

## Level 3 Certificate in Business Innovation, Sustainability and Growth

Regulator	Ofqual						
Qualification Reference Number	603/3522/1						
Qualification Start Date	1 <sup>st</sup> September 2018						
Last Date for Registration	31 <sup>st</sup> August 2025						
Available Age Ranges	<table><tr><td>Pre-16</td><td>✗</td></tr><tr><td>16-18</td><td>✓</td></tr><tr><td>19+</td><td>✓</td></tr></table>	Pre-16	✗	16-18	✓	19+	✓
Pre-16	✗						
16-18	✓						
19+	✓						
Total Qualification Time	230 hours						
Guided Learning	154 hours						

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## About This Qualification

This qualification is for those who wish to gain the knowledge and skills required to support the reduction in business mortality. It will support those already operating within business to increase the productivity and effectiveness of its operations and therefore increase the potential for sustainability and growth.

There are no formal entry requirements however, in order to benefit from undertaking the qualification, learners should possess communication skills sufficient to allow them to address the assessment requirements.

Assessment should be through the production of a portfolio of evidence presented for assessment by a suitably qualified Assessor. Mandatory assessment methods, where applicable, can be seen within the individual unit details.

Those who complete this qualification may wish to undertake other SFEDI Awards qualifications further details of which can be found on our website.

SFEDI Awards offers a range of qualifications within our Enterprise Skills Development series that support the development of transferable employability and enterprise skills.

## Qualification Overview

<b>Qualification Structure</b>	Learners must achieve a minimum of 23 credits from the units listed below
<b>Assessor Qualification Required</b> (please check details of appropriate Assessor qualifications later within this document)	No
<b>IQA Qualification Required</b> (please check details of appropriate IQA qualifications later within this document)	No

Unit Title	Reference Number	Mandatory /Optional	Unit Level	Credit Value	Guided Learning (hours)
<b>People Management</b>					
The Entrepreneurial Mindset	A/506/7084	O	3	5	30
Developing the Mindset and Skills Required for Enterprise	F/503/7505	O	3	5	30
Manage Own Professional Development Within an Organisation	D/508/3018	O	3	4	20
Assess Personal Abilities to Run a Business	A/503/8877	O	3	2	16
Develop and Maintain Professional Networks	M/615/4765	O	3	3	15
Support Learning and Development Within Own Area of Responsibility	H/508/3022	O	3	5	25
Delivering Learning Activities	A/508/0708	O	3	6	30
Understand a Business and the Role of People Management	D/508/0703	O	3	4	20
Evaluate and Develop Own Practices in People Management	Y/508/0702	O	3	4	20
Develop Working Relationships with Colleagues	F/508/3027	O	3	3	15
Preparing for the Role of a Mentor	K/615/3324	O	3	2	8
The Role of HR in Encouraging Innovation and Creativity Within Business	M/508/1712	O	3	3	30
Managing Personal Information Within a Business	R/508/0701	O	3	2	10
Recruiting People for a Business	H/508/0704	O	3	6	30



Managing Employees and Their Rights	T/508/0707	O	3	6	30
Digital and Information Technologies for HR	L/508/1703	O	3	3	30
Understand Age Diversity Management	M/506/8331	O	3	2	12
Assess Age Diversity Management in a Business	T/506/8332	O	3	2	12
Develop a Plan for Age Diversity Management	K/506/8330	O	3	2	12
Managing the Risk of Aggressive and Challenging Behaviour in the Workplace	R/508/1699	O	3	3	30
<b>Innovation and Creativity</b>					
The Role of Innovation and Creativity to Growth Within Business	J/506/7086	O	3	7	40
Contribute to Innovation in Business	T/615/4766	O	3	6	25
Supporting Change Within a Business	K/508/0705	O	3	3	15
Support Team Members in Identifying, Developing and Implementing New Ideas	A/615/4767	O	3	4	20
Innovation and Growth Using Social Media	F/615/4768	O	3	5	30
Using Customer Relationship Management to Support Innovation and Growth	J/615/4769	O	3	5	30
Supporting Innovation and Growth Through Financial Management	F/615/4771	O	3	4	40
<b>Management</b>					
The Business Environment	T/506/7083	O	3	6	30
Leadership and Teamwork	H/503/7500	O	3	10	60
Develop Your Business Idea	Y/500/4591	O	3	1	10
Prepare a Plan for a Business	Y/508/5401	O	3	2	16
Produce and Implement a Business Plan	F/503/8962	O	3	2	16
Estimate Financial Needs for a Business	F/503/8881	O	3	3	24
Understand Business Resilience	R/504/6922	O	3	2	8
Develop a Business Resilience Plan	Y/504/6923	O	3	2	8
Understand the Process of Exporting	J/506/7959	O	3	2	12
Assess the Potential to Export	F/506/7958	O	3	2	12

Develop a Plan for Exporting	A/506/7957	O	3	2	12
Performance Management in a Business	M/508/0706	O	3	6	30
Set Objectives and Provide Support for Team Members	L/615/4773	O	3	5	35
Plan, Allocate and Monitor Work of a Team	Y/615/4775	O	3	5	35
Lead and Manage Meetings	Y/508/3020	O	3	4	20
Make Effective Decisions	D/615/4776	O	3	3	20
Managing Quality Within Business	H/615/4777	O	3	5	40
Manage Business Risk	K/615/4778	O	3	4	21
Manage the Impact of Work Activities on the Environment	H/615/4780	O	3	4	30
Lean Organisation Techniques in Business	T/615/4783	O	3	5	34
Communicate in a Business Environment	K/615/4764	O	3	3	24
Planning for Growth	R/507/6910	O	3	2	20
Developing Growth Using the Business Chassis Concept	D/507/6912	O	3	3	30
Developing Growth Through Market Research	H/507/6913	O	3	3	30
Developing Growth Through Pricing Strategies	K/507/6914	O	3	1	10
Developing Growth Through Marketing Plans	M/507/6915	O	3	3	30
Developing Growth Through Social Media Strategies	T/507/6916	O	3	2	20
Developing Growth Through Financial Planning	A/507/6917	O	3	2	20
Developing Growth Through Tendering Opportunities	F/507/6918	O	3	3	30
Planning to Take Advantage of a VCSE Opportunity	L/507/1852	O	3	14	21
Introduction to Business Planning for VCSE Organisations	R/507/1853	O	3	14	21
HR Skills for VCSE Managers	Y/507/1854	O	3	15	25
Locating and Responding to Tender Opportunities	D/507/1855	O	3	13	15
<b>New Market Development</b>					
Assess and Plan New Markets for a Business	Y/507/0798	O	3	2	12
Locating and Responding to Tender Opportunities	A/615/4784	O	3	5	15
Manage a Tendering Process	J/615/4786	O	3	4	21

