to maintain professional networks

Guided learning hours

It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Networks could cover:

- Online networking (social media)
- Face-to-face networking
- Professional network services
- Formal networking (weekly/monthly meetings and referrals)

Ethical issues could relate but not be limited to:

- The Data Protection Act
- Conflicts of interest

The boundaries of confidentiality will vary but must adhere to The Data Protection Act

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML25 Develop and maintain professional networks

Learning outcomes and assessment criteria

Outcome 1 Understand the principles of effective networking

The learner can:

- 1 describe the interpersonal skills needed for effective networking
- 2 explain the basis on which to choose networks to be developed
- 3 evaluate the role of shared agendas and conflict management in relationship-building
- 4 evaluate the role of the internet in business networking
- 5 assess the importance of following up leads and actions
- 6 analyse ethical issues relating to networking activities

Outcome 2 Be able to identify professional networks for development

The learner can:

- 1 identify potential networks for professional development from an analysis of their benefits compared with individual needs and aspirations
- 2 shortlist networks for development against defined criteria
- 3 assess the benefits and limitations of joining and maintaining selected network(s)

Outcome 3 Be able to maintain professional networks

The learner can:

- 1 identify the potential for mutual benefit with network members
- 2 promote their own skills, knowledge and competence to network members
- 3 provide information, services or support to network members where the potential for mutual benefit has been identified
- 4 establish the boundaries of confidentiality
- 5 agree guidelines for the exchange of information and resources
- 6 take action to ensure that participation in networks reflects current and defined future aspirations and needs
- 7 make introductions to people with common or complementary interest to and within networks

ML27

Develop and implement an operational plan



ML27 Develop and implement an operational plan

Level: 4

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of the principles of operational planning. It will also to provide learners with the ability to develop and implement an operational plan and to evaluate the effectiveness of it.

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the principles of operational planning
2. Be able to develop an operational plan
3. Be able to implement an operational plan
4. Be able to evaluate the effectiveness of an operational plan

Guided learning hours

It is recommended that **24** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Risk analysis techniques might include, but are not exclusive to:

- Failure mode and criticality analysis
- Fault trees
- Identification of risk associated with ; health and safety, security, finance and environment

Planning tools might include, but are not exclusive to:

- Fishbone diagrams
- Gantt charts
- Critical path analysis
- Business process modelling

Periodic reviews could include milestone reviews with teams or individuals and will be in relation to the length of the project plan

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML27 Develop and implement an operational plan

Learning outcomes and assessment criteria

Outcome 1 Understand the principles of operational planning

The learner can:

- 1 evaluate the use of risk analysis techniques in operational planning
- 2 explain the components of an operational plan
- 3 analyse the relationship between strategic and operational plans
- 4 evaluate the use of planning tools and techniques in the operational planning process
- 5 explain how to carry out a cost-benefit analysis

Outcome 2 Be able to develop an operational plan

The learner can:

- 1 identify specific, measurable, achievable, realistic and time-bound (SMART) objectives and key performance indicators (KPIs)
- 2 identify evaluation mechanisms appropriate to the plan
- 3 take action to ensure that plans are consistent with organisational strategy, objectives, values, policies and procedures
- 4 develop proportionate and targeted plans to manage identified risks
- 5 take action to ensure that plans complement and maximise synergy with other business areas
- 6 adhere to organisational policies and procedures, legal and ethical requirements

Outcome 3 Be able to implement an operational plan

The learner can:

- 1 implement plans within agreed budgets and timescales
- 2 communicate the requirements of the plans to those who will be affected
- 3 revise plans in the light of changing circumstances in accordance with strategic objectives and identified risks

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

The learner can:

- 1 conduct periodic reviews of the progress and effectiveness of the plans, using information from a range of sources
- 2 report on the effectiveness of operational plans in the appropriate format

ML34

Manage physical resources



ML34 Manage physical resources

Level: 4

Credit value: 4

Unit aim

The aim of this unit is to provide learners with the ability to identify the need for physical resources and to obtain and manage the use of those physical resources

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Be able to identify the need for physical resources
2. Be able to obtain physical resources
3. Be able to manage the use of physical resources

Guided learning hours

It is recommended that **26** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Resource requirements should be substantial and make a significant contribution to the work and objectives of the organisation. This relates to all criteria in this unit.

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML34 Manage physical resources

Learning outcomes and assessment criteria

Outcome 1 Be able to identify the need for physical resources

The learner can:

- 1 identify resource requirements from analyses of organisational needs
- 2 evaluate alternative options for obtaining physical resources
- 3 evaluate the impact on the organisation of introducing physical resources
- 4 identify the optimum option that meets operational requirements for physical resources

Outcome 2 Be able to obtain physical resources

The learner can:

- 1 develop a business case for physical resources that is supported by evidence, cost estimates, contingency arrangements and an analysis of likely benefits
- 2 obtain authorisation and financial commitment for the required expenditure
- 3 negotiate best value from contracts in accordance with organisational standards and procedures
- 4 adhere to organisational policies and procedures, legal and ethical requirements when obtaining physical resources
- 5 check that the physical resources received match those ordered

Outcome 3 Be able to manage the use of physical resources

The learner can:

- 1 take action to ensure physical resources are used in accordance with manufacturers' instructions
- 2 evaluate the efficiency of physical resources against agreed criteria
- 3 recommend improvements to the use of physical resources and associated working practices
- 4 analyse the benefits of effective equipment in the conservation of energy and the environment

