



Handbook

PMD5 – VTCT (Skillsfirst) Level 5 Diploma in Principles
of Management and Leadership (RQF)

600/1912/8

Version 5.0

About Skillsfirst

VTCT is a market-leading Awarding, Assessment and End-point Assessment (EPA) Organisation offering vocational and technical qualifications in a range of 'services to people' sectors.

The VTCT group of companies are comprised of three innovative awarding brands: VTCT, iTEC and Skillsfirst. Together they have over 2,500 approved centres in over 40 countries across the world.

The qualifications suite offered by VTCT (Skillsfirst) spans a range of sectors including Childcare, Business Services, Health & Social Care, Recruitment and Social Media.

For more information visit us at www.vtct.org.uk and www.skillsfirst.co.uk, contact our dedicated Customer Support Team via email at customersupport@vtct.org.uk and customerservices@skillsfirst.co.uk or call 0121 270 5100

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1 Qualification at a glance

Qualification title	VTCT (Skillsfirst) Level 5 Diploma in Principles of Management and Leadership (RQF)
Qualification number	600/1912/8
Product code	PMD5
Age range	There are no age limits attached to learners undertaking this qualification, unless this is a legal requirement of the process or the environment.
Credits	40
Total Qualification Time (TQT)	400
Guided Learning (GL) hours	240
Assessment	<p>To be awarded this qualification, learners must successfully achieve the following assessments:</p> <ul style="list-style-type: none">• Portfolio of evidence• Skills-based assessment (if applicable)
Entry 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.
Legal considerations	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.
Support materials	Support materials can be found on the website (if applicable)

2 Qualification information

2.1 Qualification aim and design

The VTCT (Skillsfirst) Level 5 Diploma in Principles of Management and Leadership (RQF) has been designed to recognise the required skills and knowledge in Management and Leadership. It allows learners to apply this knowledge, understanding and skills to a national occupation level required by employers, thus proving competency in their job role. It is suitable for team leaders and junior managers across a wide variety of work areas in both the public and private sectors.

This qualification will allow learners to develop management, leadership and employability skills, which are all essential for the workplace. There is a wide range of optional units covering different aspects of management and leadership, which allows the learner choice to select units in a specialist area, or to spread their choice of units across several specialist areas.

2.2 Progression opportunities

As well as progression to further qualifications, such as the Level 5 NVQ Diploma in Management (RQF) or on to a Foundation Degree. Learners may also progress on to higher level employment opportunities.

3 Qualification structure

To be awarded the VTCT (Skillsfirst) Level 5 Diploma in Principles of Management and Leadership (RQF) learners must achieve all mandatory units. All **40** credits must be achieved, of which a minimum of **30** credits must be from optional units.

- **10** credits are from the mandatory unit (Group A)
- A minimum of **30** credits from the optional units (Group B)
- At least **35** credits must be at, or above, Level 5

The minimum TQT required to achieve this qualification is **400**.

Product code	Unit title	Level	Credit	Unit reference number
Mandatory units (Group A): 10 credits				
PM14	Principles of management and leadership	5	10	R/602/1366

Product code	Unit title	Level	Credit	Unit reference number
Optional units (Group B): A minimum of 30 credits				
PM15	Managing communications at work	4	5	F/602/1878
PM16	Personal development	5	5	J/602/1431
PM17	Leadership in your organisation	5	5	M/602/1438
PM18	Financial awareness for managers	5	5	K/602/1440
PM19	Management of change	5	5	A/602/1443
PM20	Management activities	5	10	D/602/1449
PM21	Managing projects	5	10	R/602/1464
PM22	Developing successful business teams	5	5	D/602/1466
PM23	Management decision making	5	10	K/602/2054
PM24	Recruitment and selection	5	5	J/602/1879
PM25	Managing staff performance	5	5	M/602/1469
PM26	Quality management in an organisation	6	5	Y/602/1479
PM27	Managing budgets	5	5	R/602/1481
PM28	Managing innovation in an organisation	6	5	D/602/1483
PM29	Marketing principles for managers	5	5	K/602/1485
PM30	Customer relationship management	5	5	M/602/2055
PM31	Principles of strategic management	6	5	A/602/1488

4 Centre requirements

4.1 Resources

Centres must possess the physical resources needed to support the delivery of the programme and the assessment of knowledge and skills, which should therefore be of industry standard. Where specific resources are required these have been indicated in individual units.

4.2 SkillsCfA

This qualification is based upon units developed by Pearson Education Limited which reflect the national occupation standards (NOS) for leadership and management. This qualification is endorsed by the SkillsCfA who are the sector skills council for these units and their contact details are:

SkillsCfA
Unit 110 Linton House
164 – 180 Union Street
London, SE1 0LH

Tel: 0207 091 9620

info@skillscfa.org

This handbook provides details from the SkillsCfA's assessment strategy, which centres will need to apply in order to assess and quality assure the Level 5 Diploma in Principles of Management and Leadership (RQF) and includes:

- occupational expertise of those who assess performance and internally verify assessments
- continuous professional development
- summary of assessment methods

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

4.3 The occupational competence of those involved in manager assessment and verification

They must demonstrate that they:

- have credible expertise in management and leadership relevant to the level(s)/units they are assessing or verifying.
- keep themselves up-to-date with developments in management and leadership practice;
- have a thorough understanding of the NOS for management and leadership at the unit(s)/level(s) they are assessing or verifying.

In addition they must have:

- an accredited assessor and/or verifier qualification, or
- a related qualification in assessment and/or verification that has been mapped to the national Occupational Standards for assessment and/or verifications, or
- evidence of undertaking an employer assessment programme that has been mapped to the national Occupational Standards for assessment and/or verifications

4.4 Employer direct model

The CfA feels that the Employer Direct Model of in-house assessment will encourage more employers to offer the Level 5 Diploma in Principles of Management and Leadership (RQF) particularly when they often have highly trained and experienced assessors, managers and trainers already in situ who meet or exceed the requirements of the recognised assessor and quality assurance qualifications. Wherever possible, the CfA works with employers to encourage assessment to be carried out by colleagues, supervisors and/or managers in a workplace environment. However, many employers see gaining the assessor and quality assurance qualifications as an obstacle and unnecessary given the experience and quality of their own internal assessors and trainers. The Employer Direct Model has been developed to meet the needs of specific employers based on their knowledge of the Leadership and Management NOS and qualifications and their history of internal assessor/internal verifier expertise.