<b>Business Improvement</b>					
Business Improvement Tools and Techniques	R/615/4788	O	3	5	35
Complying with Statutory Regulations and Organisational Safety Requirements	L/615/4790	O	3	5	35
Leading Effective Teams	Y/615/4792	O	3	4	26
Applying Workplace Organisation Techniques	A/615/4798	O	3	6	51
Apply Continuous Improvement Techniques (Kaizen)	F/615/4799	O	3	6	55
Developing Visual Management Systems	T/615/4802	O	3	5	41
Carrying Out Problem Solving Activities	J/615/4805	O	3	5	41
Analysing and Selecting Parts for Improvement	R/615/4807	O	3	6	58
Apply Lead Time Analysis	H/615/4844	O	3	5	42
Carry Out Value Stream Mapping	T/615/4816	O	3	6	58
Apply Set-up Reduction Techniques	F/615/4818	O	3	6	58
Apply Total Productive Maintenance (TPM)	F/615/4821	O	3	6	54
Apply Flow Process Analysis	Y/615/4825	O	3	6	58
Apply Policy Deployment (Hoshin Kanri, quality operating systems, business plan deployment)	H/615/4827	O	3	5	42
Creating Standard Operating Procedures	M/615/4829	O	3	5	42
Apply Basic Statistical Analysis	K/615/4831	O	3	4	36
Apply Failure Modes and Effects Analysis	T/615/4833	O	3	5	42
Apply Mistake/Error Proofing (Poka Yoke)	J/615/4836	O	3	5	42
Carrying Out Statistical Process Control (SPC) Procedures	R/615/4838	O	3	4	35
<b>Customer Service</b>					
Organise the Delivery of Reliable Customer Service	D/508/3021	O	3	6	40
Work with Others to Improve Customer Service	A/508/3026	O	3	8	53
Improve the Customer Relationship	Y/615/4839	O	3	7	30
Use Customer Service as a Competitive Tool	L/615/4840	O	3	5	35

Principles of Customer Service in a Contact Centre	R/615/4841	O	3	4	26
<b>Sales</b>					
Principles of Marketing and Selling in a New Business	H/503/3432	O	3	3	24
Plan to Sell a Product or Service	J/503/8865	O	3	2	16
Contributing to the Development and Launch of New Products and/or Services	T/508/3011	O	3	4	26
Pricing for Sales Promotions	H/508/3005	O	3	5	34
Obtaining and Analysing Sales Related Information	R/508/3002	O	3	4	24
Obtaining and Analysing Competitor Information	Y/508/3003	O	3	3	18
Buyer Behaviour in Sales Situations	D/508/3004	O	3	3	27
Prioritising Information for Sales Planning	A/508/3012	O	4	3	20
Developing Sales Proposals	J/508/3014	O	4	5	30
Preparing and Delivering a Sales Presentation	K/508/3006	O	3	4	28
Building and Retaining Sales Relationships	L/508/3015	O	4	5	34
Assessing Customers' Credit Status	A/508/3009	O	3	4	26
Assisting Customers in Obtaining Finance for Purchases	T/508/3008	O	3	2	11
Negotiating, Handling Objections and Closing Sales	Y/508/2997	O	3	4	22
Developing and Implementing Sales Support and Customer Service Programmes	R/508/3016	O	4	5	35
Communicating Using Digital Marketing/Sales Channels	M/508/3010	O	3	4	26
Principles and Processes of Systems and Technology in a Contact Centre	Y/615/4842	O	3	4	26
Principles of Sales Activities and Customer Support in a Contact Centre	D/615/4843	O	3	4	24
Principles of Social Media Advertising and Promotion	J/503/9322	O	3	6	34
Principles of Social Media Within a Business	R/503/9324	O	3	6	42
Social Networking Management for a Business	Y/503/9325	O	3	7	38

## About SFEDI Awards

SFEDI Awards was founded in 2007 creating the first dedicated Awarding Organisation specialising in business enterprise and business support, a standing still enjoyed to this day within the UK.

Our qualifications are built on the extensive research that underpins the SFEDI® National Occupational Standards and the expertise of the Institute of Enterprise and Entrepreneurs, the UK's only professional Institute dedicated to enterprise.

With our qualifications having been designed to be flexible to meet the wide range of demand within enterprise learning, we recognise the needs of industry to develop enterprising and entrepreneurial individuals to support the sustainability and growth of business and the wider community.

As the only dedicated UK Awarding Organisation, SFEDI Awards designs and develops a range of bespoke business enterprise and business support qualifications that are delivered through members of our both UK based and international delivery network.

Within this we also develop and publish best practice materials and resources to support the delivery of our qualifications to a high standard to ensure that learners gain all they require when either starting or progressing their enterprise journey.

## Customer Feedback

We are always keen to understand learners and centres thoughts on the content of all aspects of our qualifications and welcome feedback. This can be done by emailing us at [customerservices@sfediawards.com](mailto:customerservices@sfediawards.com) and indicate in the header field, 'Customer Feedback'.

## The Regulated Qualifications Framework (RQF)

The Regulated Qualifications Framework (RQF) is the vehicle for regulating qualifications within England and vocational qualifications within Northern Ireland. The framework provides a single, simple system for cataloguing all qualifications regulated by Ofqual by both level and size.

