



Learner
Achievement
Portfolio

Level 4 NVQ Diploma in Management – Complete

Qualification
Accreditation Number:
601/3549/9
Version AIQ006186

Active iQ

Introduction

The Level 4 NVQ Diploma in Management is a qualification that covers the knowledge, skills and competence required for managers who play an integral role in developing and supporting organisational objectives through a wide range of functions.

Typical job titles include:

- Manager
- Head of function
- Area manager

The qualification is primarily aimed at learners who are already employed in one of these roles or similar and have the opportunities to demonstrate their competence in the workplace over time.

GLH:	214	TQT:	530	Credit value:	53
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Active IQ Level 4 NVQ Diploma in Management

Qualification Structure

Learners must achieve a minimum of 53 credits.

Learners must complete all four units in mandatory group A (17 credits), a minimum of 20 credits from optional group B and a maximum of 16 credits from optional group C.

A minimum of 40 credits must be at level 4.

Mandatory units - Group A

Successful achievement of all four mandatory units must be achieved for the full qualification.

Unit		Accreditation number	Level	Credit
1.	Provide leadership and management	L/506/1953	4	5
2.	Develop and implement an operational plan	Y/506/1955	4	5
3.	Develop working relationships with stakeholders	F/506/1982	4	4
4.	Manage personal and professional development	T/506/2952	3	3

Optional units (Group B)

Learners must achieve a minimum of 20 credits

Unit		Accreditation number	Level	Credit
5.	Develop and maintain professional networks	J/506/1949	4	3
6.	Encourage learning and development	M/506/1962	4	3
7.	Initiate and implement operational change	T/506/1980	4	4
8.	Discipline and grievance management	A/506/1981	4	3
9.	Manage a tendering process	L/506/1984	4	4
10.	Manage physical resources	K/506/1989	4	4
11.	Prepare for and support quality audits	K/506/1992	4	3
12.	Conduct quality audits	T/506/1994	4	3
13.	Manage a budget	A/506/1995	4	4
14.	Manage a project	R/506/1999	4	7
15.	Manage business risk	L/506/2004	4	6

16.	Manage knowledge in an organisation	A/506/2032	4	5
17.	Manage redundancy and redeployment	M/506/2044	4	6
18.	Promote equality, diversity and inclusion in the workplace	T/506/1820	3	3
19.	Manage team performance	A/506/1821	3	4
20.	Manage individuals' performance	J/506/1921	3	4
21.	Manage individuals' development in the workplace	L/506/1922	3	3
22.	Chair and lead meetings	Y/506/1924	3	3
23.	Manage conflict within a team	K/506/1927	3	5
24.	Procure products and/or services	M/506/1928	3	5
25.	Implement and maintain business continuity plans and processes	K/506/1930	3	4
26.	Collaborate with other departments	M/506/1931	3	3
27.	Support remote or virtual teams	A/506/1933	3	4
28.	Contribute to the development of a strategic plan	A/506/2046	5	5
29.	Design business processes	D/506/2055	5	5
30.	Develop and manage collaborative relationships with other organisations	T/506/2059	5	5
31.	Optimise the use of technology	F/506/2064	5	6
32.	Manage product and/or service development	Y/506/2068	5	5
33.	Encourage innovation	J/506/2292	3	4
34.	Manage the impact of work activities on the environment	J/506/2907	4	4
35.	Recruitment, selection and induction practice	R/506/2909	4	6


Optional units (Group C)

Learners can achieve a maximum of 16 credits

Unit		Accreditation number	Level	Credit
36.	Manage health and safety in own area of responsibility	D/504/4056	4	5
37.	Contribute to the design and development of an information system	A/506/1950	4	5
38.	Manage information systems	F/506/1951	4	6
39.	Manage events	M/506/1959	4	6
40.	Review the quality of customer service	F/506/2176	4	4
41.	Contribute to the improvement of business performance	D/506/1911	3	6
42.	Negotiate in a business environment	H/506/1912	3	4
43.	Resolve customers' problems	K/506/2169	3	4
44.	Resolve customers' complaints	R/506/2151	3	4
45.	Analyse competitor activity	Y/502/9927	3	3
46.	Developing sales proposals	A/502/8656	4	5
47.	Prioritising information for sales planning	D/502/8651	4	3
48.	Manage customer service operations	M/506/2898	4	7

Mandatory Group A

Unit 1

Title		Provide leadership and management		
Level		4		
Credit		5		
Unit accreditation no.		L/506/1953		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the principles supporting leadership and management	1.1	Analyse how leadership and management theories may be applied		
	1.2	Assess the influence of an organisation's culture on its leadership styles and management practices		
	1.3	Assess the influence of an organisation's structure on its leadership styles and management practices		
	1.4	Analyse how theories of motivation may be applied in the practice of leadership		
	1.5	Evaluate the role of stakeholder engagement in leadership and management		
	1.6	Assess the suitability of a range of leadership styles and management practices to the culture of an organisation		
2. Be able to engage and inspire stakeholders and colleagues	2.1	Display behaviours and attitudes that show a commitment to the achievement of an organisation's goals		
	2.2	Display behaviours and attitudes that show a commitment to the fulfilment of an organisation's vision and the expression of its values		

	<p>2.3 Identify who stakeholders are and the nature of their interest</p> <p>2.4 Take action to ensure that colleagues and other stakeholders understand their role in achievement of organisational objectives</p> <p>2.5 Win the trust and support of colleagues and other key stakeholders through exemplary performance and behaviour</p> <p>2.6 Take action to maintain morale through difficult times</p> <p>2.7 Take action to secure the on-going commitment of colleagues and other key stakeholders</p>	3. Be able to deliver results		3.1 Make planning and resourcing decisions that optimise the available resources, skills and expertise		3.2 Use delegation techniques whilst delivering targets		3.3 Empower individuals to take responsibility for their decisions and actions within agreed parameters		3.4 Adapt plans, priorities and resource allocations to meet changing circumstances and priorities	
Evidence Requirements											
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.											
Simulation											
Simulation is not allowed.											

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 2

Title		Develop and implement an operational plan		
Level		4		
Credit		5		
Unit accreditation no.		Y/506/1955		
Learning Outcomes The learner will:		Initial Evidence Reference		
Assessment Criteria The learner can:		✓		
1. Understand the principles of operational planning	1.1 Evaluate the use of risk analysis techniques in operational planning			
	1.2 Explain the components of an operational plan			
	1.3 Analyse the relationship between strategic and operational plans			
	1.4 Evaluate the use of planning tools and techniques in the operational planning process			
	1.5 Explain how to carry out a cost-benefit analysis			
2. Be able to develop an operational plan	2.1 Identify specific, measurable, achievable, realistic and time-bound (SMART) objectives and key performance indicators (KPIs)			
	2.2 Identify evaluation mechanisms appropriate to the plan			
	2.3 Take action to ensure that plans are consistent with organisational strategy, objectives, values, policies and procedures			
	2.4 Develop proportionate and targeted plans to manage identified risks			
	2.5 Take action to ensure that plans complement and maximise synergy with other business areas			
	2.6 Adhere to organisational policies and procedures, legal and ethical requirements			

3. Be able to implement an operational plan	3.1 Implement plans within agreed budgets and timescales			
	3.2 Communicate the requirements of the plans to those who will be affected			
	3.3 Revise plans in the light of changing circumstances in accordance with strategic objectives and identified risks			
4. Be able to evaluate the effectiveness of an operational plan	4.1 Conduct periodic reviews of the progress and effectiveness of the plans, using information from a range of sources			
	4.2 Report on the effectiveness of operational plans in the appropriate format			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

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Unit 3

Title	Develop working relationships with stakeholders		
Level	4		
Credit	4		
Unit accreditation no.	F/506/1982		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand working relationships with stakeholders	1.1 Analyse stakeholder mapping techniques		
	1.2 Explain how influencing skills and techniques can be used to enhance the relationship with stakeholders		
	1.3 Explain how expectation management and conflict resolution techniques are applied to stakeholder management		
	1.4 Analyse the advantages and limitations of different types of stakeholder consultation		
	1.5 Evaluate the risks and potential consequences of inadequate stakeholder consultation		
2. Be able to determine the scope for collaboration with stakeholders	2.1 Identify the stakeholders with whom relationships should be developed		
	2.2 Explain the roles, responsibilities, interests and concerns of stakeholders		
	2.3 Evaluate business areas that would benefit from collaboration with stakeholders		
	2.4 Evaluate the scope for and limitations of collaborating with different types of stakeholder		

3. Be able to develop productive working relationships with stakeholders	3.1 Create a climate of mutual trust and respect by behaving openly and honestly			
	3.2 Take account of the advice provided by stakeholders			
	3.3 Minimise the potential for friction and conflict amongst stakeholders			
4. Be able to evaluate relationships with stakeholders	4.1 Monitor relationships and developments with stakeholders			
	4.2 Address changes that may have an effect on stakeholder relationships			
	4.3 Recommend improvements based on analyses of the effectiveness of stakeholder relationships			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