ML36

Prepare for and support quality audits



ML36 Prepare for and support quality audits

Level: 4

Credit value: 3

Unit aim

The aim of this unit is to provide learners with an understanding of the principles underpinning the management of quality. It will also provide learners with the ability to prepare for, and to support, quality audits

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the principles underpinning the management of quality
2. Be able to prepare for quality audits
3. Be able to support quality audits

Guided learning hours

It is recommended that **17** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Quality management will be sector specific, but could include:

- Quality planning
- Quality control
- Quality assurance
- Quality improvement

Quality standards could refer to:

- Legislation
- British Standards and ISO
- Kitemark
- CE Mark
- Royal Warrants
- Branding

Quality techniques could include:

- Total quality management (TQM)
- Statistical process control (SPC)
- Continual improvement processes

Non-compliance is the failure to adhere to an Act or its Regulations

Non-conformance is the failure to comply with a requirement, standard, or procedure

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML36 Prepare for and support quality audits

Learning outcomes and assessment criteria

Outcome 1 Understand the principles underpinning the management of quality

The learner can:

- 1 analyse the principles of quality management
- 2 analyse the purpose and requirements of a range of quality standards
- 3 analyse the advantages and limitations of a range of quality techniques
- 4 assess how the management of quality contributes to the achievement of organisational objectives

Outcome 2 Be able to prepare for quality audits

The learner can:

- 1 establish the quality requirements applicable to the work being audited
- 2 confirm that documentation is complete
- 3 confirm that any previously agreed actions have been implemented
- 4 make available information requested in advance by auditors

Outcome 3 Be able to support quality audits

The learner can:

- 1 provide access to information on request within scope of the audit
- 2 agree actions and timescales with auditors that will remedy non-conformance or non-compliance
- 3 identify instances where business processes, quality standards and/or procedures could be improved
- 4 develop a quality improvement plan that addresses the issues raised

ML38

Manage a budget



ML38 Manage a budget

Level: 4

Credit value: 4

Unit aim

The aim of this unit is to provide learners with an understanding of how to identify financial requirements and to set budgets. This unit will also provide learners with the ability to manage a budget and to evaluate the use of that budget

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand how to identify financial requirements
2. Understand how to set budgets
3. Be able to manage a budget
4. Be able to evaluate the use of a budget

Guided learning hours

It is recommended that **26** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Stakeholders may include, but are not limited to:

- Shareholders
- Directors
- Managers
- Customers
- Colleagues
- Organisations
- Members of the public

Contingencies are unforeseen events or costs

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML38 Manage a budget

Learning outcomes and assessment criteria

Outcome 1 Understand how to identify financial requirements

The learner can:

- 1 explain how to calculate the estimated costs of activities, resources and overheads needed to achieve objectives
- 2 analyse the components of a business case to meet organisational requirements
- 3 analyse the factors to be taken into account to secure the support of stakeholders
- 4 describe the business planning and budget-setting cycle

Outcome 2 Understand how to set budgets

The learner can:

- 1 explain the purposes of budget-setting
- 2 analyse the information needed to enable realistic budgets to be set
- 3 explain how to address contingencies
- 4 explain organisational policies and procedures on budget-setting

Outcome 3 Be able to manage a budget

The learner can:

- 1 use the budget to control performance and expenditure
- 2 identify the cause of variations from budget
- 3 explain the actions to be taken to address variations from budget
- 4 propose realistic revisions to budget, supporting recommendations with evidence
- 5 provide budget-related reports and information within agreed timescales
- 6 explain the actions to be taken in the event of suspected instances of fraud or malpractice

Outcome 4 Be able to evaluate the use of a budget

The learner can:

- 1 identify successes and areas for improvement in budget management
- 2 make recommendations to improve future budget setting and management

ML40

Manage a project



ML40 Manage a project

Level: 4

Credit value: 7

Unit aim

The aim of this unit is to provide learners with an understanding of the management of a project. It will also provide learners with the ability to plan and manage a project and to evaluate its effectiveness.

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the management of a project
2. Be able to plan a project
3. Be able to manage a project
4. Be able to evaluate the effectiveness of a project

Guided learning hours

It is recommended that **38** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML40 Manage a project

Learning outcomes and assessment criteria

Outcome 1 Understand the management of a project

The learner can:

- 1 explain how to carry out a cost-benefit analysis for a project
- 2 evaluate the use of risk analysis techniques
- 3 evaluate project planning and management tools and techniques
- 4 evaluate the impact of changes to project scope, schedule, finance, risk, quality and resources
- 5 analyse the requirements of project governance arrangements

Outcome 2 Be able to plan a project

The learner can:

- 1 analyse how a project fits with an organisation's overall vision, objectives, plans and programmes of work
- 2 agree the objectives and scope of proposed projects with stakeholders
- 3 assess the interdependencies and potential risks within a project
- 4 develop a project plan with specific, measurable, achievable, realistic and time-bound (SMART) objectives, key performance indicators (KPIs) and evaluations mechanisms appropriate to the plan
- 5 develop proportionate and targeted plans to manage identified risks and contingencies
- 6 apply project lifecycle approaches to the progress of a project

Outcome 3 Be able to manage a project

The learner can:

- 1 allocate resources in accordance with the project plan
- 2 brief project team members on their roles and responsibilities
- 3 implement plans within agreed budgets and timescales
- 4 communicate the requirements of the plans to those who will be affected
- 5 revise plans in the light of changing circumstances in accordance with project objectives and identified risks
- 6 keep stakeholders up to date with developments and problems
- 7 complete close-out actions in accordance with project plans
- 8 adhere to organisational policies and procedures, legal and ethical requirements when managing a project

Outcome 4 Be able to evaluate the effectiveness of a project

The learner can:

- 1 conduct periodic reviews of the progress and effectiveness of a project using information from a range of sources
- 2 evaluate the effectiveness of capturing and managing project-related knowledge
- 3 report on the effectiveness of plans

ML41

Manage business risk



ML41 Manage business risk

Level: 4

Credit value: 6

Unit aim

The aim of this unit is to provide learners with an understanding of the management of business risk and to provide them with the ability to address and mitigate business risk.

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand the management of business risk
2. Be able to address business risk
3. Be able to mitigate business risk

Guided learning hours

It is recommended that **27** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Theories could include, but are not exclusive to:

- Contingency model of strategic risk
- Theory of stakeholder identification

Theories and models need to be relevant to learners work environment and organisation.

Measures and techniques may include, but are not limited to:

- Avoidance
- Loss control
- Risk retention
- Risk transfer

Monitoring might include, but is not limited to:

- Observation
- Reviews of targets
- Work sampling
- Feedback given from others

Potential risks can include, but are not limited to:

- Changes in policy / legislation externally
- Changes in finance – profits and loss
- Change in consumer / customer preferences / tastes
- Increased competition
- Strikes

Risk management plans could include, but are not limited to:

- Strategy
- Avoiding risk
- Controlling and mitigation of risk
- Risk acceptance

- Risk transference

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.



ML41 Manage business risk

Learning outcomes and assessment criteria

Outcome 1 Understand the management of business risk

The learner can:

- 1 explain what is meant by business risk
- 2 analyse business risk identification theories and models
- 3 explain measures and techniques to mitigate business risk
- 4 explain their own level of authority in managing risk

Outcome 2 Be able to address business risk

The learner can:

- 1 monitor work in line with organisational risk procedures
- 2 identify potential risks using agreed risk criteria
- 3 assess identified risks, their potential consequences and the probability of them happening
- 4 communicate to stakeholders the likelihood of the risk occurring and its potential consequences
- 5 explain organisational business risk management policies

Outcome 3 Be able to mitigate business risk

The learner can:

- 1 develop risk management plans and processes that are proportionate to the risk and the available resources
- 2 implement risk management plans in accordance with organisational requirements
- 3 monitor on-going risk-related developments and amend plans in the light of changing circumstances
- 4 keep stakeholders informed of any developments and their possible consequences
- 5 evaluate the effectiveness of actions taken, identifying possible future improvements

ML43

Recruitment, selection and induction practice



ML43 Recruitment, selection and induction practice

Level: 4

Credit value: 6

Unit aim

The aim of this unit is to provide learners with an understanding of the principles and theories underpinning recruitment, selection and induction practice. It will also provide learners with the ability to recruit and induct people into an organisation and to select appropriate people for the role

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the principles and theories underpinning recruitment, selection and induction practice
2. Be able to recruit people into an organisation
3. Be able to select appropriate people for the role
4. Be able to induct people into an organisation

Guided learning hours

It is recommended that **33** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Assessment guidance

Simulation is not allowed.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML43 Recruitment, selection and induction practice

Learning outcomes and assessment criteria

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

The learner can:

- 1 explain workforce planning techniques
- 2 describe the information needed to identify recruitment requirements
- 3 assess the impact of an organisation's structure and culture on its recruitment and selection policies and practices
- 4 analyse the factors involved in establishing recruitment and selection criteria
- 5 evaluate the suitability of different recruitment and selection methods for different roles
- 6 analyse patterns of employment that affect the recruitment of staff
- 7 explain the factors to be taken into account when developing job specifications, personal specifications and job advertisements
- 8 explain the induction process
- 9 explain the relationship between human resource processes and the induction processes

Outcome 2 Be able to recruit people into an organisation

The learner can:

- 1 determine current staffing needs
- 2 identify current skills needs from identified staffing needs
- 3 identify future workforce needs
- 4 develop a resourcing plan that addresses identified needs within budgetary limitations
- 5 evaluate the cost-effectiveness of different methods of recruitment for an identified role
- 6 explain how recruitment policies and practices meet legal and ethical requirements
- 7 select the most appropriate method of recruitment for identified roles

Outcome 3 Be able to select appropriate people for the role

The learner can:

- 1 plan assessment processes that are valid and reliable
- 2 provide those involved in the selection process with sufficient information to enable them to make informed decisions
- 3 justify assessment decisions with evidence
- 4 inform applicants of the outcome of the process in line with organisational procedures
- 5 evaluate the effectiveness of the selection process
- 6 adhere to organisational policies and procedures, legal and ethical requirements when carrying out selection assessments

Outcome 4 Be able to induct people into an organisation

The learner can:

- 1 develop induction materials that meet operational and new starters' needs
- 2 explain to new starters organisational policies, procedures and structures to new starters
- 3 explain to new starters their role and responsibilities
- 4 explain to new starters their entitlements and where to go for help
- 5 assess new starters' training needs
- 6 confirm that training is available that meets operational and new starters' needs
- 7 provide support that meets new starters' needs throughout the induction period

7.5 Group C - optional units



CUS26

Understand the customer service environment



CUS26 Understand the customer service environment

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of the concepts and practices underpinning customer service delivery, the implications of legislation of that delivery and the structure of customer service. These units will also provide learners with an understanding of the relationship between customer service and a brand.