Qualifications on the Regulated Qualifications Framework (RQF) have both a level and a size allocated to them in order to support individuals in making an informed choice about the most appropriate qualification for them.

Each RQF qualification title contains the following:

- ✓ The level of the qualification (from entry level to Level 8)
- ✓ The size of the qualification (Award/Certificate/Diploma)
- ✓ Details indicating the content of the qualification

Each qualification has a published structure setting out what must be achieved by an individual in order to demonstrate their knowledge and skills in order to meet the required standard as part of the delivery and certification process.

### Qualification Level

The level of a qualification relates to the complexity and difficulty associated with the development of the knowledge and skills of a particular subject.

Qualification levels start at Entry Level and then progress from Level 1 through to Level 8

### Qualification Size

The size of a qualification is an indication of the total amount of time a qualification will take to complete indicated using the term Total Qualification Time (TQT)

Qualification sizes are expressed using the terms Award, Certificate or Diploma

### Total Qualification Time (TQT)

Total Qualification Time (TQT) provides a guide of the average time it takes to complete a qualification broken down into two types of activity:

- ✓ **Guided Learning (GL)** - made up of activities completed by the learner under the direct instruction or supervision of a lecturer, supervisor or tutor whether through physical presence or electronic means provided as a measurement of time in hours
- ✓ **Total Qualification Time (TQT)** - made up of the Guided Learning (GL) plus all other time taken in preparation, study or any other form of participation in education or training but not under the direct supervision of a lecturer, supervisor or tutor provided as a measurement of time in hours

TQT is a new system used by the Regulator and will be phased in up to 31 December 2017.

## SFEDI Directory

The SFEDI Directory is central to the drive towards a more competitive enterprise landscape with increased employment opportunities, improved productivity and, ultimately, greater prosperity regionally and nationally.

It is designed and maintained to guarantee that advisers, coaches, consultants, mentors and trainers can share their up-to-date, relevant qualifications and valuable experience with the businesses that need them.

You may be one of those businesses once you've completed this qualification, continuing your entrepreneurial journey through to starting your business and the SFEDI Directory could help you in the following ways:

- ✓ A national register of experienced business and enterprise support professionals
- ✓ A Directory with the core belief of engaging the views of micro and small businesses as part of the professional's initial and ongoing verification and accreditation process
- ✓ Compiled to support those who help micro, small and medium sized enterprises verify the professional's credentials and experience
- ✓ Ideal for those supporting businesses at every stage of the business life cycle
- ✓ An easy-to-use and comprehensive search function allowing you to easily and quickly verify the credentials and experience of business and enterprise support professionals
- ✓ A credible source of nationally verified support that's proven trusted, delivers real results and is simple and free to use

Further details about the SFEDI Directory can be found at [www.sfedidirectory.co.uk](http://www.sfedidirectory.co.uk)

## Institute of Enterprise and Entrepreneurs (IOEE)

The Institute of Enterprise and Entrepreneurs (IOEE) is the UK's only Institute dedicated to 'learning by doing' for anyone thinking about starting or running their own business and those who support them. By joining the IOEE it enables likeminded entrepreneurs to come together to share knowledge, experience and skills.

By undertaking this qualification an individual is eligible to receive one year's study membership\* of the Institute enabling them to take advantage of the following benefits:

- ✓ Regular information on what's happening through the IOEE Enterprise and Mentoring Monthly including case studies of people just like them who are becoming more enterprising
- ✓ Opportunity to access the national government Start Up Loan initiative through the [IOEE and Start Up Loan strategic partnership](#)
- ✓ Opportunities to meet other business owners in the online communities who are happy to share how they have been there, done it, got the t-shirt and continue to wear it!
- ✓ Enterprise resources including videos and articles to enhance their understanding of enterprise and enterprise support

- ✓ The chance to meet other members through Meet a Mentor and networking events
- ✓ A chance to compare notes with other entrepreneurs and business support professional through the online groups and forums
- ✓ A chance to promote themselves to other IOEE members through the IOEE profile page

\*One year's free study membership of the IOEE for SFEDI Awards learners aged 18 years and over and undertaking an eligible qualification

Further details of the Institute can be found at [www.ioee.uk](http://www.ioee.uk)

## What Does SFEDI Awards Expect?

To offer this qualification an organisation is required to hold SFEDI Awards centre status and also apply for qualification approval. The latest information on the SFEDI Awards website can be viewed by clicking [here](#).

As we operate as a regulated Awarding Organisation we hold high regard to the standards of professional service we provide to centres and, in turn, the service centres deliver to their learners.

To support this we operate a number of policies and procedures to ensure that we always operate in a fair and open manner.

Published on the SFEDI Awards website are policies and procedures covering the following areas:

- ✓ Appeals
- ✓ Complaints
- ✓ Continuous Professional Development (CPD)
- ✓ Customer Service Policy
- ✓ Direct Claims Status
- ✓ Equal Opportunities
- ✓ Invoicing
- ✓ Qualification Titling in Marketing and Logo Usage
- ✓ Malpractice and Maladministration
- ✓ Privacy
- ✓ Quality Bulletins
- ✓ Reasonable Adjustments
- ✓ Recognised Prior Learning
- ✓ Registration and Certification
- ✓ Retention of Records
- ✓ Whistleblowing

We are continually updating the policies and procedures available to view through the website so please keep checking back to make sure you have the latest information available. You can see the latest versions of all of these policies by clicking [here](#).



## Learner Registration and Certification

Our online registration and certification system, Registr8, allows you to process information efficiently and quickly. You can register and certificate learners, produce reports, retrieve and view customer information and also access invoices and monitoring reports.

Learners should be registered with SFEDI Awards within 4 weeks of commencing the programme or qualification. It is the responsibility of the centre to obtain a Unique Learner Number (ULN), from the [Learner Records Service](#), and accurately enter this into the Registr8 system in order that learner achievements can be recorded on their Personal Learning Record (PLR).