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Unit 4

Title		Manage personal and professional development		
Level		3		
Credit		3		
Unit accreditation no.		T/506/2952		
Learning Outcomes		Initial Evidence Reference		
The learner will:		Initial Evidence Reference		
1. Be able to identify personal and professional development requirements	1.1 Compare sources of information on professional development trends and their validity			
	1.2 Identify trends and developments that influence the need for professional development			
	1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation			
	2.1 Evaluate the benefits of personal and professional development			
	2.2 Explain the basis on which types of development actions are selected			
	2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis			
2. Be able to fulfil a personal and professional development plan	2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives			
	2.5 Execute the plan within the agreed budget and timescale			
	2.6 Take advantage of development opportunities made available by professional networks or professional bodies			

3. Be able to maintain the relevance of a personal and professional development plan	3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives			
	3.2 Obtain feedback on performance from a range of valid sources			
	3.3 Review progress toward personal and professional objectives			
	3.4 Amend the personal and professional development plan in the light of feedback received from others			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

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Optional Units - Group B

Unit 5

Title	Develop and maintain professional networks		
Level	4		
Credit	3		
Unit accreditation no.	J/506/1949		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the principles of effective networking	1.1 Describe the interpersonal skills needed for effective networking 1.2 Explain the basis on which to choose networks to be developed 1.3 Evaluate the role of shared agendas and conflict management in relationship-building 1.4 Evaluate the role of the internet in business networking 1.5 Assess the importance of following up leads and actions 1.6 Analyse ethical issues relating to networking activities		
2. Be able to identify professional networks for development	2.1 Identify potential networks for professional development from an analysis of their benefits compared with individual needs and aspirations 2.2 Shortlist networks for development against defined criteria 2.3 Assess the benefits and limitations of joining and maintaining selected network(s)		
3. Be able to maintain professional networks	3.1 Identify the potential for mutual benefit with network members 3.2 Promote their own skills, knowledge and competence to network members 3.3 Provide information, services or support to network members where the potential for mutual benefit has been identified		

	<p>3.4 Establish the boundaries of confidentiality</p> <p>3.5 Agree guidelines for the exchange of information and resources</p> <p>3.6 Take action to ensure that participation in networks reflects current and defined future aspirations and needs</p> <p>3.7 Make introductions to people with common or complementary interest to and within networks</p>				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

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Unit 6

Title		Encourage learning and development		
Level		4		
Credit		3		
Unit accreditation no.		M/506/1962		
Learning Outcomes The learner will:		Initial Evidence Reference		
1. Understand the principles of learning and development		✓		
	1.1 Assess the role of continuous professional development (CPD) in identifying and meeting individuals' learning and development for current and future business needs			
	1.2 Analyse the advantages and limitations of different learning and development methods			
	1.3 Explain how to identify individuals' learning and development needs			
	1.4 Evaluate the role of self-reflection in learning and development			
2. Be able to support individuals' learning and development				
	2.1 Promote the benefits of learning to people in own area of responsibility			
	2.2 Support individuals in identifying their current and likely future learning and development needs from a range of information sources			
	2.3 Agree with individuals the learning activities to be undertaken, ensuring they are within agreed budgets and consistent with business needs			
	2.4 Summarise agreed learning objectives, learning activities, review mechanisms and success criteria in a personal development plan			
	2.5 Create an environment that encourages and promotes learning and development			
	2.6 Provide opportunities for individuals to apply their developing competence in the workplace			

3. Be able to evaluate individuals' learning and development	3.1 Analyse information from a range of sources on individuals' performance and development			
	3.2 Evaluate the effectiveness of different learning and development methods			
	3.3 Agree revisions to personal development plans in the light of feedback			
	Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.			
Simulation Simulation is not allowed.				

Assessor feedback

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Unit 7

Title	Initiate and implement operational change		
Level	4		
Credit	4		
Unit accreditation no.	T/506/1980		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the implementation of operational change	1.1 Explain sources of information indicating the need for change		
	1.2 Analyse the advantages and limitations of different project and change management techniques		
	1.3 Analyse the characteristics, strengths and weaknesses of evaluation techniques used in change management		
2. Be able to plan for operational change	2.1 Develop an operational plan that includes specific, measurable, achievable, realistic and time-bound (SMART) objectives and resources		
	2.2 Take action to ensure that colleagues are briefed on their roles, responsibilities and change objectives		
	2.3 Provide colleagues with the support needed to implement operational change		
3. Be able to manage operational change	3.1 Implement the change plan within the agreed timescale using available resources		
	3.2 Assess the significance of deviations from the change plan		

	3.3 Address interdependency issues and tensions that affect the achievement of change objectives			
	3.4 Assess the value and risks of unintended outcomes from operational change			
	3.5 Inform stakeholders of any unforeseen obstacles or problems and the actions that have been taken			
4. Be able to evaluate the effectiveness of operational change	4.1 Evaluate the effectiveness of operational change			
	4.2 Identify areas for improvement, justifying conclusions and recommendations with evidence			
	4.3 Communicate to stakeholders the lessons learned from the change			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation may be used for assessment criteria 3.5 (Inform stakeholders of any unforeseen obstacles or problems and the actions that have been taken) if no naturally occurring evidence is available.</p>				
<p>Supplementary evidence Supplementary evidence such as questioning may be used for assessment criteria 3.5 (Inform stakeholders of any unforeseen obstacles or problems and the actions that have been taken) if no naturally occurring evidence is available.</p>				

Assessor feedback

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Unit 8

Title		Discipline and grievance management		
Level		4		
Credit		3		
Unit accreditation no.		A/506/1981		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the principles supporting the management of discipline and grievance cases	1.1 Explain the difference between a discipline case and a grievance case and the implications for their management			
	1.2 Explain sources of advice and expertise on discipline and grievance			
	1.3 Explain the legal obligations of employers and the rights of employees in relation to discipline and grievance cases			
	1.4 Explain organisational procedures for the management of discipline and grievance cases			
	1.5 Explain the communication techniques to be used in the management of discipline and grievance cases			
	1.6 Explain the types of behaviours that are likely to result in disciplinary proceedings			
	1.7 Explain the types of actions that are likely to lead to a grievance			
	1.8 Explain how to carry out investigations into discipline and grievance cases			
	1.9 Analyse the effect of well managed and poorly managed discipline and grievance cases			
	1.10 Explain how the outcomes of discipline and grievance cases can be managed			

2. Be able to manage a disciplinary case	<p>2.1 Inform an individual that they are subject to disciplinary proceedings within agreed timescales</p> <p>2.2 Explain to an individual the reasons why they are subject to disciplinary proceedings</p> <p>2.3 Provide evidence that supports the case for disciplinary proceedings</p> <p>2.4 Develop a case to support an individual who is subject to disciplinary proceedings</p> <p>2.5 Keep detailed and accurate records of agreements, actions and events for disciplinary cases</p> <p>2.6 Adhere to organisational policies and procedures, legal and ethical requirements when managing a disciplinary case</p>			
3. Be able to manage a grievance	<p>3.1 Identify the nature of a grievance</p> <p>3.2 Investigate the seriousness and potential implications of a grievance</p> <p>3.3 Adhere to organisational procedures when managing a grievance</p> <p>3.4 Evaluate the effectiveness of how a grievance has been managed</p> <p>3.5 Agree measures to prevent future reoccurrences of grievances</p>			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed for this unit except as detailed below.				
Simulation may be used for all assessment criteria in learning outcomes 2 and 3 if no naturally occurring evidence is available.				
Supplementary evidence				
Supplementary evidence such as questioning may be used for all assessment criteria in learning outcomes 2 and 3 if no naturally occurring evidence is available.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 9

Title		Manage a tendering process		
Level		4		
Credit		4		
Unit accreditation no.		L/506/1984		
Learning Outcomes The learner will:		Assessment Criteria The learner can:		
1. Be able to develop a tender specification		Initial		
		✓		
		Evidence Reference		
2. Be able to manage a tendering exercise		1.1 Explain the roles and inputs of those who need to be involved in the tender process		
		1.2 Identify essential and desirable business needs and their implications which may be included within the tender		
		1.3 Address all aspects of the specification including post-contractual requirements		
		1.4 Allocate priorities within the tender specification in accordance with business needs		
		1.5 Establish criteria and ranking systems to evaluate tenders in accordance with organisational procurement policies		
		2.1 Assess the appropriateness of different media to attract potential suppliers		
		2.2 Use media to attract potential suppliers that are appropriate to the nature of the contract		
		2.3 Specify tender application procedures, arrangements and timetable		