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the concepts and practices underpinning customer service delivery
2. Understand the relationship between customer service and a brand
3. Understand the structure of customer service
4. Understand the implications of legislation on customer service delivery

Guided learning hours

It is recommended that **40** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Competitive is as good as or better than others of a comparable nature

Service failure is where the customer service standard and/or customer expectations have not been met

Service profit chain is the relationships between profitability, customer loyalty, and employee satisfaction, loyalty, and productivity

Brand is a type of product /service provided by a particular company under a specific name

Consumer-related legislation may include:

- Sales of Good Act 1979
- Consumer Protection Act 1987

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for customer service.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

CUS26 Understand the customer service environment

Learning outcomes and assessment criteria

Outcome 1 Understand the concepts and practices underpinning customer service delivery

The learner can:

- 1 explain the value of customer service as a competitive tool
- 2 explain the process of mapping the customer journey and its importance in delivering effective customer service
- 3 describe techniques used to identify service failures
- 4 explain the concept and importance of the service profit chain
- 5 describe methods of measuring organisational effectiveness in the delivery of customer service

Outcome 2 Understand the relationship between customer service and a brand

The learner can:

- 1 explain the importance of a brand to customers and to an organisation
- 2 explain how branding can influence customers' perception of an organisation and its products and/or services
- 3 explain the potential impact of good and poor customer service on a brand

Outcome 3 Understand the structure of customer service

The learner can:

- 1 explain the features of different customer service models and customer service standards
- 2 explain the relationship between customer service and operational areas of an organisation
- 3 explain the relationship between customer service and continuous improvement processes
- 4 explain the costs and benefits of customer service to an organisation
- 5 explain the impact of organisational values on how customers create their expectations
- 6 explain how organisational values impact on meeting customer expectations

Outcome 4 Understand the implications of legislation on customer service delivery

The learner can:

- 1 explain the implications of consumer-related legislation on customer service delivery
- 2 explain the implications of confidentiality and data protection legislation for the collection, storage and use of customer information

MK1

Principles of market research



MK1 Principles of market research

Level: 3

Credit value: 5

Unit aim

The aim of this unit is to provide learners with an understanding of the basis on which market research is commissioned and how to design market research projects. It will also provide learners with an understanding of principles of marketing data collection and interpretation and evaluation of that data.

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the basis on which market research is commissioned
2. Understand how to design market research projects
3. Understand the principles of marketing data collection
4. Understand the principles of marketing data interpretation and evaluation

Guided learning hours

It is recommended that **40** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for sales.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

MK1 Principles of market research

Learning outcomes and assessment criteria

Outcome 1 Understand the basis on which market research is commissioned

The learner can:

- 1 describe how to identify the need for market research and the sources of evidence to support this
- 2 describe the basis for scoping the research and identifying linkages, interdependencies and the possible impact of one element on others
- 3 explain how to set research parameters, aims and evaluation criteria
- 4 explain the importance of involving stakeholders in the definition of research to be carried out
- 5 explain how to evaluate different options for conducting the research

Outcome 2 Understand how to design market research projects

The learner can:

- 1 explain how to set research objectives, timescales, budget and resource requirements and success criteria
- 2 explain how to specify the characteristics and size of the sample to be researched in accordance with the research aims and objectives
- 3 describe the factors to be taken into account when selecting research instruments that are fit for purpose
- 4 explain how to ensure the suitability of methods chosen to conduct research
- 5 explain the strengths and limitations of quantitative and qualitative research
- 6 explain how risks inherent in market research may be addressed
- 7 explain how to ensure that research data collected is valid and reliable
- 8 describe the uses of the research outputs
- 9 explain how to obtain approval to the proposed research

Outcome 3 Understand the principles of marketing data collection

The learner can:

- 1 explain the difference between primary and secondary research and how this affects data collection methods and interpretation
- 2 describe the importance of using research instruments correctly
- 3 explain the role of data collection in a market research project
- 4 explain how to address problems arising in data collection (eg insufficiency of representative sample, unreliable or invalid data)
- 5 explain the importance of accurate data collection and recording
- 6 explain marketing data storage, security and access requirements