The CFA supports this model with several provisos. The organisation must:

- liaise with an Awarding Organisation/Body who will be offering the qualification prior to beginning the process
- prepare, validate and review the assessment/verification roles
- carry out 100% mapping of the employers training to the National Occupational Standards or the assessor and quality assurance units which the qualifications are based on
- 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

The Awarding Organisation/Body must:

- offer this model to employers only
- inform the CfA of employers who are using this model
- supply the CfA with statistical data including take-up, sector, size of organisation etc. when requested
- keep the CfA informed of any problems/issues incurred in the delivery of this model

4.5 Continuous professional development (CPD)

Centres are expected to support their staff 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.

4.6 Total Qualification Time (TQT)

Each qualification has a Total Qualification Time (TQT) value based on the total number of hours learning required to achieve it. The TQT value reflects the number of supervised learning hours required to achieve the knowledge and assessment requirements, plus the length of time a learner would need to take to achieve the skills and capabilities to be deemed competent. All RQF qualifications are subject to an evaluation process to determine their fitness-for-purpose.

5 Assessment

5.1 Summary of assessment methods

For this qualification, learners will be required to provide evidence for each unit which may be supplied via observation of workplace activities, witness testimony, professional discussion and questions, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

5.2 Assessment through performance

The Level 5 Diploma in Principles of Management and Leadership (RQF) will be achieved through the acquisition of evidence by the learner and submission to their assessor. Units may be assessed through a number of different sources and forms. Simulation is allowed.

5.3 Recognition of prior learning (RPL)

RPL is a method of assessment that considers whether a learner can demonstrate that they can meet the assessment requirements for a component of a qualification through knowledge, understanding or skills that they already possess and do not need to develop through a course of learning. 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

This evidence will need to be referenced clearly on recording documentation and will need to be appropriately authenticated and validated, perhaps by an employer or expert witness.

Assessment must be valid and reliable to ensure the integrity of the award. The evidence gathered must meet the standards of the qualification or component and the assessment process must be subject to the same quality assurance procedures as any other assessment process.

In summary, evidence submitted to the RPL process must:

- be authentic and prove conclusively that RPL is based on the learner's own work;
- meet the requirements of the current the skills and knowledge requirements and be appropriate to the content of the component or qualification being considered for RPL;
- be sufficient to conclusively prove consistency of learner performance in meeting the skills and knowledge requirements.

6 Units

Unit Handbook

PM14 – Principles of management and leadership

Unit reference number: R/602/1366

Level: 5

Credit value: 10

Guided Learning (GL) hours: 60

Unit aim

This unit introduces learners to the development of practical leadership skills at a non-strategic level within a changing work environment. The unit focuses on understanding how current theories of management and leadership can be applied to specific workplace situations. Learners will examine the relationship between management and leadership, why these two concepts are often used interchangeably and the different perspectives, particularly in relation to the behaviour of managers/leaders. This unit will help learners to understand the personal and professional skills needed for effective management and leadership. Learners will examine the skills and attributes of successful leaders and investigate situations where different leadership styles are appropriate.

Applying leadership theories and models to specific situations will enable learners to assess the skills and competencies needed by a leader. The unit will draw on a selection of established principles, including situational and universal theories, as well as more recent work such as charismatic and visionary leadership. This will enable learners to compare and evaluate the usefulness of these theories and gain insights into specific leadership requirements in an organisation. In addition, learners will develop their own management and leadership skills through assessing requirements for their current or future job roles, considering these against occupational standards and competencies. Finally, the unit will enable learners to research a range of management and leadership development methods and evaluate the suitability of these when facing the challenges of leadership today.

Version 1.0

Learning outcomes

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

LO1 Understand the link between management and leadership

LO2 Understand the skills and styles of management and leadership

LO3 Be able to apply theory in an organisational context

LO4 Be able to plan for the development of leadership and management skills

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the link between management and leadership	1.1 Explain the relationship between management and leadership
	1.2 Analyse how management and leadership style impacts on the achievement of organisational objectives

Learning Outcome	Assessment Criteria
LO2 Understand the skills and styles of management and leadership	2.1 Explain the personal and professional skills required for effective management
	2.2 Compare the skills and styles of successful leaders
	2.3 Assess the expected impact of own leadership styles on work groups

Learning Outcome	Assessment Criteria
LO3 Be able to apply theory in an organisational context	3.1 Select appropriate theories of management and leadership to identify management and leadership requirements in given situations
	3.2 Report on the usefulness of using theories for gaining insights into leadership requirements in given situations

Learning Outcome	Assessment Criteria
LO4 Be able to plan for the development of leadership and management skills	4.1 Use appropriate methods to assess the skills needed by a leader in a given situation
	4.2 Plan the development of management and leadership skills for a given job role
	4.3 Make justified evaluations of the management and leadership development methods selected

PM14 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM15 – Managing communications at work

Unit reference number: F/602/1878

Level: 4

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

Effective communications are important for the success of any organisation, as they ensure understanding of, and involvement with, organisational policies, procedures and practices. Managerial decision making requires information to be communicated to interested parties so that they understand what is required of them and can act on it. Decision making involves different functional areas and their activities need to be synchronised to ensure they work effectively in contributing to organisational goals.

Communication is the means that enables this to happen. Communication also ensures that personnel are kept informed about what is required of them and how they contribute to the work the organisation. Communication provides a means of engaging and motivating staff. Managers need to possess and develop suitable communication skills to enable them to carry out their roles.

Organisations need to have effective communication systems to ensure correct information gets to those who need it, whether employees or customers, to enable them to take action and make reasoned decisions. Workplace communications systems need to be maintained and improved.