SFEDI Awards centres must use the Registr8 system to indicate where a learner has successfully completed the qualification and/or units within it. Where a centre holds Direct Claims Status (DCS) certificates will be issued, where this is not the case an External Quality Assurer will contact the centre to arrange sampling.

## How We Monitor Qualification Delivery

We pride ourselves in the continued quality of the delivery of our qualifications through our delivery network and in order to ensure that this is maintained we conduct both folder and systems monitoring activities.

We provide two monitoring activity reviews per year where a member of our Monitoring Team will review your organisation's activities in order to provide feedback and support on your qualification delivery. If you think you need a visit simply contact our Customer Service Team on [customerservices@sfediawards.com](mailto:customerservices@sfediawards.com) or 0845 224 5928 and we will be more than happy to discuss your requirements with you.

You will be provided with a report on completion of the monitoring activity feeding back on your organisation's current performance against the SFEDI Awards Core Principles and planning activities to help support continuous improvement and the sharing of best practice.

In order to inform future monitoring activities, SFEDI Awards makes use of a risk rating system that provides an organisation with a rating determined by the findings of monitoring activities.

SFEDI Awards also conducts additional monitoring activities in order to provide support and ensure the continued quality of the delivery of our qualifications including:

- ✓ Customer Satisfaction Surveys
- ✓ Mystery Shopping
- ✓ Qualification Consultations and Reviews
- ✓ Thematic Reviews

Each of these allows us to ensure that the qualifications we provide and the way they are provided continues to support the development of the enterprise skills agenda and a truly entrepreneurial community.

## Direct Claims Status (DCS)

We operate a system called Direct Claims Status (DCS) providing you with the ability to certificate learners' achievements without the need for external monitoring activity taking place first. It is awarded at qualification level and not centre level and can be awarded and removed dependent on the consistency, quality and integrity of the qualification delivery within the centre.

Where a centre holds DCS a monitoring officer from SFEDI Awards will sample a selection of the folders worked on and completed since the last external monitoring activity.

Where a centre does not hold DCS for a qualification it will require an external monitoring activity to take place prior to being able to gain certification for learners.

## Internal Quality Assurance

Internal Quality Assurance will be completed by the SFEDI Awards centre and involves sampling of learners' documents and assessment decisions to ensure standardisation across Delivery/Assessment staff and consistency and fairness of assessment following Awarding Organisation requirements.

SFEDI Awards provides quality assurance documentation that can be used by the centre for recording quality assurance decisions. We have provided templates which can be used within the annex of this document or alternatively they, and other templates, can be accessed on the [SFEDI Awards website](#). These documents are provided for the centre to use but, if the centre wishes to develop their own recording material, the minimum requirements must be met to ensure quality assurance practices are not disadvantaged. Minimum requirements can be accessed on the [SFEDI Awards website](#).

## Delivery/Assessment

SFEDI Awards centre staff should work with learners to ensure they understand the nature of the qualification and assessment approach. Both centre staff and the learner should agree at the beginning of the assessment journey how the assessment will be undertaken and what each can expect from the other, including arranging times and dates for learning and assessment activity and support. The Delivery/Assessment staff will follow the principles of plan, judge and feedback as described within professional standards.

SFEDI Awards provides assessment documentation that can be used by the centre for recording the planning, judging and feeding back of assessments. We have provided templates which can be used within the annex of this document or alternatively they, and other templates, can be accessed on the [SFEDI Awards website](#). These documents are provided for the centre to use but, if the centre wishes to develop their own recording

material, the minimum requirements must be met to ensure assessment practices are not disadvantaged. Minimum requirements can be accessed on the [SFEDI Awards website](#).

### Delivery/Assessment/Quality Assurance Staff Requirements

All Assessors must have the necessary competence in the subject matter of the qualification and the necessary competence in the assessment procedures to be used. See the table below to show whether the Assessor must hold the relevant qualification.

Qualification Title	Workplace Assessment	Other Training Environment, eg. classroom
D32/33	x	x
A1/A2	x	x
Level 3 Award in Understanding the Principles and Practices of Assessment	x	x
Level 3 Award in Assessing Competence in the Work Environment	x	x
Level 3 Award in Assessing Vocationally Related Achievement	x	x
Level 3 Certificate in Assessing Vocational Achievement	x	x

All Quality Assurance staff must have the necessary competence in the subject matter of the qualification and the necessary competence in the IQA procedures to be used. See the table below to show whether the IQA must hold the relevant qualification.

Qualification Title	Sufficient to Carry Out the IQA Role
D34	x
V1	x
Level 4 Award in Understanding the Internal Quality Assurance of Assessment Processes and Practice	x
Level 4 Award in Internal Quality Assurance of Assessment Processes and Practice	x
Level 4 Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practice	x

## Assessment Methods

The following provides examples and explanations of the most common forms of assessment methods. Other methods can be used by centres to enable learners to demonstrate they meet the standards as detailed within the units.

### Initial Assessment

Centres should complete an initial assessment with learners prior to the commencement of the qualification to ensure that the subject matter and level of the qualification is the most appropriate to meet their needs.

This initial assessment should also form part of the planning process so that the most appropriate methods of assessment are chosen to suit the learner and their learning environment whilst also meeting any mandatory assessment methods the qualification may contain.

### Mandatory Assessment Methods

Some units may require mandatory forms of assessment to be completed. SFEDI Awards will make note in each unit whether mandatory assessment methods apply. If it states that there are no mandatory assessment methods, a suggestion of the types of assessments that could be used will be provided.

### Expert Witness/Witness Testimony

These are provided by external people as the Delivery/Assessment staff cannot possibly be present at all times when a learner completes a task that could be used as evidence. The testimony will be expected to detail who and what the activity entailed and where the activity took place. A template for the collection of a witness testimony has been provided later within this document.

### Observation

This is a recorded report of an observed activity to show who and what the activity entailed and where the activity took place. It is normally recorded by the Delivery/Assessment staff and should be planned for. On occasions the opportunity may arise for a naturally occurring observation but this must not be seen as common practice. A template for the collection of an observation has been provided later within this document.