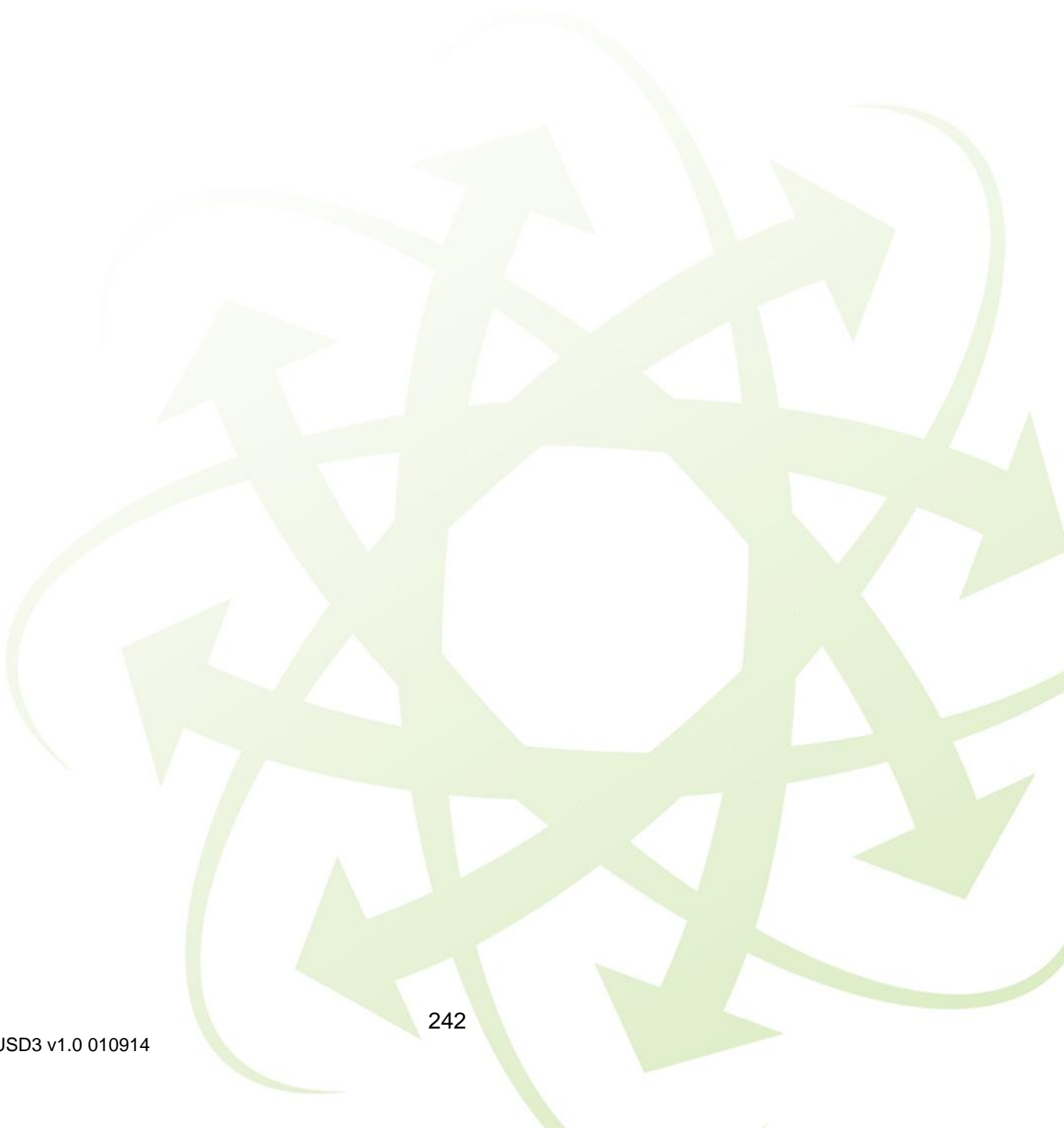
Outcome 4 Understand the principles of marketing data interpretation and evaluation

The learner can:

- 1 explain the volume of data needed to ensure statistical confidence
- 2 explain how to evaluate the quality, reliability and validity of market research data
- 3 describe the use(s) of market research
- 4 explain the application, strengths and weaknesses of different data analysis methods
- 5 explain the use of statistical tools to identify trends, causes and correlations in marketing data
- 6 explain the strengths and weaknesses of different data evaluation methods
- 7 explain the basis on which to reach conclusions as to the usefulness of the research

MK2

Principles of marketing and evaluation



MK2 Principles of marketing and evaluation

Level: 3

Credit value: 7

Unit aim

The aim of this unit is to provide learners with an understanding of the principles of market segmentation and how to assess market opportunities for new products and/or services. It will also provide learners with an understanding of the principles of marketing strategy development and how to evaluate the effectiveness of a marketing strategy

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the principles of market segmentation
2. Understand how to assess market opportunities for new products and/or services
3. Understand the principles of marketing strategy development
4. Understand how to evaluate the effectiveness of a marketing strategy

Guided learning hours

It is recommended that **50** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for sales.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

MK2 Principles of marketing and evaluation

Learning outcomes and assessment criteria

Outcome 1 Understand the principles of market segmentation

The learner can:

- 1 explain the importance of defining market segments to the development and achievement of the marketing strategy
- 2 explain the difference between market segments and customer classification
- 3 explain how the characteristics, motivations and behaviours of potential target customers are identified
- 4 explain how to cluster customers with similar characteristics
- 5 describe how to confirm that proposed segments are real, distinctive, viable and their buying power measurable
- 6 explain how to evaluate the profitability and stability of market segments
- 7 describe how a range of products may appeal to different market segments
- 8 explain the motivators and inhibitors that influence customer behaviour
- 9 explain the use of Customer Relationship Management

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

The learner can:

- 1 describe the economic and buyer behavioural factors to be taken into account when assessing new market opportunities
- 2 describe the cultural factors that are likely to affect customers' perception of products and/or services and sales performance
- 3 explain how to identify opportunities and threats in new markets and for new products in existing markets
- 4 explain how competitor and potential competitor activity may affect projected sales performance
- 5 explain the basis of recommendations to exploit new market opportunities