By considering the management of communications at work, learners will understand how it can enhance organisational activities.

Learning outcomes

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

LO1 Understand the role of communications in an organisation

LO2 Be able to manage interpersonal communication skills

LO3 Be able to manage workplace communications

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the role of communications in an organisation	1.1 Explain the communication processes used within a selected organisation
	1.2 Analyse the purpose of communication processes used within a selected organisation
	1.3 Analyse communication barriers in a selected organisation

Learning Outcome	Assessment Criteria
LO2 Be able to manage interpersonal communication skills	2.1 Audit own communication skills
	2.2 Demonstrate use of own communication skills in an organisational setting
	2.3 Evaluate effectiveness of own communication skills in an organisational setting
	2.4 Reduce a development plan to improve own communication skills, using feedback from others

Learning Outcome	Assessment Criteria
LO3 Be able to manage workplace communications	3.1 Plan improvements to workplace communications
	3.2 Implement a plan to improve workplace communications
	3.3 Develop measures to evaluate the success of a plan to improve workplace communications

PM15 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM16 – Personal development

Unit reference number: J/602/1431

Level: 5

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

This unit introduces learners to the importance of continuous personal and professional development through self-learning and analysis. It focuses on learners understanding how to enhance the skills needed for effective management to meet work and personal objectives, as well as improving their performance for future career development. Learners will have the opportunity to identify their own development needs through carrying out a skills audit to inform the personal development planning process.

All managers need effective time-management skills to meet organisational and personal objectives. This unit will enable learners to use tools to evaluate how they currently spend their time, and where improvements could be made. Using different sources of feedback and conducting their own skills analysis will help learners identify any skill gaps. They will be able to make suggestions for filling identified skills gaps and the resources needed to achieve them. This will then inform the structure of a personal development plan. Learners will be able to demonstrate they have a regularly updated and realistic personal development plan which fits with their own preferred learning style. The unit will enable learners to evaluate the effectiveness and impact of their learning on their personal and work objectives.

Evidence to achieve this unit will be generated continuously throughout the learning programme, enabling learners to take ownership of their future development needs.

Version 1.0

Learning outcomes

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

LO1 Be able to review time-management skills

LO2 Be able to complete a skills audit

LO3 Be able to produce a personal development plan

LO4 Be able to implement a personal development plan

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to review time-management skills	1.1 Explain the benefits of effective time management
	1.2 Review time-management skills to achieve organisational and personal objectives
	1.3 Use appropriate tools to conduct a time management analysis to recognise areas for improvement

Learning Outcome	Assessment Criteria
LO2 Be able to complete a skills audit	2.1 Explain the importance of continual self-development
	2.2 Use appropriate methods to assess skills and competencies against organisational and personal objectives
	2.3 Make suggestions for filling identified skills gaps

Learning Outcome	Assessment Criteria
LO3 Be able to produce a personal development plan	3.1 Produce a personal development plan against SMART objectives
	3.2 Plan resources needed to implement the personal development plan

Learning Outcome	Assessment Criteria
LO4 Be able to implement a personal development plan	4.1 Describe the importance of monitoring a personal development plan
	4.2 Use appropriate techniques to review the aims and objectives of a personal development plan
	4.3 Update the aims and objectives of a personal development plan

PM16 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM17 – Leadership in your organisation

Unit reference number: M/602/1438

Level: 5
Credit value: 5
Guided Learning (GL) hours: 30

Unit aim

This unit looks at the development of practical leadership skills at a non-strategic level within the rapidly changing working environment.

Learners will have the opportunity to explore, in depth, the attributes and skills of successful leaders. Learners will consider how leadership theories and models can be applied to specific situations in an organisational context and learn how leadership skills can be developed.

The unit enables learners to consider the impact that organisational context has on leadership styles. It also allows them to propose and evaluate the skills needed to meet specific organisational needs.

Learning outcomes

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

- LO1 Be able to provide leadership for a part of an organisation
- LO2 Understand how organisational context affects leadership style
- LO3 Be able to develop leadership skills to meet organisational needs

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to provide leadership for a part of an organisation	1.1 Communicate direction to a work group
	1.2 Explain how objective setting can be used to motivate others
	1.3 Set objectives that align with those of an organisation

Learning Outcome	Assessment Criteria
LO2 Understand how organisational context affects leadership style	2.1 Explain how the type of organisation impacts upon leadership style
	2.2 Explain how the type of work impacts upon leadership style
	2.3 Explain how the characteristics of employees impacts upon leadership style
	2.4 Evaluate how well the existing leadership meets the requirements of a selected work group in a given situation

Learning Outcome	Assessment Criteria
LO3 Be able to develop leadership skills to meet organisational needs	3.1 Define the leadership skills required for given organisational situations
	3.2 Propose methods to develop leadership skills for given organisational situations
	3.3 Critically evaluate the use of methods of leadership development within a given organisational situation

PM17 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM18 – Financial awareness for managers

Unit reference number: K/602/1440

Level: 5

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

Organisations need to ensure that they comply with a wide range of regulations to survive, including those that regulate the financial information an organisation needs to produce. In the case of profit-making organisations, a manager needs to understand the importance of this information not only for survival but also because of the need to be competitive by controlling costs and maximising income. In the case of public sector organisations or charities, this financial information is important in order to maximise their efficiency and provide value for money for the service or charity they offer. Managers need to know the limitations of this information and how to interpret it to enhance decision making.

This unit is designed to introduce learners to the nature, role and importance of this financial information in organisations. Learners will have the opportunity to look at the communication and interpretation of the financial information needed to manage organisations, its regulation, structuring and use in decision making. Learners will also have the opportunity to look at the principles of accounting, expected standards, and the concepts and conventions that influence the presentation of financial information. Learners will, through the examination of financial information, learn about the important issues relating to the measurement of efficiency, profitability and solvency, and the different demands different stakeholders make on organisations. Learners will also explore the extent to which external confidence is determined by financial performance. Finally, learners will examine how financial information can be interpreted through ratio analysis, analysed and evaluated, how costs in an organisation can be monitored and controlled, and how the concept of contribution aids decision making.