	2.4 Invite suppliers to apply for the tender				
	2.5 Sift out those that do not meet the agreed criteria				
	2.6 Confirm that the track records of shortlisted suppliers demonstrate the required technical capability				
3. Be able to negotiate the award of contracts	3.1 Explain the provisions of contract law that affect the negotiation				
	3.2 Devise a negotiating strategy that is appropriate to the contract and supplier				
	3.3 Award contracts that best meet business needs, are realistic and meet the specification				
	3.4 Complete the tendering exercise in accordance with organisational standards				
	3.5 Analyse the implications of procurement decisions for the organisation, suppliers and potential suppliers				
	3.6 Communicate outcomes of the tendering exercise to stakeholders				
	3.7 Adhere to organisational policies and procedures, legal and ethical requirements when awarding contracts				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p> <p>Simulation Simulation is not allowed.</p>					

Assessor feedback

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Unit 10

Title		Manage physical resources		
Level		4		
Credit		4		
Unit accreditation no.		K/506/1989		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Be able to identify the need for physical resources	1.1	Identify resource requirements from analyses of organisational needs		
	1.2	Evaluate alternative options for obtaining physical resources		
	1.3	Evaluate the impact on the organisation of introducing physical resources		
	1.4	Identify the optimum option that meets operational requirements for physical resources		
	2.1	Develop a business case for physical resources that is supported by evidence, cost estimates, contingency arrangements and an analysis of likely benefits		
2. Be able to obtain physical resources	2.2	Obtain authorisation and financial commitment for the required expenditure		
	2.3	Negotiate best value from contracts in accordance with organisational standards and procedures		
	2.4	Adhere to organisational policies and procedures, legal and ethical requirements when obtaining physical resources		
	2.5	Check that the physical resources received match those ordered		

3. Be able to manage the use of physical resources	3.1 Take action to ensure physical resources are used in accordance with manufacturers' instructions			
	3.2 Evaluate the efficiency of physical resources against agreed criteria			
	3.3 Recommend improvements to the use of physical resources and associated working practices			
	3.4 Analyse the benefits of effective equipment in the conservation of energy and the environment			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 11

Title		Prepare for and support quality audits		
Level		4		
Credit		3		
Unit accreditation no.		K/506/1992		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the principles underpinning the management of quality	1.1	Analyse the principles of quality management		
	1.2	Analyse the purpose and requirements of a range of quality standards		
	1.3	Analyse the advantages and limitations of a range of quality techniques		
	1.4	Assess how the management of quality contributes to the achievement of organisational objectives		
	2.1	Establish the quality requirements applicable to the work being audited		
2. Be able to prepare for quality audits	2.2	Confirm that documentation is complete		
	2.3	Confirm that any previously agreed actions have been implemented		
	2.4	Make available information requested in advance by auditors		
	3.1	Provide access to information on request within scope of the audit		
3. Be able to support quality audits	3.2	Agree actions and timescales with auditors that will remedy non-conformance or non-compliance		
	3.3	Identify instances where business processes, quality standards and/or procedures could be improved		
	3.4	Develop a quality improvement plan that addresses the issues raised		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

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Unit 12

Title	Conduct quality audits		
Level	4		
Credit	3		
Unit accreditation no.	T/506/1994		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the principles underpinning the management of quality	1.1 Analyse the principles of quality management		
	1.2 Analyse the purpose and requirements of a range of quality standards		
	1.3 Analyse the advantages and limitations of a range of quality techniques		
	1.4 Assess how the management of quality contributes to the achievement of organisational objectives		
2. Be able to prepare to carry out quality audits	2.1 Establish the quality requirements applicable to the work being audited		
	2.2 Develop a plan for a quality audit		
	2.3 Prepare the documentation needed to undertake a quality audit		
	2.4 Specify data requirements to those who will support the audit		
3. Be able to conduct quality audits	3.1 Confirm that any previously agreed actions have been implemented		
	3.2 Analyse information against agreed quality criteria		
	3.3 Identify instances where business processes, quality standards and/or procedures could be improved		
	3.4 Agree actions and timescales that will remedy non-conformance or non-compliance		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

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Unit 13

Title		Manage a budget		
Level		4		
Credit		4		
Unit accreditation no.		A/506/1995		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand how to identify financial requirements	1.1	Explain how to calculate the estimated costs of activities, resources and overheads needed to achieve objectives		
	1.2	Analyse the components of a business case to meet organisational requirements		
	1.3	Analyse the factors to be taken into account to secure the support of stakeholders		
	1.4	Describe the business planning and budget-setting cycle		
	2.1	Explain the purposes of budget-setting		
2. Understand how to set budgets	2.2	Analyse the information needed to enable realistic budgets to be set.		
	2.3	Explain how to address contingencies		
	2.4	Explain organisational policies and procedures on budget-setting		
3. Be able to manage a budget	3.1	Use the budget to control performance and expenditure		
	3.2	Identify the cause of variations from budget		
	3.3	Explain the actions to be taken to address variations from budget		
	3.4	Propose realistic revisions to budget, supporting recommendations with evidence		

	3.5 Provide budget-related reports and information within agreed timescales			
	3.6 Explain the actions to be taken in the event of suspected instances of fraud or malpractice			
4. Be able to evaluate the use of a budget	4.1 Identify successes and areas for improvement in budget management			
	4.2 Make recommendations to improve future budget setting and management			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 14

Title	Manage a project		
Level	4		
Credit	7		
Unit accreditation no.	R/506/1999		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the management of a project	1.1 Explain how to carry out a cost-benefit analysis for a project		
	1.2 Evaluate the use of risk analysis techniques		
	1.3 Evaluate project planning and management tools and techniques		
	1.4 Evaluate the impact of changes to project scope, schedule, finance, risk, quality and resources		
	1.5 Analyse the requirements of project governance arrangements		
2. Be able to plan a project	2.1 Analyse how a project fits with an organisation's overall vision, objectives, plans and programmes of work		
	2.2 Agree the objectives and scope of proposed projects with stakeholders		
	2.3 Assess the interdependencies and potential risks within a project		
	2.4 Develop a project plan with specific, measurable, achievable, realistic and time-bound (SMART) objectives, key performance indicators (KPIs) and evaluations mechanisms appropriate to the plan		
	2.5 Develop proportionate and targeted plans to manage identified risks and contingencies		
	2.6 Apply project lifecycle approaches to the progress of a project		

3. Be able to manage a project	3.1	Allocate resources in accordance with the project plan				
	3.2	Brief project team members on their roles and responsibilities				
	3.3	Implement plans within agreed budgets and timescales				
	3.4	Communicate the requirements of the plans to those who will be affected				
	3.5	Revise plans in the light of changing circumstances in accordance with project objectives and identified risks				
	3.6	Keep stakeholders up to date with developments and problems				
	3.7	Complete close-out actions in accordance with project plans				
	3.8	Adhere to organisational policies and procedures, legal and ethical requirements when managing a project				
	4. Be able to evaluate the effectiveness of a project	4.1	Conduct periodic reviews of the progress and effectiveness of a project using information from a range of sources			
		4.2	Evaluate the effectiveness of capturing and managing project-related knowledge			
4.3		Report on the effectiveness of plans				
Evidence Requirements						
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.						
Simulation						
Simulation is not allowed.						

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 15

Title		Manage business risk		
Level		4		
Credit		6		
Unit accreditation no.		L/506/2004		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the management of business risk	1.1	Explain what is meant by business risk		
	1.2	Analyse business risk identification theories and models		
	1.3	Explain measures and techniques to mitigate business risk		
	1.4	Explain their own level of authority in managing risk		
	2.1	Monitor work in line with organisational risk procedures		
2. Be able to address business risk	2.2	Identify potential risks using agreed risk criteria		
	2.3	Assess identified risks, their potential consequences and the probability of them happening		
	2.4	Communicate to stakeholders the likelihood of the risk occurring and its potential consequences		
3. Be able to mitigate business risk	2.5	Explain organisational business risk management policies		
	3.1	Develop risk management plans and processes that are proportionate to the risk and the available resources		
	3.2	Implement risk management plans in accordance with organisational requirements		

	3.3 Monitor on-going risk-related developments and amend plans in the light of changing circumstances			
	3.4 Keep stakeholders informed of any developments and their possible consequences			
	3.5 Evaluate the effectiveness of actions taken, identifying possible future improvements			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 16

Title	Manage knowledge in an organisation		
Level	4		
Credit	5		
Unit accreditation no.	A/506/2032		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the principles of knowledge management	1.1 Explain the concept, scope and importance of knowledge management		
	1.2 Explain the concept of intellectual property		
	1.3 Identify the business drivers that lead to effective knowledge management		
	1.4 Explain the risks associated with knowledge management and their potential implications		
	1.5 Explain the importance of engaging others and communicating knowledge management issues and activities		
	1.6 Explain best practice principles and techniques for effective knowledge management		
	1.7 Describe strategies to manage tacit and explicit knowledge		
2. Be able to identify knowledge to be managed within an organisation	2.1 Identify the criteria against which knowledge will be managed		
	2.2 Engage colleagues in identifying the knowledge to be managed		