Outcome 3 Understand the principles of marketing strategy development

The learner can:

- 1 describe the topics to be addressed in a marketing strategy
- 2 explain the use of market analyses to inform the development of a marketing strategy
- 3 explain how to evaluate risks to the achievement of objectives
- 4 describe how to forecast sales by product and/or service
- 5 explain how to present a marketing strategy including aims, objectives, actions, accountabilities, resources, budgets and forecasts
- 6 explain the importance of engaging stakeholders in the development of a marketing strategy
- 7 explain the significance of customer loyalty to the achievement of marketing objectives and strategy
- 8 explain how to set performance indicators and evaluation arrangements that are capable of measuring returns on investment

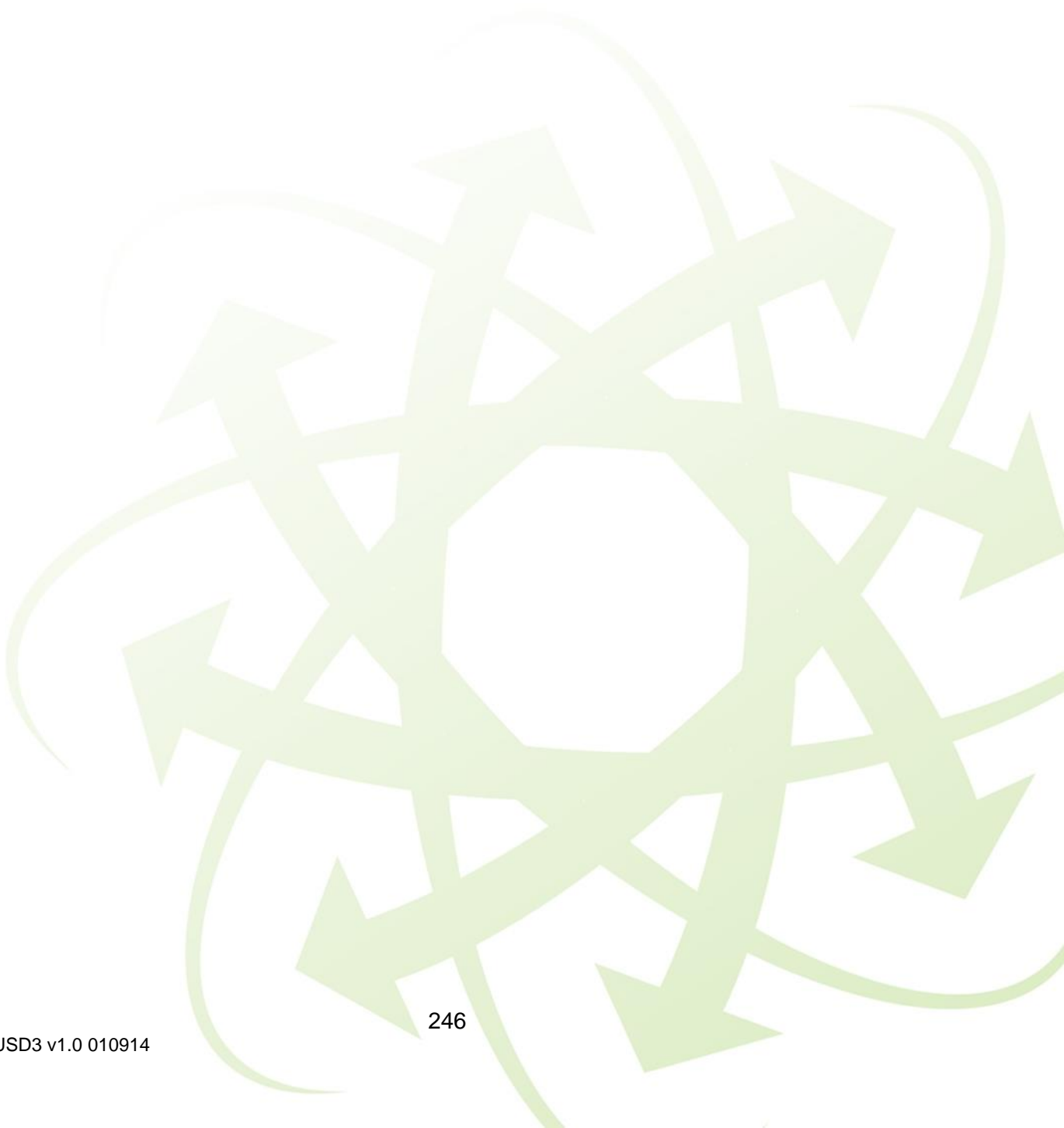
Outcome 4 Understand how to evaluate the effectiveness of a marketing strategy

The learner can:

- 1 explain the importance of conducting the evaluation in accordance with the specification
- 2 describe the factors to be taken into account in the evaluation of the effectiveness of a marketing strategy
- 3 explain the strengths and weaknesses of different evaluation methods
- 4 describe how to identify trends and themes from evaluation data
- 5 explain how to ensure the reliability and validity of evaluation data
- 6 explain how to achieve an acceptable level of statistical confidence
- 7 explain how to address critical issues revealed by evaluation
- 8 explain the importance of justifying recommendations and conclusions with evidence
- 9 explain the use of impact analysis in the evaluation process
- 10 explain the importance of marketing to the achievement of business objectives and strategies
- 11 describe the links between corporate social responsibility and marketing strategies