Learning outcomes

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

LO1 Know the key elements of accounting

LO2 Understand financial information

LO3 Be able to interpret financial information

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Know the key elements of accounting	1.1 Identify principles of accounting
	1.2 Describe the standards of accounting
	1.3 Outline accounting conventions

Learning Outcome	Assessment Criteria
LO2 Understand financial information	2.1 Explain types of financial information
	2.2 Analyse methods of comparing financial information
	2.3 Discuss the purpose of the reporting of information

Learning Outcome	Assessment Criteria
LO3 Be able to interpret financial information	3.1 Apply accounting ratios correctly
	3.2 Report accurately on financial ratios
	3.3 Evaluate the impact of financial ratios on the organisation and stakeholders

PM18 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM19 – Management of change

Unit reference number: A/602/1443

Level: 5

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

Research indicates that organisations undergo major change approximately once every three years, whilst smaller changes occur almost continually. There are no signs that this pace will slow down. Organisational change is increasing and all organisations are being challenged by change. There is no single model of change and no single solution to the effective management of the change process.

In this context managers need to be able to introduce and manage change to ensure the organisational objectives of change are met. They have to ensure that they gain the commitment of their staff, both during and after implementation. Often, at the same time, they need to ensure that business continues as usual. For these reasons, it is important that how change is managed is considered carefully by organisations. Whilst each change situation will be unique, there are still a

number of common themes that will help ensure the change process has the greatest chance of success.

It is important that resistance to change is managed appropriately as failed change efforts are costly to an organisation. Involving people from the beginning, explaining the reasons for change clearly, having a clear plan, direction and vision and respecting the viewpoints of others are all part of effective change management. People often do not like change if they have no sense of control over the process. If they are involved and have the opportunity to contribute to the process they are much more likely to embrace the change.

Learning outcomes

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

LO1 Be able to identify issues requiring change

LO2 Be able to plan for change

LO3 Be able to implement the change process

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to identify issues requiring change	1.1 Research the need for change
	1.2 Use models of change management to illustrate why change is required

Learning Outcome	Assessment Criteria
LO2 Be able to plan for change	2.1 Develop a plan for change using feedback from relevant/appropriate sources
	2.2 Report on the potential impact of change on resources
	2.3 Communicate the plan for change to key stakeholders

Learning Outcome	Assessment Criteria
LO3 Be able to implement the change process	3.1 Propose ways of overcoming resistance to planned change
	3.2 Develop systems for monitoring implementation of a plan for change
	3.3 Implement a plan for change
	3.4 Evaluate progress of change implementation against SMART objectives

PM19 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM20 – Management activities

Unit reference number: D/602/1449

Level: 5

Credit value: 10

Guided Learning (GL) hours: 60

Unit aim

For most managers the purpose of their role is to manage activities which contribute to the organisation achieving its mission and objectives. In this unit learners will consider the meaning and importance of the mission, structure and culture of organisations. This will give them the tools needed to evaluate the suitability of the organisational context for the current needs of a specific work group.

Learners will learn about a range of concepts, tools and models used to manage business activities. This will include customer orientation, project management techniques, business process modelling and lean management techniques. Learners will then study how to develop work plans by establishing work roles and allocating resources to meet organisational requirements. This will lead on to the setting of specific work objectives and to an investigation of the important area of quality.

Learners will also examine the benefits and barriers to delegation of work and learn how to decide on what to delegate and to whom, and the importance of monitoring delegation.

Finally, learners consider the related topic of health and safety legislation and how it has to be considered when managing any business activities. Learners will conduct a risk assessment and evaluate how well an organisation is complying with health and safety legislation.

Learning outcomes

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

LO1 Understand how organisational context affects business activities

LO2 Understand how techniques are used to manage activities

LO3 Be able to develop work plans

LO4 Be able to manage business activities

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how organisational context affects business activities	1.1 Explain how the mission of an organisation has influenced its structure
	1.2 Explain how the culture of an organisation has developed
	1.3 Evaluate the suitability of an organisational context to current requirements for a selected work group

Learning Outcome	Assessment Criteria
LO2 Understand how techniques are used to manage activities	2.1 Discuss the extent to which an operational area of an organisation is customer oriented
	2.2 Evaluate the use of operational management techniques in a specific context
	2.3 Explain how project management techniques could improve business activities

Learning Outcome	Assessment Criteria
LO3 Be able to develop work plans	3.1 Develop work plans to achieve given organisational objectives
	3.2 Develop objectives which are specific, measurable, achievable, realistic and time-bound
	3.3 Evaluate the suitability of existing quality standards for a given business activity

Learning Outcome	Assessment Criteria
LO4 Be able to manage business activities	4.1 Explain factors to be taken into account when making decisions about delegating work
	4.2 Evaluate the process used to delegate work in a selected work group
	4.3 Evaluate methods used to monitor work activities in a selected work group

PM20 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM21 – Managing projects

Unit reference number: R/602/1464

Level: 5

Credit value: 10

Guided Learning (GL) hours: 60

Unit aim

Most managers have to run projects, whether to launch services or products, hold one-off events or implement improvements to systems. This unit starts with the fundamentals of managing projects, including the nature of a project and the phases of a project. Learners will then consider the importance of determining success criteria.

Learners will study the all-important project planning methods which include the development of a project initiation document and use of project planning tools such as checklists, project work plans, Gantt charts and critical paths. They will also learn how to assess the risks of failure, how contingency plans can be devised to ameliorate the risks, how to develop a communications plan to monitor and control activities, and maintain a sense of direction for all stakeholders. Learners will go on to find out how to implement the project plan including communicating the project plan, allocating responsibilities, setting objectives and supporting team members. They will also learn about monitoring achievements against the project plan and how to modify project plans to ensure delivery is on time and as planned.

The final part of the unit is about post-project activities such as evaluating the project outcomes against the purpose of the project and the success criteria, reporting on what was learned from the project and making recommendations for running other similar projects. The assessment activities for this unit are both practical and theoretical and on completion of this unit learners will have acquired knowledge about project management techniques and the associated practical skills.