3. Be able to manage knowledge within an organisation	3.1 Implement actions in accordance with the knowledge management plan			
	3.2 Adhere to security processes for the collection, storage and retrieval of knowledge			
	3.3 Evaluate the extent to which current knowledge management systems and processes are fit for purpose			
	3.4 Recommend improvements to processes and systems to manage knowledge			
	3.5 Assess the likely impact and implications of the loss of knowledge			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 17

Title		Manage redundancy and redeployment		
Level		4		
Credit		6		
Unit accreditation no.		M/506/2044		
Learning Outcomes		Initial Evidence Reference		
The learner will:		Initial Evidence Reference		
1. Understand the management of redundancy	1.1 Explain the legal requirements that relate to the management of redundancy			
	1.2 Explain the conditions required for a redundancy and their implications			
	1.3 Explain possible ways of avoiding redundancies			
	1.4 Explain the factors involved in identifying the pool for redundancy selection			
	1.5 Explain the factors involved in developing an appeals process			
	1.6 Explain the process for planning and managing a redundancy			
	1.7 Evaluate the implications of voluntary and compulsory redundancy on individuals			
	1.8 Evaluate the implications of voluntary and compulsory redundancy for organisations			
	1.9 Evaluate the type of information required by staff who are retained			
	1.10 Evaluate the type of information required by staff who are made redundant			
	1.11 Assess the role of outplacement in redundancy			

<p>2. Understand the principles of redeployment</p>	<p>2.1 Explain the concept of redeployment</p> <p>2.2 Explain the legal requirements that relate to the management of redeployment</p> <p>2.3 Explain the process for planning and managing a redeployment</p> <p>2.4 Evaluate the type of information required by staff who are retained</p> <p>2.5 Evaluate the type of information required by staff who are redeployed</p> <p>2.6 Evaluate the benefits and limitations to an organisation of redeployment</p> <p>2.7 Assess the role of project management techniques in the management of redeployment</p>			
<p>3. Be able to manage a redundancy</p>	<p>3.1 Evaluate the available options for avoiding a redundancy and their implications</p> <p>3.2 Develop a redundancy plan and timetable that addresses redundancy objectives</p> <p>3.3 Take action to ensure that redundancy payments are calculated accurately</p> <p>3.4 Use an appropriate method for communicating the outcome of a redundancy decision</p> <p>3.5 Make agreed support services available to those who have been made redundant</p>			

4. Be able to manage the redeployment of staff	4.1 Explain to redeployees the reasons, purpose and benefits of redeployment			
	4.2 Develop a redeployment plan that addresses agreed objectives			
	4.3 Use an appropriate method for communicating about redeployment			
	4.4 Make agreed support services available to those being redeployed			
	4.5 Adhere to organisational policies and procedures, legal and ethical requirements for the redeployment of staff			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation may be used for all assessment criteria in learning outcomes 3 and 4 if no naturally occurring evidence is available.				
Supplementary evidence				
Supplementary evidence such as questioning may be used for all assessment criteria in learning outcomes 3 and 4 if no naturally occurring evidence is available.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 18

Title		Promote equality, diversity and inclusion in the workplace		
Level		3		
Credit		3		
Unit accreditation no.		T/506/1820		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the organisational aspects of equality, diversity and inclusion in the workplace	1.1	Explain the difference between equality, diversity and inclusion		
	1.2	Explain the impact of equality, diversity and inclusion across aspects of organisational policy		
	1.3	Explain the potential consequences of breaches of equality legislation		
	1.4	Describe nominated responsibilities within an organisation for equality, diversity and inclusion		
2. Understand the personal aspects of equality, diversity and inclusion in the workplace	2.1	Explain the different forms of discrimination and harassment		
	2.2	Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace		
	2.3	Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace		
3. Be able to support equality, diversity and inclusion in the workplace	3.1	Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace		
	3.2	Identify potential issues relating to equality, diversity and inclusion in the workplace		
	3.3	Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 19

Title	Manage team performance		
Level	3		
Credit	4		
Unit accreditation no.	A/506/1821		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the management of team performance	1.1 Explain the use of benchmarks in managing performance		
	1.2 Explain a range of quality management techniques to manage team performance		
	1.3 Describe constraints on the ability to amend priorities and plans		
2. Be able to allocate and assure the quality of work	2.1 Identify the strengths, competences and expertise of team members		
	2.2 Allocate work on the basis of the strengths, competences and expertise of team members		
	2.3 Identify areas for improvement in team members' performance outputs and standards		
	2.4 Amend priorities and plans to take account of changing circumstances		
	2.5 Recommend changes to systems and processes to improve the quality of work		

3. Be able to manage communications within a team	3.1 Explain to team members the lines of communication and authority levels			
	3.2 Communicate individual and team objectives, responsibilities and priorities			
	3.3 Use communication methods that are appropriate to the topics, audience and timescales			
	3.4 Provide support to team members when they need it			
	3.5 Agree with team members a process for providing feedback on work progress and any issues arising			
	3.6 Review the effectiveness of team communications and make improvements			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 20

Title	Manage individuals' performance		
Level	3		
Credit	4		
Unit accreditation no.	J/506/1921		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the management of underperformance in the workplace	1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance		
	1.2 Explain how to identify causes of underperformance		
	1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively		
	1.4 Explain how to address issues that hamper individuals' performance		
	1.5 Explain how to agree a course of action to address underperformance		
2. Be able to manage individuals' performance in the workplace	2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives		
	2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs		
	2.3 Apply motivation techniques to maintain morale		
	2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards		
	2.5 Monitor individuals' progress towards objectives in accordance with agreed plans		

	2.6 Recognise individuals' achievement of targets and quality standards				
	2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 21

Title		Manage individuals' development in the workplace		
Level		3		
Credit		3		
Unit accreditation no.		L/506/1922		
Learning Outcomes The learner will:		➤	Initial	Evidence Reference
1. Be able to carry out performance appraisals	1.1 Explain the purpose of performance reviews and appraisals			
	1.2 Explain techniques to prepare for and carry out appraisals			
	1.3 Provide a private environment in which to carry out appraisals			
	1.4 Carry out performance reviews and appraisals in accordance with organisational policies and procedures			
	1.5 Provide clear, specific and evidence-based feedback sensitively			
	1.6 Agree future actions that are consistent with appraisal findings and identified development needs			
2. Be able to support the learning and development of individual team members	2.1 Describe training techniques that can be applied in the workplace			
	2.2 Analyse the advantages and disadvantages of learning and development interventions and methods			
	2.3 Explain organisational learning and development policies and resource availability			

	2.4 Review individuals' learning and development needs at regular intervals				
	2.5 Suggest learning and development opportunities and interventions that are likely to meet individual and business needs				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 22

Title		Chair and lead meetings		
Level		3		
Credit		3		
Unit accreditation no.		Y/506/1924		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Be able to prepare to lead meetings	1.1	Identify the type, purpose, objectives, and background to a meeting		
	1.2	Identify those individuals expected, and those required to attend a meeting		
	1.3	Prepare for any formal procedures that apply to a meeting		
	1.4	Describe ways of minimising likely problems in a meeting		
	1.5	Take action to ensure that meeting documentation is prepared correctly and distributed to the agreed people within the agreed timescale		
2. Be able to chair and lead meetings	2.1	Follow business conventions in the conduct of a meeting		
	2.2	Facilitate meetings so that everyone is involved and the optimum possible consensus is achieved		
	2.3	Manage the agenda within the timescale of the meeting		
	2.4	Summarise the agreed actions, allocated responsibilities, timescales and any future arrangements		
3. Be able to deal with post-meeting matters	3.1	Take action to ensure that accurate records of a meeting are produced and distributed in the agreed format and timescale		
	3.2	Take action to ensure that post-meeting actions are completed		
	3.3	Evaluate the effectiveness of a meeting and identify points for future improvement		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 23

Title		Manage conflict within a team		
Level		3		
Credit		5		
Unit accreditation no.		K/506/1927		
Learning Outcomes The learner will:		Initial Evidence Reference		
<p>1. Understand the principles of conflict management</p> <p>2. Be able to reduce the potential for conflict within a team</p>		➤		
		<p>Assessment Criteria The learner can:</p> <p>1.1 Evaluate the suitability of different methods of conflict management in different situations</p> <p>1.2 Describe the personal skills needed to deal with conflict between other people</p> <p>1.3 Analyse the potential consequences of unresolved conflict within a team</p> <p>1.4 Explain the role of external arbitration and conciliation in conflict resolution</p> <p>2.1 Communicate to team members their roles, responsibilities, objectives and expected standards of behaviour</p> <p>2.2 Explain to team members the constraints under which other colleagues work</p> <p>2.3 Review systems, processes, situations and structures that are likely to give rise to conflict in line with organisational procedures</p> <p>2.4 Take action to minimise the potential for conflict within the limits of their own authority</p> <p>2.5 Explain how team members' personalities and cultural backgrounds may give rise to conflict</p>		