### Product Evidence

This is a work product, for example a letter or research, that has been produced which can support the evidencing of performance. When using this form of evidence it is important to ensure that confidentiality is adhered to and no information is provided that may compromise this. It may be appropriate to reference the location of product evidence within

a professional discussion so that, if the quality assurer wishes to view it, then they can request a copy. A template for the collection of product evidence has been provided later within this document.

## Professional Discussion

This is a recorded report of a discussion between the learner and the Delivery/Assessment staff and should give real examples, where possible, of activity completed. It is normally recorded by the Delivery/Assessment staff and should be planned for. A Professional Discussion is not a question and answers session and should be led by the learner. A template for the collection of a professional discussion has been provided later within this document.

## Recognition of Prior Learning

Prior Learning can form part of the assessment process where the learner is able to demonstrate that they meet the assessment requirements for a unit through knowledge, understanding or skills that they already possess. In this instance the learner must provide evidence to show that the assessment criteria have been met.

The Assessor will make a professional judgement about the evidence presented, which could be in a variety of forms, including, a statement or professional discussion to explain what prior activity has taken place and how this links to the standards to be achieved. The assessment process for Recognition of Prior Learning should be rigorous, reliable and fair.

For full details of how recognition of prior learning can be used within SFEDI Awards qualifications please see the [SFEDI Awards website](#).

## Simulation

In exceptional circumstances evidence from simulation can be used to complement the primary evidence drawn from business enterprise activities. Simulation should only occur where:

- ✓ The candidate would otherwise be precluded from providing the necessary evidence for demonstrating they met the requirements of the standards because of the nature of their business or business idea

Simulated activities should match as closely as possible those that occur in a real business environment. This is particularly important where these activities and their outcomes are being assessed to provide evidence to demonstrate the candidate is meeting the requirements of the standards. If simulation is to be used, prior agreement as to the arrangements must be sought from SFEDI Awards prior to the assessment taking place.

Activities should take place in a realistic working environment that:

- ✓ Is based on business enterprise activities, events, challenges and markets

- ✓ Includes a comprehensive range of demands, activities, constraints and challenges typical of those that would be met in a real business enterprise
- ✓ Gives candidates access to facilities, advice and support that would be normal for the business enterprise activity, event or type of challenge represented
- ✓ Places candidates under pressures of time, resources and access to support that would be normal in a business enterprise
- ✓ Is organised and managed as would a real business enterprise situation
- ✓ Is subject to normal workplace controls regarding health and safety, equal opportunities, and codes of conduct

## Authentication of Learner Evidence

Centres must have knowledge and certainty that all assessments undertaken are entirely the work of the learner being assessed and a statement of authenticity signed by the learner and Assessor must be present within the portfolio. A template to record this statement has been provided later within this document.

## Feedback

Feedback must be provided to the learner for each assessment carried out and recorded on the assessment documentation and should feed into both assessment planning and the completion of progress reviews. The feedback should provide the learner with information relating to:

- ✓ Whether the planned assessment has been completed
- ✓ The quality of the assessment completed
- ✓ What has been covered within the standards
- ✓ What is required to be completed to move the qualification forward

Templates to support the planning and feedback functions have been provided later within this document.

## Data Protection and Confidentiality

Many of the potential assessment methods that could be used in order to support the delivery of a qualification may lead to the inadvertent collection of data and confidential information, for example where a piece of product evidence has been gathered.

In these instances both the learner and the centre should take all reasonable steps to ensure that data protection and confidentiality legislation and policies are followed and data that should not be released within the public domain is protected.

## Protection of Minors in Evidence Collection

Where video or photography is used in order to collect evidence for the completion of a qualification, care should be taken where minors (those under 18) are included within. Both the learner and the centre have responsibility for ensuring child protection legislation and policies are followed and that minors are not put at risk.

If a minor is included within video and/or photographic evidence it is the responsibility of the centre to inform the learner of:

- ✓ The requirement to obtain the permission from the minor's parent or guardian prior to collecting the evidence
- ✓ The purpose of the restrictions that are in place when making use of video and/or photographic evidence
- ✓ The requirement to retain evidence for the purpose of quality assurance and the timeframe that evidence will be retained
- ✓ The requirement to store video and/or photographic evidence securely
- ✓ The associated child protection legislation

## Unit Structure

The following demonstrates the structure of units within SFEDI Awards qualifications:

Unit Reference Number	Unit Title
<b>Unit Status</b>	This will show whether the unit is mandatory or optional
<b>Unit Level</b>	Level allocated to the unit on the RQF unit databank
<b>Credit Value</b>	Credit value assigned to the unit
<b>Guided Learning</b>	Learning hours required to complete the unit under the guidance of a lecturer, supervisor or tutor whether through physical presence or electronic means

### Unit Overview and Main Outcomes

This will provide you with the rationale for the unit and the knowledge and skills the learner will develop by undertaking the unit.

### Assessment and Grading of This Unit

This will provide you with the grading structure for the unit and also will list the mandatory and/or suggested assessment methods for use in the completion of the unit.

### Unit Content

This will provide you with the learning outcomes and assessment criteria that the learner must provide evidence for in order to complete the unit.

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
This shows what the learner needs to know, understand or do	This sets out the criteria the learner must meet and provide evidence against in order to complete the unit



## Qualification Unit Details

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The following pages contain the units that are contained within this qualification

## People Management

The following units aim to support the development of those skills required to manage people appropriately within a business from recruitment to the development of knowledge and skills within colleagues and self.