Learning outcomes

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

LO1 Understand the principles of project management

LO2 Be able to plan a project

LO3 Be able to manage the implementation of a project

LO4 Be able to present project outcomes to stakeholders

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

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Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the principles of project management	1.1 Explain the principles of project management
	1.2 Explain the importance of defining success/failure criteria when managing projects
	1.3 Compare the benefits of different systems of managing projects

Learning Outcome	Assessment Criteria
LO2 Be able to plan a project	2.1 Draft a project initiation document
	2.2 Plan a project using planning techniques
	2.3 Assess risks to on-time completion of a project
	2.4 Communicate project plan to stakeholders

Learning Outcome	Assessment Criteria
LO3 Be able to manage the implementation of a project	3.1 Implement a project according to a project plan
	3.2 Use project monitoring techniques to monitor the project
	3.3 Develop contingency plans to ensure on-time completion of a project

Learning Outcome	Assessment Criteria
LO4 Be able to present project outcomes to stakeholders	4.1 Value the outcomes of a project
	4.2 Present a report of the outcomes of a project to stakeholders
	4.3 Make recommendations for improvements to a project

PM21 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM22 – Developing successful business teams

Unit reference number: D/602/1466

Level: 5

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

Many organisations now focus on teams as a key element in their organisational structure. However, successful teams do not happen as a matter of chance. They have to be planned and supported if they are to become successful. Only then will they be able to work effectively as a team and meet their objectives. Planning to establish a successful business team requires an understanding of team dynamics and the importance of leading and developing of a team. Team dynamics are concerned with how teams evolve and the processes that determine whether the team is successful or not. For example, team member satisfaction will be derived not only from the achievement of tasks but also from the quality of team relationships and the more social aspects of teamwork. Building and maintaining a successful business team involves fostering constructive relationships between team members. This requires a commitment to open communication throughout the team. Maintaining levels of motivation in all team members is a crucial aspect of successful business teams. Signs of conflict in a team need to be resolved quickly as they can affect the stability and purpose of the team. Developing individual team members includes assigning personal goals that suit the strengths and skills of the individual, and ensuring that each member feels that their contribution to the team's overall task is valued. Team goals should be the foundation for developing successful business teams. Goals should be SMART and provide a clear, measurable framework whilst being flexible and adaptable in the light of changing circumstances. Goals need to provide scope for individual and team development whilst enabling organisational tasks to be achieved. Successful business teams monitor their activities, reflect on how they work and look for ways of improving their performance.

Learning outcomes

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

LO1 Understand the features of successful business teams

LO2 Be able to support team development

LO3 Be able to monitor the performance of teams

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the features of successful business teams	1.1 Describe the characteristics of successful business teams
	1.2 Assess the importance of team roles in successful business teams
	1.3 Analyse the value of using theoretical models when building successful business teams

Learning Outcome	Assessment Criteria
LO2 Be able to support team development	2.1 Explain the stages of team development
	2.2 Plan how to motivate team members to achieve given objectives
	2.3 Encourage open communication between team members to support team development
	2.4 Evaluate ways of resolving conflict between team members

Learning Outcome	Assessment Criteria
LO3 Be able to monitor the performance of teams	3.1 Monitor the performance of a team against given objectives
	3.2 Recommend how to improve performance against given objectives

PM22 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM23 – Management decision making

Unit reference number: K/602/2054

Level: 5

Credit value: 10

Guided Learning (GL) hours: 60

Unit aim

Organisations need to be responsive and adapt to market requirements. Managerial decision making needs to promote and support that responsiveness and to be adaptable to ensure that organisations maintain their competitive advantage. Decision making depends on having information that is relevant and timely and that can be used to justify decisions taken. Information and communications technology (ICT) has changed many aspects of the decision-making process. More information is available. It can be organised and analysed in more complex ways to provide a clearer insight into an organisation's activities. It is available instantly to the decision maker. In some cases, decisions may be taken automatically. Managerial decisions can be taken quickly and communicated instantly. New businesses have flourished by being able to exploit the improved decision-making capacity provided by ICT. Other organisations have adapted what they do to provide better services and products.

By considering decision making learners will understand how having good information allows managers to act to ensure an organisation's continuing success in competitive business environments.

Learning outcomes

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

LO1 Understand how information and knowledge informs management decision making

LO2 Understand how information and communication technology (ICT) supports management decision making

LO3 Be able to take management decisions

LO4 Be able to plan improvements to a management decision making system

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how information and knowledge informs management decision making	1.1 Explain how current information and knowledge needs for management decision making can be analysed
	1.2 Describe sources of information and knowledge that can support management decision making
	1.3 Evaluate the importance of information and knowledge in the management decision making process

Learning Outcome	Assessment Criteria
LO2 Understand how information and communication technology (ICT) supports management decision making	2.1 Identify the ICT systems that can provide information to support management decision making
	2.2 Assess the benefits of using information from ICT systems when making management decisions
	2.3 Explain how data protection legislation affects the use of information from ICT systems in the management decision process

Learning Outcome	Assessment Criteria
LO3 Be able to take management decisions	3.1 Analyse stakeholder needs and expectations
	3.2 Use current information and knowledge to identify an issue where a proactive decision is required
	3.3 Establish the outcomes that need to be achieved when making a management decision
	3.4 Justify the basis for making a management decision
	3.5 Take a management decision
	3.6 Communicate a management decision to stakeholders

Learning Outcome	Assessment Criteria
LO4 Be able to plan improvements to a management decision making system	4.1 Review a management decision making system
	4.2 Analyse the strengths and weaknesses of a management decision making system
	4.3 Plan justified improvements to a management decision making system

PM23 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM24 – Recruitment and selection

Unit reference number: J/602/1879

Level: 5

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

The success of organisations depends, in part, on employing the right people. The recruitment and selection process aims to ensure that personnel of the right calibre with suitable expertise and experience are selected to fill vacancies. How organisations establish that they have a staffing requirement that needs to be met is identified in this unit. Job analyses will specify the skills, expertise and capacity that are required.