3. Be able to deal with conflict within a team	3.1 Assess the seriousness of conflict and its potential impact			
	3.2 Treat everyone involved with impartiality and sensitivity			
	3.3 Decide a course of action that offers optimum benefits			
	3.4 Explain the importance of engaging team members' support for the agreed actions			
	3.5 Communicate the actions to be taken to those who may be affected by it			
	3.6 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with conflict within a team			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation may be used for all learning outcomes and assessment criteria if no naturally occurring evidence is available				
Supplementary evidence				
Supplementary evidence such as questioning may be used for all learning outcomes and assessment criteria if no naturally occurring evidence is available				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 24

Title	Procure products and/or services		
Level	3		
Credit	5		
Unit accreditation no.	M/506/1928		
Learning Outcomes The learner will:	✓	Initial	Evidence Reference
1. Be able to identify procurement requirements	1.1 Explain current and likely future procurement requirements		
	1.2 Decide whether the purchase of products and/or services offers the organisation best value		
	1.3 Evaluate ethical and sustainability considerations relating to procurement		
	1.4 Justify the decision to buy products and/or services with evidence of an analysis of risk, costs and benefits		
2. Be able to select suppliers	2.1 Explain the factors to be taken into account in selecting suppliers		
	2.2 Explain organisational procurement policies, procedures and standards		
	2.3 Explain the effect of supplier choice on the supply chain		
	2.4 Use appropriate media to publicise procurement requirements		
	2.5 Confirm the capability and track record of suppliers and their products and/or services		
	2.6 Select suppliers that meet the procurement specification		

3. Be able to buy products and/or services	3.1 Explain the action to be taken in the event of problems arising			
	3.2 Agree contract terms that are mutually acceptable within their own scope of authority			
	3.3 Record agreements made, stating the specification, contract terms and any post-contract requirements			
	3.4 Adhere to organisational policies and procedures, legal and ethical requirements			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 25

Title	Implement and maintain business continuity plans and processes		
Level	3		
Credit	4		
Unit accreditation no.	K/506/1930		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Be able to plan for the implementation of business continuity plans and processes	1.1 Describe the components of a business continuity plan		
	1.2 Explain the uses of a business continuity plan		
	1.3 Explain the features of different business continuity planning models		
	1.4 Explain the potential consequences of inadequate business continuity plans and processes		
	1.5 Confirm the required aim, scope and objectives of business continuity plans		
	1.6 Engage stakeholders in developing business continuity plans and processes		
	1.7 Identify business-critical products and/or services and the activities and resources that support them		

2. Be able to implement business continuity plans and processes	2.1 Develop a framework for business continuity management					
3. Be able to maintain the fitness for purpose of on-going business continuity plans and processes	2.2 Recommend resources that are proportionate to the potential impact of business disruption					
	2.3 Communicate the importance and requirements of business continuity plans and processes to stakeholders					
	2.4 Meet their own objectives within the plan					
3. Be able to maintain the fitness for purpose of on-going business continuity plans and processes	3.1 Provide training for staff who may be affected					
	3.2 Validate and test the strength of business continuity plans and processes					
	3.3 Update plans and processes in the light of feedback from business continuity exercises and other sources of information					
Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.						
Simulation Simulation is not allowed.						

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 26

Title		Collaborate with other departments		
Level		3		
Credit		3		
Unit accreditation no.		M/506/1931		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand how to collaborate with other departments	1.1	Explain the need for collaborating with other departments		
	1.2	Explain the nature of the interaction between their own team and other departments		
	1.3	Explain the features of effective collaboration		
	1.4	Explain the potential implications of ineffective collaboration with other departments		
	1.5	Explain the factors relating to knowledge management that should be considered when collaborating with other departments		
2. Be able to identify opportunities for collaboration with other departments	2.1	Analyse the advantages and disadvantages of collaborating with other departments		
	2.2	Identify with which departments collaborative relationships should be built		
	2.3	Identify the scope for and limitations of possible collaboration		
3. Be able to collaborate with other departments	3.1	Agree Service Level Agreements (SLAs), objectives and priorities of collaborative arrangements		
	3.2	Work with other departments in a way that contributes to the achievement of organisational objectives		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 27

Title	Support remote or virtual teams		
Level	3		
Credit	4		
Unit accreditation no.	A/506/1933		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Be able to assess the support needed by remote or virtual teams	1.1 Identify the resource requirements for providing communication tools and processes for remote or virtual working		
	1.2 Specify effective tools and processes that are capable of supporting remote or virtual teams		
	1.3 Identify processes and systems that will enable people to connect to information and knowledge remotely and securely		
	1.4 Plan how to assure the safety of staff in remote teams		
2. Be able to support remote or virtual teams	2.1 Provide guidelines, training, information and coaching to support remote or virtual teams		
	2.2 Identify areas for improvement from monitoring processes and information		
	2.3 Facilitate interactive collaboration amongst stakeholders		
	2.4 Take action to ensure that team members adhere to regulatory, professional and commercial requirements		
	2.5 Take action to ensure that data security and confidentiality issues arising from remote or virtual working are addressed		
	2.6 Take action to ensure that records management issues arising from remote or virtual working are addressed		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 28

Title	Contribute to the development of a strategic plan		
Level	5		
Credit	5		
Unit accreditation no.	A/506/2046		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the principles of strategic planning	1.1 Evaluate a range of strategic planning models		
	1.2 Evaluate the advantages and limitations of a range of analytical techniques		
	1.3 Analyse a range of perspectives of and approaches to business strategy		
2. Be able to analyse the factors affecting the development of strategic plans	2.1 Evaluate political, economic, social, technological, legal and ethical factors affecting the development of strategic plans		
	2.2 Evaluate the market factors that may influence strategic planning decisions		
	2.3 Evaluate the application of scanning tools to strategy development		
3. Be able to make a contribution to a strategic plan	3.1 Analyse the relationship between strategic intentions, strategic choice and strategy formulation		
	3.2 Make viable contributions that are consistent with strategic objectives and resource constraints		
	3.3 Evaluate the impact of a proposed strategy on a business		
Evidence Requirements	Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.		
Simulation	Simulation is not allowed.		

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 29

Title	Design business processes		
Level	5		
Credit	5		
Unit accreditation no.	D/506/2055		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand techniques and tools that support the design of business processes	1.1 Analyse the principles of business change and business process re-engineering		
	1.2 Evaluate the concept and application of workflow patterns and usability testing		
	1.3 Evaluate a range of modelling tools		
	1.4 Analyse the factors to be taken into account when evaluating the effectiveness of business processes		
2. Be able to develop business processes	2.1 Evaluate the scope for business process improvement and constraints		
	2.2 Generate ideas that meet defined business needs		
	2.3 Test a proposed process through a modelling exercise		
	2.4 Evaluate the feasibility and viability of a proposed process against agreed criteria		
	2.5 Establish the degree of overlap between a proposed process and existing processes and systems		
	2.6 Resolve tensions between existing and proposed systems and processes		
	2.7 Adhere to organisational policies and procedures, legal and ethical requirements when developing business processes		

3. Be able to evaluate the effectiveness of business processes	3.1 Analyse valid information using techniques that are appropriate to the process being evaluated			
	3.2 Assess the cost and benefit of a business process to the organisation			
	3.3 Justify recommendations for the rejection, adoption or enhancements to processes with evidence			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 30

Title		Develop and manage collaborative relationships with other organisations		
Level		5		
Credit		5		
Unit accreditation no.		T/506/2059		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the principles of effective collaboration with other organisations	1.1 Assess the nature of potential stakeholders' interest and need			
	1.2 Evaluate the strengths and weaknesses of stakeholder mapping techniques			
	1.3 Assess the value of a range of analytical techniques and alliance modelling			
	1.4 Evaluate the implications of collaborative relationships for risk and knowledge management			
	1.5 Evaluate the implications of collaborative relationships for the supply chain and sustainability of future working arrangements			
	1.6 Evaluate the components, use and likely effects of invoking an exit strategy			
2. Be able to identify external collaborative relationships to be developed	2.1 Identify potential organisations that are likely to complement or enhance the work or reputation of the organisations involved			
	2.2 Analyse the potential synergies and scope for collaboration likely to benefit the organisations involved			
	2.3 Balance the benefits of collaboration against the cost requirements and any potentially adverse aspects			
	2.4 Justify decisions and recommendations with evidence			

3. Be able to collaborate with other organisations	3.1 Agree mutually acceptable terms of reference				
	3.2 Develop a viable stakeholder engagement plan that is consistent with organisational strategy, objectives and values				
	3.3 Develop arrangements to manage relationships that will realise the benefits of collaboration				
	3.4 Collaborate within agreed terms of reference in a way that enhances the reputation of the organisation and fosters productive working relationships				
	3.5 Evaluate the effectiveness of on-going collaborative relationships				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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3. Be able to optimise the use of technological solutions	<p>3.1 Specify technological requirements and priorities including the input of others in accordance with organisational technology strategy</p> <p>3.2 Take action to ensure the compatibility of technological plans and systems with other systems, processes and plans</p> <p>3.3 Recommend technological solutions that meet the specified objectives</p>			
4. Be able to manage the use of technology	<p>4.1 Develop procedures that address all aspects of the technology and their implications</p> <p>4.2 Take action to ensure that everyone using the technology is adequately trained and equipped</p> <p>4.3 Promote the benefits of technology</p> <p>4.4 Use monitoring techniques that are appropriate to the nature of the work carried out and the system</p> <p>4.5 Take prompt corrective action in the event of problems arising</p>			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation may be used for assessment criteria 4.5 (Take prompt corrective action in the event of problems arising) if no naturally occurring evidence is available.				
Supplementary evidence				
Supplementary evidence such as questioning may be used for assessment criteria 4.5 (Take prompt corrective action in the event of problems arising) if no naturally occurring evidence is available.				