## A/506/7084    The Entrepreneurial Mindset

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    5

**Guided Learning**            30 hours

### **Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Understand what is meant by entrepreneurship
- ✓ Be able to develop an entrepreneurial skills set

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand what is meant by entrepreneurship	1.1	Explain what is meant by the term entrepreneurship
		1.2	Explain the difference between being entrepreneurial and being enterprising
		1.3	Identify the skills required by entrepreneurs within a business environment
		1.4	Explain the importance of the skills identified for the entrepreneur within a business environment
		1.5	Identify the need for entrepreneurs to take risks
		1.6	Describe the effect upon business of entrepreneurial activities
2	Be able to develop an entrepreneurial skills set	2.1	Complete a skills scan on own entrepreneurial skills against those identified earlier
		2.2	Identify areas for improvement
		2.3	Plan activities for own improvement against the areas identified taking into account: <ul style="list-style-type: none"> <li>✓ area to be improved</li> <li>✓ activity to be completed</li> <li>✓ timescales for activity to take place</li> <li>✓ method of reviewing the outcome of the activity</li> </ul>

## F/503/7505      Developing the Mindset and Skills Required for Enterprise

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**Unit Status**              Optional

**Unit Level**                3

**Credit Value**            5

**Guided Learning**       30 hours

### **Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the mindset and skills required to be a successful entrepreneur
- ✓ Understand the mindset and skills required to be a successful intrapreneur
- ✓ Understand how enterprising skills contribute to business success

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the mindset and skills required to be a successful entrepreneur	1.1	Appreciate the emotional investment entrepreneurs make in their business
		1.2	Identify the competing demands of running a small business
		1.3	Explain what is involved to successfully start and run a small business
		1.4	Identify the need for entrepreneurs to take risks
		1.5	The diverse capabilities required of entrepreneurs
		1.6	Recognise that running a business takes a lot of time, energy and commitment
2	Understand the mindset and skills required to be a successful intrapreneur	2.1	Explain why a focus on creativity, innovation and problem solving are important for intrapreneurs
		2.2	Analyse why enhanced collaborative working skills may be so important to intrapreneurs
3	Understand how enterprising skills contribute to business success	3.1	Explain how enterprise skills may be used within a business
		3.2	Explain how the use of enterprise skills may impact on business success

D/508/3018

## Manage Own Professional Development Within an Organisation

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 20 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Be able to assess own career goals and personal development
- ✓ Be able to set personal work objectives
- ✓ Be able to produce a personal development plan
- ✓ Be able to implement and monitor own personal development plan

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to assess own career goals and personal development	1.1	Identify own career and personal goals
		1.2	Assess how own career goals affect work role and professional development
2	Be able to set personal work objectives	2.1	Agree SMART (Specific, Measurable, Achievable, Realistic and Time-bound) personal work objectives in line with organisational objectives
3	Be able to produce a personal development plan	3.1	Identify gaps between objectives set, own current knowledge and skills
		3.2	Produce a development plan
4	Be able to implement and monitor own personal development plan	4.1	Plan activities identified in own development plan
		4.2	Explain how to monitor and review own personal development plan



**A/503/8877      Assess Personal Abilities to Run a Business**

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    2

**Guided Learning**            16 hours

**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Assess the skills, abilities and attributes needed for setting up and running a business
- ✓ Review own ability to deal with potential changes to a business
- ✓ Set and monitor performance targets for a business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to assess the skills, abilities and attributes needed for setting up and running a business	1.1	Identify the skills, abilities and personal attributes needed for setting up and running a business
		1.2	Assess own skills, abilities and attributes with those needed to identify strengths and areas for development
2	Be able to review own ability to deal with potential changes to a business	2.1	Identify the changes in the business environment which could impact upon development of own business
		2.2	Assess the implications of changes in own business for personal skills and abilities
		2.3	Review the advantages and disadvantages of the ways of developing the abilities to deal with potential changes to the business
		2.4	Identify others who could support the development of personal abilities to deal with changes to the business
3	Be able to set and monitor performance targets for a business	3.1	Review the performance targets required for own business to meet business needs
		3.2	Plan what sources of information can be used to assess progress against performance targets
		3.3	Establish review dates to monitor progress against performance targets for own business
		3.4	Develop a plan to address actions required from reviewing progress of own business against performance targets

M/615/4765

Develop and Maintain Professional Networks

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**Unit Status** Optional**Unit Level** 3**Credit Value** 3**Guided Learning** 15 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the principles of effective networking
- ✓ Be able to identify professional networks for development
- ✓ Be able to maintain professional networks

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

**Unit Content**

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
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
		3.4	Establish the boundaries of confidentiality
		3.5	Agree guidelines for the exchange of information and resources
		3.6	Take action to ensure that participation in networks reflects current and defined future aspirations and needs
		3.7	Make introductions to people with common or complementary interest to and within networks

H/508/3022

## Support Learning and Development Within Own Area of Responsibility

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 5

**Guided Learning** 25 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Be able to identify the learning needs of colleagues in own area of responsibility
- ✓ Understand how to develop a learning environment in own area of responsibility
- ✓ Be able to support colleagues in learning and its application
- ✓ Be able to evaluate learning outcomes and future learning and development of colleagues

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to identify the learning needs of colleagues in own area of responsibility	1.1	Identify gaps between requirements of colleagues' current or future work roles and their existing knowledge, understanding and skills
		1.3	Support colleagues to produce personal development plans in their areas of responsibility
2	Understand how to develop a learning environment in own area of responsibility	2.1	Explain the benefits of continual learning and development
		2.2	Identify how learning opportunities can be provided for own area of responsibility
3	Be able to support colleagues in learning and its application	3.1	Identify information, advice and guidance to support learning
		3.2	Communicate to colleagues to take responsibility for their own learning
		3.3	Explain to colleagues how to gain access to learning resources
		3.4	Support colleagues to practise and reflect on what they have learned
4	Be able to evaluate learning outcomes and future learning and development of colleagues	4.1	Identify whether the learning activities undertaken have achieved the desired outcomes
		4.2	Support colleagues when updating their personal development plan

A/508/0708

Delivering Learning Activities

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**Unit Status** Optional**Unit Level** 3**Credit Value** 6**Guided Learning** 30 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Be able to create an environment conducive to learning
- ✓ Be able to place and deliver a learning activity for individuals and groups
- ✓ Know how to evaluate learning activities