Staff costs are significant and organisations manage this by making a business case for employing additional people. Organisations need to ensure that the processes and procedures involved in recruitment and selection, in addition to meeting organisational needs, are lawful and comply with internal organisational policies, which themselves have to incorporate legal requirements.

The process of selecting candidates needs to be organised and planned since structured recruitment and selection procedures are central to ensuring suitable personnel are appointed. Organisations with effective recruitment and selection processes and practices in place will make good appointments. In competitive labour markets this is a major advantage, so to maintain that advantage the selection and recruitment processes need to be reviewed and modified should improvements be identified and required.

By considering the topics of recruitment and selection learners will understand how having the right staff contributes to the achievement of organisational purposes.

Learning outcomes

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

LO1 Be able to analyse personnel requirements for job vacancies

LO2 Understand how employment legislation affects the recruitment of personnel

LO3 Be able to participate in recruitment and selection activities

LO4 Be able to propose improvements to recruitment and selection processes in an organisation

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to analyse personnel requirements for job vacancies	1.1 Analyse the personnel requirements for a specific vacancy within an organisation
	1.2 Produce a job description for a specific vacancy within an organisation
	1.3 Produce a person specification for a specific vacancy within an organisation

Learning Outcome	Assessment Criteria
LO2 Understand how employment legislation affects the recruitment of personnel	2.1 Explain the purpose of current employment legislation when recruiting personnel
	2.2 Evaluate how employment legislation is incorporated into organisational policies and procedures for the recruitment and selection of personnel

Learning Outcome	Assessment Criteria
LO3 Be able to participate in recruitment and selection activities	3.1 Prepare documentation for a selection interview for a specific vacancy
	3.2 Participate in a selection interview for a specific vacancy

Learning Outcome	Assessment Criteria
LO4 Be able to propose improvements to recruitment and selection processes in an organisation	4.1 Critically evaluate the recruitment process in an organisation
	4.2 Propose justified improvements to the recruitment process in an organisation

PM24 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM25 – Managing staff performance

Unit reference number: M/602/1469

Level: 5

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

This unit is concerned with the functions the manager carries out whilst monitoring and assessing the performance of staff. Monitoring should be seen as a developmental as well as a supervisory process with the object being to obtain information on the performance of staff in a way that can be used for developmental purposes.

In this unit, learners will develop the skills to set detailed work objectives for staff in an organisational context, and communicate these appropriately. Learners will monitor staff performance through organisational activities, and consider methods to improve the achievement of objectives.

Finally, learners will review work performance by undertaking formal or informal assessment processes and provide feedback and agree performance improvements with staff.

Learning outcomes

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

LO1 Be able to set detailed work objectives for staff

LO2 Be able to evaluate work activities against organisational requirements

LO3 Be able to review work performance of staff

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Be able to set detailed work objectives for staff	1.1 Explain the impact of the organisational context on the setting of objectives
	1.2 Set work objectives for staff
	1.3 Communicate work objectives to staff

Learning Outcome	Assessment Criteria
LO2 Be able to evaluate work activities against organisational requirements	2.1 Monitor work activities against organisational requirements
	2.2 Explain the methods that can be used to improve achievement of objectives
	2.3 Evaluate quality systems in an organisation

Learning Outcome	Assessment Criteria
LO3 Be able to review work performance of staff	3.1 Assess the performance of staff against work objectives
	3.2 Provide constructive feedback to staff
	3.3 Agree performance improvements with staff
	3.4 Evaluate options for dealing with underperformance of staff

PM25 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM26 – Quality management in an organisation

Unit reference number: Y/602/1479

Level: 6

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

Today, quality improvement in organisations is more important than ever. Not only in the pursuit of high standards for its own sake, but also because customer satisfaction is increasingly important as communications become more powerful and people and organisations have the tools to compare standards more effectively. Customers are also becoming more demanding in their expectations. In many cases, products are now more complex and all components, whether sourced internally or from suppliers, must be stringently checked. Learners will explore how the consequences of not meeting standards can mean long-term damage to an organisation's reputation.

This unit is designed to introduce learners to the concept of 'total quality' and how this can be achieved through Total Quality Management (TQM). TQM is a management approach to long-term success through customer satisfaction. Learners will find out that for TQM to be successful all members of the organisation need to participate in improving processes, services and the culture in which they work.

Learners will explore the origins of TQM by learning about the contributions of major theoreticians. The holistic nature of TQM will be emphasised, along with the need to manage change in both operational systems and organisational culture(s) to implement it successfully.

Learners are given the opportunity to focus on the need to empower and include individuals and teams in creating quality management processes. They will learn how important this is in successfully embedding TQM into an organisation and that this can be enhanced further by monitoring and controlling performance and compliance.

In addition, learners will be able to apply their understanding of the general principles of TQM via an analysis of the actions needed to achieve one of the more common quality standards.

Version 1.0

Learning outcomes

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

LO1 Understand the concept of Total Quality Management (TQM)

LO2 Understand the culture needed to embed TQM

LO3 Understand the systems that support TQM

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the concept of Total Quality Management (TQM)	1.1 Discuss the importance of quality within an organisation
	1.2 Explain the concept of Total Quality Management (TQM)
	1.3 Discuss the theories of TQM
	1.4 Analyse the difficulties associated with the implementation of TQM

Learning Outcome	Assessment Criteria
LO2 Understand the culture needed to embed TQM	2.1 Explain the importance of teamwork in TQM
	2.2 Discuss the role of training and development in embedding TQM into the culture of an organisation
	2.3 Analyse the management techniques which underpin successful integration of TQM into the culture of an organisation
	2.4 Evaluate the promotion of continuous quality improvement within an organisation's culture

Learning Outcome	Assessment Criteria
LO3 Understand the systems that support TQM	3.1 Describe methods of monitoring TQM
	3.2 Explain methods of controlling TQM
	3.3 Evaluate quality standards that support TQM

PM26 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM27 – Managing budgets

Unit reference number: R/602/1481

Level: 5

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

Organisations today are more complex than ever, operating in a constantly changing environment. With business environments becoming more cost constrained, complex and volatile, financial forecasting is becoming more than just an important part of project management. To stay competitive and viable, an organisation needs sound financial planning and budgeting to maximise control and knowledge of costs and income. It is important that managers making decisions understand these processes and are able to use them to inform decision making. This unit is designed to introduce learners to financial management, control and planning in an organisation. It gives learners the opportunity to examine a number of financial topics that directly affect the acquisition, maintenance and control of the financial resources of organisations.