3. Be able to manage the development of new or improved products and/or services	3.1 Take action to ensure that proposals are consistent with organisational strategy, objectives and values			
	3.2 Assess the costs of developing new or improved products and/or services			
	3.3 Assess the viability of products and/or services by carrying out viability tests			
	3.4 Evaluate the degree of success of new or improved products and/or services			
Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation Simulation is not allowed.				

Unit 33

Title		Encourage innovation		
Level		3		
Credit		4		
Unit accreditation no.		J/506/2292		
Learning Outcomes The learner will:		➤	Initial	Evidence Reference
1. Be able to identify opportunities for innovation	1.1	Analyse the advantages and disadvantages of techniques used to generate ideas		
	1.2	Explain how innovation benefits an organisation		
	1.3	Explain the constraints on their own ability to make changes		
	1.4	Agree with stakeholders terms of reference and criteria for evaluating potential innovation and improvement		
	1.5	Engage team members in finding opportunities to innovate and suggest improvements		
	1.6	Monitor performance, products and/or services and developments in areas that may benefit from innovation		
	1.7	Analyse valid information to identify opportunities for innovation and improvement		
2. Be able to generate and test ideas for innovation and improvement	2.1	Generate ideas for innovation or improvement that meet the agreed criteria		
	2.2	Test selected ideas that meet viability criteria		
	2.3	Evaluate the fitness for purpose and value of the selected ideas		
	2.4	Assess potential innovations and improvements against the agreed evaluation criteria		

3. Be able to implement innovative ideas and improvements	3.1 Explain the risks of implementing innovative ideas and improvements			
	3.2 Justify conclusions of efficiency and value with evidence			
	3.3 Prepare costings and schedules of work that will enable efficient implementation			
	3.4 Design processes that support efficient implementation			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 34

Title		Manage the impact of work activities on the environment		
Level		4		
Credit		4		
Unit accreditation no.		J/506/2907		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand how to support environmentally-friendly working practices	1.1	Explain how to carry out an environmental impact analysis		
	1.2	Compare sources of specialist advice on environmentally-friendly working practices		
	1.3	Analyse the business and environmental benefits of effective energy management policies		
	1.4	Explain the health and safety requirements for the use and disposal of resources and waste		
	2.1	Analyse potentially adverse effects on the environment caused by work activities		
2. Be able to organise work so as to minimise the impact on the environment	2.2	Evaluate the effectiveness of methods of improving environmental sustainability in an organisation		
	2.3	Implement plans and procedures to adapt work practices to make them more environmentally-friendly		
	2.4	Develop a system for colleagues to recommend improvements to make work practices more environmentally-friendly		

3. Be able to manage the environmental impact of the use of resources	3.1 Explain when to obtain specialist environmental management advice			
	3.2 Explain where to seek specialist environmental management advice			
	3.3 Determine the environmental impact of the use of different physical resources			
	3.4 Develop procedures for the disposal of waste and unwanted resources in a way that minimises the impact on the environment			
	3.5 Evaluate the effectiveness of organisational environmental policies and procedures			
	3.6 Adhere to organisational policies and procedures, legal and ethical requirements			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 35

Title		Recruitment, selection and induction practice		
Level		4		
Credit		6		
Unit accreditation no.		R/506/2909		
Learning Outcomes		Initial Evidence Reference		
The learner will:		Initial Evidence Reference		
1. Understand the principles and theories underpinning recruitment, selection and induction practice	1.1 Explain workforce planning techniques			
	1.2 Describe the information needed to identify recruitment requirements			
	1.3 Assess the impact of an organisation's structure and culture on its recruitment and selection policies and practices			
	1.4 Analyse the factors involved in establishing recruitment and selection criteria			
	1.5 Evaluate the suitability of different recruitment and selection methods for different roles			
	1.6 Analyse patterns of employment that affect the recruitment of staff			
	1.7 Explain the factors to be taken into account when developing job specifications, personal specifications and job advertisements			
	1.8 Explain the induction process			
	1.9 Explain the relationship between human resource processes and the induction processes			
2. Be able to recruit people into an organisation	2.1 Determine current staffing needs			
	2.2 Identify current skills needs from identified staffing needs			

	2.3 Identify future workforce needs			
	2.4 Develop a resourcing plan that addresses identified needs within budgetary limitations			
	2.5 Evaluate the cost-effectiveness of different methods of recruitment for an identified role			
	2.6 Explain how recruitment policies and practices meet legal and ethical requirements			
	2.7 Select the most appropriate method of recruitment for identified roles			
3. Be able to select appropriate people for the role	3.1 Plan assessment processes that are valid and reliable			
	3.2 Provide those involved in the selection process with sufficient information to enable them to make informed decisions			
	3.3 Justify assessment decisions with evidence			
4. Be able to induct people into an organisation	3.4 Inform applicants of the outcome of the process in line with organisational procedures			
	3.5 Evaluate the effectiveness of the selection process			
	3.6 Adhere to organisational policies and procedures, legal and ethical requirements when carrying out selection assessments			
	4.1 Develop induction materials that meet operational and new starters' needs			
	4.2 Explain to new starters organisational policies, procedures and structures			
	4.3 Explain to new starters their role and responsibilities			
	4.4 Explain to new starters their entitlements and where to go for help			

	4.5 Assess new starters' training needs				
	4.6 Confirm that training is available that meets operational and new starters' needs				
	4.7 Provide support that meets new starters' needs throughout the induction period				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Optional Units - Group C

Unit 36

Title		Manage health and safety in own area of responsibility		
Level		4		
Credit		5		
Unit accreditation no.		D/504/4056		
Learning Outcomes		↘		
The learner will:		Initial Evidence Reference		
1. Understand responsibilities and liabilities in relation to health and safety legislation	1 Evaluate personal responsibilities and liabilities under health and safety legislation			
	1.2 Describe an organisation's responsibilities and liabilities under health and safety legislation			
	1.3 Identify specialists to consult with when health and safety issues outside own remit are identified			
	2.1 Describe the types of hazards and risks that may arise in relation to health and safety			
2. Understand how to assess, monitor and minimise health and safety risks in own area of responsibility	2.2 Explain how to use systems for identifying hazards and assessing risks			
	2.3 Explain how to monitor, evaluate and report on health and safety within own area of responsibility			
3. Be able to review health and safety policy in own area of responsibility	2.4 Describe the types of actions which should be undertaken to control or eliminate health and safety hazards			
	3.1 Review written health and safety policy against requirements for own area of responsibility			
	3.2 Communicate any recommendations for changes to health and safety policy to relevant individuals			

4. Be able to communicate health and safety policy in own area of responsibility	4.1 Communicate written health and safety policy to all people in own area of responsibility and other relevant parties					
5. Be able to monitor health and safety in own area of responsibility	4.2 Ensure all people in own area of responsibility and other relevant parties understand written health and safety policy					
	5.1 Evaluate systems for identifying and assessing health and safety hazards and risks within own area of responsibility					
	5.2 Assess working environment within own area of responsibility against organisation's health and safety policy					
	5.3 Identify and evaluate non-compliance with health and safety policy and practices within own area of responsibility					
	5.4 Take appropriate action to eliminate or control identified hazards and identified risks					
	5.5 Evaluate health and safety requirements in project or operational plans within own area of responsibility					
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>						
<p>Simulation Simulation is not allowed.</p>						