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to create an environment conducive to learning	1.1	Explain the individual and environmental factors that impact positively or negatively on a learning environment
		1.2	Take steps to create a positive learning environment
2	Be able to plan and deliver a learning activity for individuals and groups	2.1	Identify the aims and objectives of the learning activity
		2.2	Identify appropriate methods of delivery which meet the aims and objectives of the learning activity
		2.3	Select the most appropriate method of delivery that will meet the needs and learning styles of learners and can be carried out using the available resources
		2.4	Write a delivery plan which meets the aims of the learning activity and the individual needs of the learners
		2.5	Deliver the learning activity
		2.6	Support learners through questioning and feedback
		2.7	Demonstrate good practice in the delivery of the learning activity
		2.8	Summarise and conclude the learning and development activity
3	Know how to evaluate learning activities	2.9	Assist learners to reflect on their learning and identifying further development needs
		3.1	Obtain and analyse participant feedback
		3.2	Reflect on and evaluate effectiveness of own performance
		3.3	Make recommendations for future improvement



D/508/0703

## Understand a Business and the Role of People Management

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 20 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the aims and objectives of a business and the environment it operates in
- ✓ Understand the structure, culture and functions of a business
- ✓ Understand how people management activities support a business

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the aims and objectives of a business and the environment it operates in	1.1	Describe the products and services of a business
		1.2	Identify the business' customers and define their needs
		1.3	Describe the goals, targets and financial structure of the business
		1.4	Describe the current trends within the economy that could affect the business in terms of the following influences: <ul style="list-style-type: none"> <li>• political</li> <li>• economic</li> <li>• sociological</li> <li>• technological</li> <li>• legal</li> <li>• environmental</li> </ul>
2	Understand the structure, culture and functions of a business	2.1	Describe the structure and functions of a business
		2.2	Explain how different functions work together to optimise performance
		2.3	Assess how the culture of a business can affect its operation
3	Understand how people management activities support a business	3.1	Analyse how people management activities support a business' strategy
		3.2	Explain the role of people management practitioners in supporting line managers and their staff

Y/508/0702

## Evaluate and Develop Own Practices in People Management

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 20 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand what is required to be an effective people manager
- ✓ Know how to deliver timely and effective people management services to meet business and staff member needs
- ✓ Be able to reflect on personal and professional skills and be able to implement and maintain a personal development plan

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand what is required to be an effective people manager	1.1	Explain the knowledge, skills and behaviours required by those working in people management
		1.2	Explain what is required to be effective in an identified people management role
2	Know how to deliver timely and effective people management services to meet business and staff members needs	2.1	Identify the users of people management services within a business and the needs of those users
		2.2	Explain how own time is managed effectively in order to manage potential conflicting needs and priorities
		2.3	Analyse different methods of communicating and when it may be appropriate to use each method
		2.4	Describe how to build and maintain good relationships to support effective service delivery
		2.5	Identify opportunities for continuous improvement in service delivery in a business and recommend improvements
3	Be able to reflect on personal and professional skills and be able to implement and maintain a personal development plan	3.1	Explain what is meant by continuing professional development (CPD) and why it is important
		3.2	Carry out an audit on own knowledge, behaviours and skills against those identified to deliver an effective people management service
		3.3	Identify own development needs
		3.4	Evaluate the options for development and explain the benefits and disadvantages of each
		3.5	Produce a plan to meet identified personal development needs
		3.6	Reflect on performance against the plan, identify ongoing learning needs and revise the plan accordingly

## F/508/3027      Develop Working Relationships with Colleagues

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**Unit Status**                      Optional

**Unit Level**                      3

**Credit Value**                      3

**Guided Learning**              15 hours

### Unit Overview and Main Outcomes

This unit contains 5 learning outcomes which will support the learner to be able to:

- ✓ Understand the benefits of working with colleagues
- ✓ Be able to establish working relationships with colleagues
- ✓ Be able to act in a professional and respectful manner when working with colleagues
- ✓ Be able to communicate with colleagues
- ✓ Be able to identify potential work-related difficulties and explore solutions

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the benefits of working with colleagues	1.1	Analyse the benefits of productive working relationships
2	Be able to establish working relationships with colleagues	2.1	Identify colleagues within own and other organisations
		2.2	Agree the roles and responsibilities for colleagues
3	Be able to act in a professional and respectful manner when working with colleagues	3.1	Explain how to display behaviour that shows professionalism
4	Be able to communicate with colleagues	4.1	Identify information to others clearly and concisely
		4.2	Explain how to receive and clarify own understanding of information
5	Be able to identify potential work-related difficulties and explore solutions	5.1	Describe potential work-related difficulties and conflicts of interest
		5.2	Analyse the methods that could be used to resolve identified potential difficulties

## K/615/3324     Preparing for the Role of a Mentor

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    2

**Guided Learning**            8 hours

### **Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the skills and tools required by a mentor
- ✓ Develop their own skills
- ✓ Understand the legal and ethical requirements of mentoring

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

There are three mandatory assessment methods for this unit:

- ✓ Witness testimonial to show that the learner can demonstrate the skills required for mentoring. This can be from the mentoring organisation or from the Assessor
- ✓ Guided knowledge discussion
- ✓ Continuous Professional Development plan

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the skills and tools required by a mentor	1.1	Describe how good communication is essential to the role of a mentor
		1.2	Explain why a mentor must have good listening skills
		1.3	Identify types of question that can be used in the mentoring process
		1.4	Describe how each type of question can be used
		1.5	Identify a suitable feedback model
		1.6	Explain why it is important to use the feedback model identified
		1.7	Describe how reflective practice can be used in the mentoring process
		1.8	Explain the importance of assisting the mentee to problem solve
		1.9	Describe why the mentor must be a good role model
		1.10	Describe the function of the following documentation: a) action plans b) feedback forms
		1.11	Explain why it is essential to select a suitable venue for the mentoring meeting
2	Be aware of how to develop own mentoring skills	2.1	Identify the skills relevant to the role of a mentor
		2.2	Identify own personal skills relevant to the role of a mentor
		2.3	Identify development activities that could be undertaken to develop the skills identified
3	Understand the legal and ethical requirements of mentoring	3.1	Describe what is meant by the boundaries of a mentor's role
		3.2	Identify legislation that is important to the role of a mentor
		3.3	Identify the importance of mutual trust and respect between the mentor and mentee
		3.4	Describe a potential barrier to an effective mentor/mentee relationship and how it could be overcome
		3.5	Explain why the mentor must consider health and safety issues when setting up a mentoring intervention