MK3

Principles of marketing stakeholder relationships



MK3 Principles of marketing stakeholder relationships

Level: 3

Credit value: 3

The aim of this unit is to provide learners with an understanding of marketing stakeholder relationships and how to build, manage, monitor and control marketing stakeholder relationships

Learning outcomes

There are **three** outcomes to this unit. The learner will:

1. Understand marketing stakeholder relationships
2. Understand how to build and manage marketing stakeholder relationships
3. Understand how to monitor and control marketing stakeholder relationships

Guided learning hours

It is recommended that **16** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for sales.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

MK3 Principles of marketing stakeholder relationships

Learning outcomes and assessment criteria

Outcome 1 Understand marketing stakeholder relationships

The learner can:

- 1 explain the basis on which the need for marketing stakeholder relationships are identified and prioritised
- 2 explain the use of stakeholder mapping in developing ways of building relationships
- 3 describe the nature of interest of different stakeholder groups and how this affects the nature of relationships and communications
- 4 explain the significance of stakeholders to the achievement of the overall marketing strategy
- 5 describe the features of the market in which stakeholders operate
- 6 describe how to establish stakeholders' attitudes to an organisation
- 7 describe actual and potential synergies and conflicts between clients and other stakeholders

Outcome 2 Understand how to build and manage marketing stakeholder relationships

The learner can:

- 1 explain how to identify common goals and potential synergy between stakeholders and an organisation
- 2 explain the importance of engaging stakeholders in marketing activities
- 3 explain the basis upon which stakeholder communications plans are developed
- 4 explain the requirements of a competitor management strategy
- 5 explain the importance of agreeing common objectives with clients
- 6 describe the scope of generalist and specialist personnel that can be deployed in support of building long term relationships with clients

Outcome 3 Understand how to monitor and control marketing stakeholder relationships

The learner can:

- 1 explain the use of key performance indicators and success criteria in monitoring the effectiveness of stakeholder relationships
- 2 describe methods of monitoring the ongoing effectiveness of stakeholder relationships
- 3 explain the importance of effective stakeholder communications and feedback system
- 4 explain how changes in the market environment in which stakeholders operate may have an impact on relationships
- 5 explain how to develop strategies and plans that address changing stakeholder attitudes and needs
- 6 explain how to develop reporting systems that meet agreed success criteria
- 7 explain the importance of reviewing the effectiveness of collaborative arrangements with stakeholders

ML15

Principles of leadership and management



ML15 Principles of leadership and management

Level: 3

Credit value: 8

Unit aim

The aim of this unit is to provide learners with an understanding of the principles of effective decision making, leadership styles and models and performance measurement. It will also provide learners with an understanding of the role, functions and processes of management.

Learning outcomes

There are **four** outcomes to this unit. The learner will:

1. Understand the principles of effective decision making
2. Understand leadership styles and models
3. Understand the role, functions and processes of management
4. Understand performance measurement

Guided learning hours

It is recommended that **50** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Potential impact might include, but is not exclusive to:

- Impact on teams
- Individuals
- Suppliers
- Stakeholders
- Managers

Leadership styles may include, but are not exclusive to:

- Autocratic
- Laissez-faire
- Situational leadership
- Transformational leadership
- Transactional leadership
- Charismatic
- Servant leader

Models of management may include, but are not exclusive to:

- Classical e.g Fayol, Tayler, Webber
- Human relations e.g. Mayo or Schein
- Neo human approaches e.g. Maslow, Mcgregor, Likert and Argyris

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for management.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

ML15 Principles of leadership and management

Learning outcomes and assessment criteria

Outcome 1 Understand the principles of effective decision making

The learner can:

- 1 explain the importance of defining the objectives, scope and success criteria of the decisions to be taken
- 2 assess the importance of analysing the potential impact of decision making
- 3 explain the importance of obtaining sufficient valid information to enable effective decision making
- 4 explain the importance of aligning decisions with business objectives, values and policies
- 5 explain how to validate information used in the decision making process
- 6 explain how to address issues that hamper the achievement of targets and quality standards

Outcome 2 Understand leadership styles and models

The learner can:

- 1 explain the difference in the influence on managers and leaders on their teams
- 2 evaluate the suitability and impact of different leadership styles in different contexts
- 3 analyse theories and models of motivation and their application in the workplace

Outcome 3 Understand the role, functions and processes of management

The learner can:

- 1 analyse a manager's responsibilities for planning, coordinating and controlling work
- 2 explain how managers ensure that team objectives are met
- 3 explain how a manager's role contributes to the achievement of an organisation's vision, mission and objectives
- 4 analyse theories and models of management
- 5 explain how the application of management theories guide a manager's actions
- 6 explain the operational constraints imposed by budgets

Outcome 4 Understand performance measurement

The learner can:

- 1 explain the relationship between business objectives and performance measures
- 2 explain the features of a performance measurement system
- 3 explain how to set key performance indicators (kpis)
- 4 explain the tools, processes and timetable for monitoring and reporting on business performance
- 5 explain the use of management accounts and management information systems in performance management
- 6 explain the distinction between outcomes and outputs

PDM3

Principles of digital marketing and research



PDM3 Principles of digital marketing and research

Level: 3

Credit value: 7

Unit aim

The aim of this unit is to provide learners with an understanding of the role and requirements of digital marketing and how to use digital technology for marketing purposes. It will also provide learners with an understanding of the principles of search engine optimisation (SEO), marketing research using the internet and digital marketing device and message design

Learning outcomes

There are **five** outcomes to this unit. The learner will:

1. Understand the role and requirements of digital marketing
2. Understand the principles of search engine optimisation (SEO)
3. Understand the principles of marketing research using the internet
4. Understand the principles of digital marketing device and message design
5. Understand how to use digital technology for marketing purposes

Guided learning hours

It is recommended that **50** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Assessment guidance

Simulation is not allowed.