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 37

Title		Contribute to the design and development of an information system			
Level		4			
Credit		5			
Unit accreditation no.		A/506/1950			
Learning Outcomes The learner will:		Initial Evidence Reference			
The learner can:		▼			
1. Understand information system design requirements	1.1 Analyse the requirements, advantages and limitations of different ways of storing and managing information in an organisation				
	1.2 Assess the ways in which information can be used by an organisation				
	1.3 Evaluate the implications of data protection requirements for the design of an information system				
	2. Be able to contribute to the specification of an information system	2.1 Identify the users and stakeholders of an information system			
		2.2 Identify the information that will be managed within a system			
	2.3 Analyse the impact of budgetary constraints on the design of an information system				
	2.4 Specify the functionality of a system that is capable of delivering agreed requirements				
2.5 Specify access and security restrictions and systems that meet the design specification of an information system					
2.6 Identify resources needed to implement and operate the system					
2.7 Adhere to organisational policies and procedures, legal and ethical requirements when contributing to the specification of an information system					

3. Be able to recommend options for the development of an information system	3.1 Evaluate the advantages and limitations of proprietary and customised information systems			
	3.2 Evaluate the advantages and limitations of designing a system in-house and commissioning a system from an external source			
	3.3 Identify the implications of testing information systems before finalising the specification			
	3.4 Justify recommendations for the development of an information system based on an analysis of cost-effectiveness and functionality			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 38

Title	Manage information systems		
Level	4		
Credit	6		
Unit accreditation no.	F/506/1951		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the management of information systems	1.1 Explain the uses of an information system		
	1.2 Describe typical information system interfaces		
	1.3 Analyse the implications of system updates and system developments to an organisation		
	1.4 Analyse the use of stakeholders' feedback on the effectiveness of an information system		
	1.5 Evaluate the implications of data protection requirements for the management and use of an information system		
2. Be able to set up information system processes	2.1 Develop standard operating procedures for administrative processes that meet organisational and legal requirements		
	2.2 Implement management processes that are capable of identifying and resolving problems		
	2.3 Analyse users' training needs for an information system		

3. Be able to manage an information system	3.1 Monitor the quality of information against agreed key performance indicators (KPIs)				
	3.2 Update information systems in line with business and users' needs				
	3.3 Provide training and support in the use of information systems to users and stakeholders				
	3.4 Manage problems in the information system in a way that minimises disruption to business				
	3.5 Manage problems in the information system in a way that minimises disruption to business				
	3.6 Make recommendations for improvements that will enhance the efficiency of an information system				
	3.7 Adhere to organisational policies and procedures, legal and ethical requirements in the management of an information system				
	<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p> <p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 39

Title	Manage events		
Level	4		
Credit	6		
Unit accreditation no.	M/506/1959		
Learning Outcomes	Assessment Criteria	Initial	Evidence Reference
The learner will:	The learner can:		
1. Understand the management of an event	1.1 Explain how organisational objectives will be met by an event		
	1.2 Explain the flexibilities and constraints of an event's budget		
	1.3 Evaluate the use of project management techniques in event management		
	1.4 Analyse how models of contingency and crisis management can be applied to event management		
	1.5 Analyse the use of customer relationship management (CRM) systems to attract attendees		
	1.6 Evaluate the application of the principles of logistics to event management		
	1.7 Describe the insurance requirements of an event		

2. Be able to manage the planning of an event	2.1 Identify the purpose of an event and the key messages to be communicated					
	2.2 Identify target attendees for an event					
	2.3 Assess the impact of an event on an organisation and its stakeholders					
	2.4 Establish requirements for resources, location, technical facilities, layout, health and safety					
	2.5 Identify how event-related risks and contingencies will be managed					
	2.6 Develop an event plan that specifies objectives, success and evaluation criteria					
	2.7 Make formal agreements for what will be provided, by whom and when					
	2.8 Determine methods of entry, security, access and pricing					
3. Be able to manage an event	3.1 Manage the allocation of resources in accordance with the event management plan					
	3.2 Respond to changing circumstances in accordance with contingency plans					
	3.3 Deliver agreed outputs within the timescale					
	3.4 Manage interdependencies, risks and problems in accordance with the event management plan					
	3.5 Comply with the venue, insurance and technical requirements					
	3.6 Apply the principles and good practice of customer care when managing an event					
	3.7 Adhere to organisational policies and procedures, legal and ethical requirements when managing an event					

4. Be able to follow up an event	4.1 Ensure that all post-event leads or actions are followed up			
	4.2 Optimise opportunities to take actions that are likely to further business objectives			
	4.3 Evaluate the effectiveness of an event against agreed criteria			
	Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.			
Simulation Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 40

Title	Review the quality of customer service		
Level	4		
Credit	4		
Unit accreditation no.	F/506/2176		
Learning Outcomes	Assessment Criteria	Initial	Evidence Reference
The learner will:	The learner can:		
1. Understand how to review the quality of customer service	1.1 Explain the value of measuring the quality of customer service		
	1.2 Analyse the criteria for and factors involved in setting customer service standards		
	1.3 Explain how to construct representative samples		
	1.4 Analyse methods of validating information and information sources		
	1.5 Explain how to set and use customer service performance metrics		
	1.6 Explain the use of customer feedback in the measurement of customer service		
	1.7 Analyse the advantages and disadvantages of a range of data analysis methods		

2. Be able to plan the measurement of customer service	<p>2.1 Identify the features of customer service against which customer satisfaction can be measured</p> <p>2.2 Select data collection methods that are valid and reliable</p> <p>2.3 Specify monitoring techniques that measure customer satisfaction</p> <p>2.4 Establish evaluation objectives and key performance indicators (KPIs) in the measurement of customer service</p> <p>2.5 Specify the information to be collected</p>	3. Be able to evaluate the quality of customer service	<p>3.1 Validate the information collected to identify useable data</p> <p>3.2 Use information analysis methods that are appropriate to the nature of the information collected</p> <p>3.3 Identify instances of effective customer service, shortfalls and gaps from the information analysis against agreed criteria</p> <p>3.4 Develop recommendations that address identified areas for improvement supported by evidence</p>	<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p> <p>Simulation Simulation is not allowed.</p>	
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Assessor feedback

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Unit 41

Title		Contribute to the improvement of business performance		
Level		3		
Credit		6		
Unit accreditation no.		D/506/1911		
Learning Outcomes The learner will:		Initial Evidence Reference		
		▼		
1. Understand the principles of resolving business problems	1.1	Explain the use of different problem-solving techniques		
	1.2	Explain the organisational and legal constraints relating to problem-solving		
	1.3	Describe the role of stakeholders in problem-solving		
	1.4	Describe the steps in the business decision-making process		
	1.5	Analyse the implications of adopting recommendations and implementing decisions to solve business problems		
2. Understand improvement techniques and processes	2.1	Describe the purpose and benefits of continuous improvement		
	2.2	Analyse the features, use and constraints of different continuous improvement techniques and models		
	2.3	Explain how to carry out a cost-benefit analysis		
3. Be able to solve problems in business	2.4	Explain the importance of feedback from customers and other stakeholders in continuous improvement		
	3.1	Identify the nature, likely cause and implications of a problem		
	3.2	Evaluate the scope and scale of a problem		

	<p>3.3 Analyse the possible courses of action that can be taken in response to a problem</p> <p>3.4 Use evidence to justify the approach to problem-solving</p> <p>3.5 Develop a plan and success criteria that are appropriate to the nature and scale of a problem</p> <p>3.6 Obtain approval to implement a solution to a problem</p> <p>3.7 Take action to resolve or mitigate a problem</p> <p>3.8 Evaluate the degree of success and scale of the implications of a solved problem</p>			
<p>4. Be able to contribute to the improvement of activities</p> <p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p> <p>Simulation Simulation is not allowed.</p>	<p>4.1 Identify the nature, scope and scale of possible contributions to continuous improvement activities</p> <p>4.2 Measure changes achieved against existing baseline data</p> <p>4.3 Calculate performance measures relating to cost, quality and delivery</p> <p>4.4 Justify the case for adopting improvements identified with evidence</p> <p>4.5 Develop standard operating procedures and resource plans that are capable of implementing agreed changes</p>			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 42

Title		Negotiate in a business environment		
Level		3		
Credit		4		
Unit accreditation no.		H/506/1912		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the principles underpinning negotiation	1.1	Describe the requirements of a negotiation strategy		
	1.2	Explain the use of different negotiation techniques		
	1.3	Explain how research on the other party can be used in negotiations		
	1.4	Explain how cultural differences might affect negotiations		
	2. Be able to prepare for business negotiations	2.1	Identify the purpose, scope and objectives of the negotiation	
	2.2	Explain the scope of their own authority for negotiating		
	2.3	Prepare a negotiating strategy		
	2.4	Prepare fall-back stances and compromises that align with the negotiating strategy and priorities		
	2.5	Assess the likely objectives and negotiation stances of the other party		
	2.6	Research the strengths and weaknesses of the other party		

3. Be able to carry out business negotiations	3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities			
	3.2 Adapt the conduct of the negotiation in accordance with changing circumstances			
	3.3 Maintain accurate records of negotiations, outcomes and agreements made			
	3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 43