Learners will examine issues associated with business planning, forecasting, the management of finance through the preparation of budgets and the control methodology associated with management by exception. Learners will look at the main issues relating to budgeting, planning and cost control, and how information derived from budgeting and associated procedures is used to inform management decision making.

Learners will examine how costs in an organisation are classified and how they can be monitored and controlled, as well as the concept of break even and how to calculate the total costs of products and services. Learners will have the opportunity to discover the value of costing techniques and will study the issues of planning and control through the preparation of cash budgets.

Learning outcomes

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

LO1 Understand the function of financial planning and forecasting

LO2 Understand break even analysis

LO3 Know how to compile budgets

LO4 Be able to interpret budgets to establish break even

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the function of financial planning and forecasting	1.1 Explain the long-term and short-term financial plans in an organisation
	1.2 Analyse the impact of internal and external factors on financial planning
	1.3 Explain the processes and techniques of financial forecasting for budgets

Learning Outcome	Assessment Criteria
LO2 Understand break even analysis	2.1 Explain types of cost
	2.2 Discuss cost control
	2.3 Explain break even analysis in financial forecasting

Learning Outcome	Assessment Criteria
LO3 Know how to compile budgets	3.1 Identify types of budgets
	3.2 Describe types of subsidiary budget
	3.3 Outline how a cash budget is compiled

Learning Outcome	Assessment Criteria
LO4 Be able to interpret budgets to establish break even	4.1 Create cash and subsidiary budgets
	4.2 Carry out break even analysis
	4.3 Report on the implications of budget and break even analysis to an organisation's financial plans

PM27 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM28 – Managing innovation in an organisation

Unit reference number: D/602/1483

Level: 6

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

The growing importance of innovation within organisations is well recognised, particularly as innovation can be seen as a powerful route to business success. Learners will learn that organisational innovation is a dynamic and iterative process of creating or modifying an idea and developing it to produce products, services, processes, structures or policies that are new to the organisation. It is important to understand that managers do not necessarily have to come up with all the good ideas themselves, but they do need to foster a climate where innovation is encouraged and where there are processes and procedures in place to ensure ideas are developed, tested and either progressed or eventually rejected. Learners will be able to recognise the type of climate that encourages innovation and the management styles that can be applied to develop this climate. Learners will also find about the different models that can be applied to develop innovation. Some organisations are reluctant to innovate because of perceived limitations.

Learners will recognise both the benefits and limitations of innovation and learn how these limitations can be overcome. Some organisations have been consistent in being innovative and learners will have the opportunity to learn why some organisations fare better than others. There are many 'terms' associated with innovation and learners will have the opportunity to compare the terms enterprise, entrepreneurship and creativity and their impact on, and links to, innovation. Learners will develop skills in using a range of methods to help staff to be creative. They will also learn how to carry out innovation audits to establish the current position of innovation within an organisation.

Learning outcomes

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

LO1 Understand how to manage innovation in an organisation

LO2 Be able to measure the level of innovation in a work group or organisation

LO3 Understand how organisational climate can foster innovation

LO4 Understand the methods that unlock innovation

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand how to manage innovation in an organisation	1.1 Discuss the role of innovation in an organisation
	1.2 Compare enterprise, entrepreneurship and creativity with innovation
	1.3 Discuss the benefits and limitations of innovation within an organisation

Learning Outcome	Assessment Criteria
LO2 Be able to measure the level of innovation in a work group or organisation	2.1 Apply innovation audits
	2.2 Evaluate innovation audit tools

Learning Outcome	Assessment Criteria
LO3 Understand how organisational climate can foster innovation	3.1 Explain the benefits to an organisation of being more innovative
	3.2 Analyse the management styles needed to foster an innovative climate in an organisation
	3.3 Discuss the features of a climate that fosters innovation in an organisation

Learning Outcome	Assessment Criteria
LO4 Understand the methods that unlock innovation	4.1 Analyse innovation models
	4.2 Compare idea generation models
	4.3 Evaluate organisational processes for selection and development of ideas

PM28 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM29 – Marketing principles for managers

Unit reference number: K/602/1485

Level: 5

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

All managers require some knowledge of marketing principles to gain a deeper understanding of their organisation's links with customers. This enables them to contribute effectively to the achievement of their organisation's marketing plans and to carry out effective internal marketing of their own area of work. Having an understanding of marketing principles will help managers appreciate how to identify potential customers, place and price their products compared to the competition, and position the company in the marketplace. It will also help identify future promotional opportunities. The application of marketing principles and techniques, such as developing effective marketing mix strategies, are crucial tools in helping organisations to achieve their corporate and marketing objectives. Through careful segmentation and targeting, businesses can often achieve competitive production and marketing costs, and become the preferred choice of customers and distributors. It is important that organisations deliver marketing activities that reflect the desired positioning of their products and services. In doing so, organisations also need to recognise the importance of establishing their brand values in the marketplace. Successfully achieving marketing and organisational goals depends on knowing the needs and wants of target markets and delivering desired satisfactions. To satisfy its organisational objectives, an organisation should anticipate the needs and wants of consumers and satisfy them more effectively than its competitors. Learners will gain an understanding of marketing principles and strategies that can help managers to achieve marketing and organisational goals in today's consumer-driven markets, where consumer wants are the drivers of all strategic marketing decisions.