Unit endorsement

This unit is endorsed by SkillsCfA who are the SSC for sales.

Evidence Requirements

Learners must provide a portfolio of evidence for this unit.

PDM3 Principles of digital marketing and research

Learning outcomes and assessment criteria

Outcome 1 Understand the role and requirements of digital marketing

The learner can:

- 1 explain the role of digital marketing within the overall marketing strategy
- 2 explain the strengths and weaknesses of digital marketing for different marketing applications
- 3 explain the importance of targeted digital marketing
- 4 describe the sources of data lists for use in targeting customers and potential customers
- 5 explain the legal requirements and implications of digital marketing
- 6 describe the design requirements of data capture and reporting systems for digital marketing
- 7 explain the importance of evaluating the impact of digital marketing activities

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

The learner can:

- 1 explain the importance of search engine optimisation
- 2 describe how to calculate the cost-efficiency of SEO
- 3 explain the use of Meta Tags, website codes and keywords
- 4 explain the use of offsite SEO in optimising marketing effectiveness
- 5 explain the design principles of response systems
- 6 explain the advantages and disadvantages of links to other websites

Outcome 3 Understand the principles of marketing research using the internet

The learner can:

- 1 explain the scope for customising search-related internet facilities to enable the identification and retrieval of targeted information
- 2 explain the advantages and disadvantages of different data mining techniques
- 3 explain how to use multiple-table relational databases
- 4 explain how to ensure the validity and reliability of information retrieved from the internet

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

The learner can:

- 1 explain the potential uses of a Customer Relationship Management (CRM) system
- 2 explain the design requirements of a CRM system
- 3 describe the characteristics of an effective digital marketing device
- 4 describe the characteristics of an effective digital response system
- 5 explain the requirements, advantages and disadvantages of different tracking systems
- 6 explain how to overcome the barriers posed by non-interoperable technologies

Outcome 5 Understand how to use digital technology for marketing purposes

The learner can:

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

RECP17

Principles of social media within a business



RECP17

Principles of social media within a business

Level: 3

Credit value: 6

Unit aim

This unit provides the necessary understanding of the fundamentals of social media marketing for a business.

Learning outcomes

There are five learning outcomes to this unit. The learner will:

1. Understand how social media fits into the objectives and marketing of a business
2. Understand how to select social media tools and channels for a business
3. Understand how to measure the success of using social media tools and channels
4. Understand how social media policy and guidelines can impact a business
5. Be able to monitor how a business is using social media

Guided learning hours

It is recommended that 42 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is endorsed by Skills CfA, the sector skills council for recruitment

Evidence requirements

Learners must provide a portfolio of evidence for this unit.

RECP17 Principles of social media within a business

Learning outcomes and assessment criteria

Outcome 1 Understand how social media fits into the objectives and marketing of a business

The learner can:

- 1 describe a business and its type, vision, aims, objectives and goals
- 2 identify the brand and values of a business and how these are portrayed to the audience of a business
- 3 describe the marketing tools available to a business
- 4 explain the consequences of using social media on the budget of different sizes and types of business
- 5 explain the benefits and consequences of encouraging amplification
- 6 explain the benefits and consequences of encouraging engagement
- 7 explain the factors to consider when identifying a social media plan for a business
- 8 explain how social media could fit into the marketing plan of a business

Outcome 2 Understand how to select social media tools and channels for a business

The learner can:

- 1 describe the different tools and channels that can be used for social media
- 2 describe the features and benefits of the different tools and channels that can be used for social media
- 3 identify the potential type of audience for each different tool and channel that can be used for social media
- 4 explain the factors to consider when selecting different tools and channels for social media
- 5 evaluate different tools and channels for social media for business use

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

The learner can:

- 1 explain the importance of measuring the outcomes of using different social media tools and channels
- 2 explain why SMARTER targets should be set for different social media tools and channels
- 3 describe the methods a business can use to measure and identify success of different social media tools and channels
- 4 describe what success could look like when using different social media tools and channels for different types and sizes of business

Outcome 4 Understand how social media policy and guidelines can impact a business

The learner can:

- 1 describe the components of a business's social media policy and guidelines
- 2 explain the importance of having a social media policy and guidelines
- 3 explain the importance of having a reputation management policy
- 4 describe the benefits of managing perception changes in a business's reputation
- 5 describe how to manage perception changes in a business's reputation

Outcome 5 Be able to monitor how a business is using social media

The learner can:

- 1 explain the importance of knowing how similar businesses or industries are using social media
- 2 explain how to monitor the ways similar businesses or industries are using social media
- 3 monitor how a business is using social media
- 4 identify improvements to a business's use of social media



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