Title		Resolve customers' problems		
Level		3		
Credit		4		
Unit accreditation no.		K/506/2169		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the monitoring and resolution of customers' problems	1.1	Assess the suitability of a range of techniques for monitoring customer problems		
	1.2	Explain how to use the resolution of customers' problems to improve products and/or services		
	1.3	Explain how the successful resolution of customers' problems contributes to customer loyalty and enhanced business performance		
	1.4	Explain the features of negotiating techniques used to resolve customers' problems		
2. Be able to deal with customers' problems	2.1	Confirm the nature and cause of customers' problems		
	2.2	Explain when customers' problems should be treated as complaints		
	2.3	Explain the benefits to customers and the organisation of the options available to solve problems		
	2.4	Explain the drawbacks to customers and the organisation of the options available to solve problems		
	2.5	Explain to customers the options for resolving their problems		
	2.6	Agree solutions that meet customers' and organisational requirements within their own levels of authority		
	2.7	Inform colleagues of the nature of problems and actions taken		

	2.8 Evaluate the effectiveness of the resolution of customers' problems				
	2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' problems				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 44

Title		Resolve customers' complaints		
Level		3		
Credit		4		
Unit accreditation no.		R/506/2151		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the monitoring and resolution of customers' complaints	1.1	Assess the suitability of a range of monitoring techniques for customers' complaints		
	1.2	Explain how to identify those complaints that should prompt a review of the service offer and service delivery		
	1.3	Explain negotiating techniques used to resolve customers' complaints		
	1.4	Explain conflict management techniques used in dealing with upset customers		
	1.5	Explain organisational procedures for dealing with customer complaints		
	1.6	Explain when to escalate customers' complaints		
	1.7	Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint		
	1.8	Explain the advantages and limitations of offering compensation or replacement products and/or services		
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<p>2. Be able to deal with customers' complaints</p>	<p>2.1 Confirm the nature, cause and implications of customers' complaints</p> <p>2.2 Take personal responsibility for dealing with complaints</p> <p>2.3 Communicate in a way that recognises customers' problems and understands their points of view</p> <p>2.4 Explain the advantages and limitations of different complaint response options to customers</p> <p>2.5 Explain the advantages and limitations of different complaint response options to the organisation</p> <p>2.6 Keep customers informed of progress</p> <p>2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority</p> <p>2.8 Record the outcome of the handling of complaints for future reference</p> <p>2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints</p>		
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>			
<p>Simulation Simulation is not allowed.</p>			

Assessor feedback

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Unit 45

Title		Analyse competitor activity		
Level		3		
Credit		3		
Unit accreditation no.		Y/502/9927		
Learning Outcomes The learner will:		Assessment Criteria The learner can:		
		Initial		
		Evidence Reference		
1. Be able to identify competitor activity		1.1 Identify organisations competing for the same customers		
		1.2 Identify potentially threatening competitor activity		
		1.3 Identify competitors' objectives		
		1.4 Identify valid sources of information on competitors and their activity		
		1.5 Explain the advantages and disadvantages of sources of information on competitors and their activity		
2. Be able to determine the nature of the threat posed by competitor activity		2.1 Assess the strengths and weaknesses of competitor activity against agreed criteria		
		2.2 Assess the strengths and weaknesses of competitors' products and/or services against agreed criteria		
		2.3 Determine the nature and extent of the possible threat posed by competitor activity and products and/or services		
Evidence Requirements		Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.		
Simulation		Simulation is not allowed.		

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


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Unit 46

Title		Developing sales proposals		
Level		4		
Credit		5		
Unit accreditation no.		A/502/8656		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand how to write sales proposals	1.1	Explain how to write a proposal that differentiates the offer from that of a competitor and promotes organisational strengths		
	1.2	Describe how to put together a persuasive argument based on quantitative and qualitative evidence		
	1.3	Explain the importance of addressing the brief in tender documentation		
	1.4	Explain the importance of using the “house style” in proposals		
	1.5	Explain the legal and ethical issues relating to sales proposals		
	1.6	Explain the client’s procedures for submitting sales proposals		
	2. Be able to develop sales proposals	2.1	Ensure the prospect’s or customer’s requirements are addressed in the proposal	
2.2		Ensure that all identified issues requiring clarification are resolved before the proposal is finalised		
2.3		Identify the conditions and constraints which need to be included within the proposal in order to protect the organisation’s interests		
2.4		Present the proposal in “house style”		
2.5		Ensure that the proposal is based on market factors		

	2.6 Provide the required level of detail as briefed by the prospect or customer			
	2.7 Ensure that the price reflects the value within the proposal			
	2.8 Gain internal approval before submission			
	2.9 Supply the proposal within the agreed timescale			
3. Be able to evaluate the proposal	3.1 Obtain feedback from colleagues and the customer on the proposal			
	3.2 Evaluate the outcome of the proposal and recommend improvements for the future			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Unit 47

Title		Prioritising information for sales planning		
Level		4		
Credit		3		
Unit accreditation no.		D/502/8651		
Learning Outcomes		Assessment Criteria ▼		
The learner will:		The learner can:		
1. Understand sources and types of information that support sales	1.1 Describe the information about customers' behaviour that is relevant to sales			
	1.2 Explain the nature of competitors' sales activities			
	1.3 Explain the relevance of information from the external business environment to sales			
	1.4 Describe sources of business information relevant to sales			
2. Understand internal information that supports sales	2.1 Describe the customer base of the organisation			
	2.2 Explain organisational information storage procedures			
	2.3 Explain organisational procedures for communicating sales-based information to the sales team			
3. Be able to carry out a business audit of the internal and external sales environment	3.1 Obtain information about customers and competitors from a variety of sources to enable a business audit to be conducted			
	3.2 Organise sales information to support effective sales planning			
	3.3 Prioritise the internal strengths and weaknesses, and external opportunities and threats the organisation faces in relation to sales objectives			

4. Be able to use sales information to support the sales planning function	<p>4.1 Monitor trends and developments that impact on business and sales activities against agreed criteria</p> <p>4.2 Identify market developments and their implications for organisational sales plans</p> <p>4.3 Ensure that sales information is communicated to those who need it in accordance with organisational procedures</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 48

Title	Manage customer service operations		
Level	4		
Credit	7		
Unit accreditation no.	M/506/2898		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the management of customer service operations	1.1 Explain the basis for allocating resources		
	1.2 Assess the suitability of a range of methods to monitor customer service operations		
	1.3 Explain the strategies needed to deliver seamless customer service		
	1.4 Explain techniques used to develop solutions to problems		
	1.5 Evaluate sources of information on customer performance data		
	1.6 Analyse a range of techniques to identify patterns and trends in customer behaviour and customer service performance		
	1.7 Analyse a range of possible improvements to customer service operations		

2. Be able to plan customer service operations	<p>2.1 Define the service offer to meet identified customer expectations</p> <p>2.2 Develop plans that will enable sustainable and consistent customer service operations to agreed standards</p> <p>2.3 Develop contingencies that address identified risks</p> <p>2.4 Specify targets, objectives, key performance indicators (KPIs) and monitoring arrangements</p> <p>2.5 Communicate objectives, targets, standards and procedures to staff</p>	3. Be able to manage customer service operations	<p>3.1 Allocate resources according to agreed priorities</p> <p>3.2 Keep staff informed of developments in the customer service offer</p> <p>3.3 Keep staff informed of developments in best practice for the delivery of customer service</p> <p>3.4 Maintain positive working relationships amongst staff</p> <p>3.5 Carry out monitoring activities in accordance with plans</p> <p>3.6 Manage deviations from expected performance and service failures in accordance with contingency plans</p> <p>3.7 Use feedback from staff and customers to make improvements</p> <p>3.8 Take action within the limits of their responsibility to make improvements to customer service performance</p>	4. Be able to prepare staff for the delivery of customer service	<p>4.1 Confirm that staff understand the vision, objectives, roles, plans, standards and procedures to deliver customer service</p> <p>4.2 Provide training and support that will enable staff to deliver customer service to the required standards</p> <p>4.3 Communicate to staff their roles, responsibilities and work plans in line with delivery plans</p>		
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5. Be able to measure customer service performance	5.1 Take action to ensure that systems to collect agreed performance data are in place			
	5.2 Identify trends of customer behaviour and customer service performance from performance data			
	5.3 Benchmark performance against agreed measures			
	5.4 Address identified anomalies and problems			
	5.5 Identify areas for improvement within customer service			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation may be used for assessment criteria 3.6 (Manage deviations from expected performance and service failures in accordance with contingency plans) and 5.4 (Address identified anomalies and problems) if no naturally occurring evidence is available.				
Supplementary evidence				
Supplementary evidence such as questioning may be used for assessment criteria 3.6 (Manage deviations from expected performance and service failures in accordance with contingency plans) and 5.4 (Address identified anomalies and problems) if no naturally occurring evidence is available.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

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