Learning outcomes

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

LO1 Understand the contribution of marketing principles in achieving organisational aims and objectives

LO2 Be able to produce marketing mix proposals for marketing opportunities

LO3 Be able to develop strategies for implementing marketing mix proposals

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the contribution of marketing principles in achieving organisational aims and objectives	1.1 Explain how marketing principles can be used to achieve organisational aims and objectives
	1.2 Analyse the contribution of marketing principles in a given organisation to the achievement of their aims and objectives

Learning Outcome	Assessment Criteria
LO2 Be able to produce marketing mix proposals for marketing opportunities	2.1 Analyse the marketing mix of an identified marketing opportunity
	2.2 Develop a proposal to meet the needs of a defined group in the marketing mix
	2.3 Apply the concept of segmentation to a target market

Learning Outcome	Assessment Criteria
LO3 Be able to develop strategies for implementing marketing mix proposals	3.1 Identify the resources required to implement a marketing mix proposal
	3.2 Use marketing tools to inform the approach to branding in a marketing mix proposal
	3.3 Create a strategy for implementing a marketing mix proposal

PM29 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM30 – Customer relationship management

Unit reference number: M/602/2055

Level: 5

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

The combined effects of the growth of technology and the spread of globalisation mean that economies are moving away from the industrial age to the third age or knowledge era. Two interrelated features result from this. One is the continuous development of market expectations for customisation, rather than mass production of products and services, and the other is ever increasing levels of competition to supply them. Consequently, organisations are realising that they must get closer to their customers in order to survive. Customer orientation, customer service, relationship marketing, network management, customer value added, corporate inclusiveness and customer relationship management all share a common thread in enabling organisations to develop a nurturing relationship with their customers.

Customer relationship management (CRM) is a strategy used to learn about customer needs and their behaviour in order to build relationships with them. Customer relationship management encompasses marketing, sales, customer service, after sales service and technical support. The use of technology has enhanced the organisation, development and harmonisation of customer relationship management processes.

By considering customer relationship management learners will understand how the use of customer-related activities and the associated customer involvement, contribute to the achievement of organisational purposes.

Learning outcomes

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

LO1 Understand the importance of customer relationship management in organisations

LO2 Be able to propose ways to improve the management of customer relationships in an organisation

LO3 Be able to evaluate improvements to the management of customer relationships in an organisation

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand the importance of customer relationship management in organisations	1.1 Explain the importance of customer relationship management in organisations
	1.2 Discuss the movement from industrial to post-industrial economy in the development of customer relationship management
	1.3 Compare the benefits of market and customer orientation processes when managing customer relationships
	1.4 Explain the link between effective customer relationship management and competitive advantage

Learning Outcome	Assessment Criteria
LO2 Be able to propose ways to improve the management of customer relationships in an organisation	2.1 Evaluate customer relationship management in an organisation
	2.2 Propose ways to improve the management of customer relationships in an organisation

Learning Outcome	Assessment Criteria
LO3 Be able to evaluate improvements to the management of customer relationships in an organisation	3.1 Develop measures for monitoring a recently implemented improvement to the management of customer relationships in an organisation
	3.2 Monitor a recently implemented improvement to the management of customer relationships in an organisation
	3.3 Evaluate the outcomes of a recently implemented improvement to the management of customer relationships in an organisation

PM30 Document History

Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

Unit Handbook

PM31 – Principles of strategic management

Unit reference number: A/602/1488

Level: 6

Credit value: 5

Guided Learning (GL) hours: 30

Unit aim

Managers today need to take a longer-term view, beyond their immediate and operational level, to develop the information needed to improve their decision making and ensure direction for staff. This process has had several names over the years – strategic management, long range and corporate planning, business planning and policy. There are similarities and differences in approach that depend on the needs of the organisation and the context it operates in.

This unit is designed to introduce operational managers to the idea of strategic management as a tool for redirecting or repositioning the organisation in what it perceives, through analysis, to be more advantageous areas. Learners will explore how this can be achieved through setting clear business objectives and priorities. Learners will gain an understanding of how management needs to take a proactive rather than a reactive stance to a changing business climate.

This unit requires learners to have access to organisational plans and to senior managers who are implementing them. This unit involves theory and practice and will help learners to develop a basic understanding of how strategic management operates in organisations. Through this, learners will realise that strategic management is dynamic and ongoing.

Learning outcomes

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

LO1 Understand organisational strategic plans

LO2 Understand the strategic effects of an organisational plan

LO3 Be able to develop a strategy to communicate organisational plans

LO4 Be able to evaluate the implications of an organisational plan for an operational area

Version 1.0

Unit content

Evidence requirements

Learners must provide a portfolio of evidence which contains evidence that all the assessment criteria have been met.

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

This unit was developed by Pearson Education Limited and has links to the Management and Leadership national occupational standards (NOS).

Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by the Council for Administration

Functional skills

This unit could contribute towards the functional skills in the following areas:

- English Level 2
- Mathematics Level 2
- ICT Level 2

Learning outcomes

Learning Outcome	Assessment Criteria
LO1 Understand organisational strategic plans	1.1 Explain the processes for developing strategic elements of an organisational plan
	1.2 Assess the strategic elements which affect an organisational plan
	1.3 Evaluate an organisational plan for future direction

Learning Outcome	Assessment Criteria
LO2 Understand the strategic effects of an organisational plan	2.1 Explain how an organisational plan will be implemented
	2.2 Assess the effects of the impact of an organisational plan on stakeholders

Learning Outcome	Assessment Criteria
LO3 Be able to develop a strategy to communicate organisational plans	3.1 Develop a strategy to communicate an organisational plan to key stakeholders

Learning Outcome	Assessment Criteria
LO4 Be able to evaluate the implications of an organisational plan for an operational area	4.1 Create an action plan for implementing planned changes in an operational area
	4.2 Evaluate the effects of change on an operational area

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Version	Issue Date	Changes	Role
1.0	31/01/2023	Rebrand	Regulation Officer

PMD5 Document History

Version	Issue Date	Changes	Role
V4.3	31/01/2023	Formatting and re-branding. No content amendment.	Data Administrator
V5.0	07/03/2023	Formatting and re-branding. No content amendments. Units appraisals completed. All units added.	Qualification Administrator