		3.6	Explain why the mentor must consider personal safety issues when setting up a mentoring intervention
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M/508/1712

## The Role of HR in Encouraging Innovation and Creativity Within Business

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 3

**Guided Learning** 30 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand what is meant by innovation and creativity
- ✓ Understand how a culture of innovation and creativity is developed within an organisation
- ✓ Understand how the HR function can support the development of a culture of innovation and creativity

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand what is meant by innovation and creativity	1.1	Describe what is meant by the terms innovation and creativity
2	Understand how a culture of innovation and creativity is developed within an organisation	2.1	Explain how organisational structures can impact on innovation and creativity within an organisation
		2.2	Explain how the processes and procedures within an organisation can impact on innovation and creativity
		2.3	Compare an organisation of own choice with the structure and processes and procedures identified
		2.4	Suggest changes that could be made to the organisation in order to encourage a culture of innovation and creativity
3	Understand how the HR function can support the development of a culture of innovation and creativity	3.1	Identify the standard functions of the HR role within an organisation
		3.2	Analyse how these standard functions can stifle the creation of a culture of innovation and creativity
		3.3	Suggest changes that could be made to the standard HR functions in order to promote the creation of a culture of innovation and creativity within an organisation

R/508/0701

## Managing Personal Information within a Business

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 2

**Guided Learning** 10 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand what data needs to be collected to support people management practices within a business
- ✓ Know how people's personal information should be recorded, managed and stored within a business
- ✓ Be able to analyse people's personal information and present findings to inform decision making within a business

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand what data needs to be collected to support people management practices within a business	1.1	Explain why a business needs to record and manage people's data
		1.2	Identify the range of data that is collected
		1.3	Explain how this data supports people management practices
2	Know how people's personal information should be recorded, managed and stored within a business	2.1	Describe the benefits of different systems of recording and storing records
		2.2	Explain the importance of having effective systems for inputting and retrieving information
		2.3	Explain legal requirements relating to the recording, storing and accessibility of people's data
3	Be able to analyse people's personal information and present findings to inform decision making within a business	3.1	Retrieve, analyse and interpret personal data
		3.2	Present findings in a clear and concise manner to inform decision making

H/508/0704

Recruiting People for a Business

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**Unit Status** Optional**Unit Level** 3**Credit Value** 6**Guided Learning** 30 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the influencing factors that affect the selection and recruitment of staff
- ✓ Understand the processes involved in the selection and recruitment of staff
- ✓ Be able to contribute to the recruitment and selection interviewing process for a job role
- ✓ Understand the importance of an effective induction programme

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the influencing factors that affect the selection and recruitment of staff	1.1	Identify the influencing factors that affect a business' approach to recruiting skilled employees
		1.2	Analyse the affect the influencing factors can have on the selection and recruitment of staff
		1.3	Explain the advantages a diverse workforce can have on the operations and success of a business
2	Understand the processes involved in the selection and recruitment of staff	2.1	Explain the advantages and disadvantages of different methods of recruitment
		2.2	Explain the advantages and disadvantages of different methods of selection
3	Be able to contribute to the recruitment and selection interviewing process for a job role	3.1	Explain the reasons for recruiting to an identified role
		3.2	Source relevant information to write a job description and person specification for the role
		3.3	Draft a job advertisement to attract suitable individuals to apply for the role
		3.4	Shortlist candidate applications for interview
		3.5	Participate in a selection interview and be involved in the decision making process for the role
		3.6	Identify the records that need to be kept following the selection process and compose letters of appointment and non-appointment for the role
4	Understand the importance of an effective induction programme	4.1	Explain the importance of an induction programme for a business
		4.2	Identify the areas to be covered in induction and the roles of those involved in the process

T/508/0707

## Managing Employees and their Rights

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	6
<b>Guided Learning</b>	30 hours

**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the impact of employment law at the start of the employment relationship
- ✓ Understand the main individual rights that the employee has during the employment relationship
- ✓ Understand disciplinary and redundancy procedures

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the impact of employment law at the start of the employment relationship	1.1	Describe the internal and external factors that impact on the employment relationship
		1.2	Explain the different types of employment status
		1.3	Analyse the reasons why it is important to determine an individual's employment status
2	Understand the main individual rights that the employee has during the employment relationship	2.1	Explain the importance of work life balance within the employment relationship and how it can be influenced by legislation
		2.2	Explain why it is important to treat employees fairly in relation to pay
		2.3	Describe the main points of discrimination legislation
		2.4	Explain the importance of complying with legislation relating to employment
3	Understand disciplinary and redundancy procedures	3.1	Describe people's rights in the workplace and their entitlement to grievance processes
		3.2	Explain what steps should be included in a grievance process
		3.3	Explain what steps should be included in a disciplinary process
		3.4	Explain the types of follow up actions required at each stage of a disciplinary process by managers and employees
		3.5	Identify ways in which an employment contract can be legally terminated
		3.6	Describe the basis on which staff may be made redundant
		3.7	Explain what steps should be followed for staff redundancies

L/508/1703

Digital and Information Technologies for HR

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**Unit Status** Optional**Unit Level** 3**Credit Value** 3**Guided Learning** 30 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Understand the use and scope of digital and information technologies in business
- ✓ Understand the impact and influence of digital and information technologies on the HR function

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the use and scope of digital and information technologies in business	1.1	Assess the uses of digital and information technologies in modern business practice and e-business
		1.2	Outline the requirements relating to digital and information technologies in business
		1.3	Identify the advantages of using digital and information technologies in business
		1.4	Assess the disadvantages and risks of using digital and information technologies in business
2	Understand the impact and influence of digital and information technologies on the HR function	2.1	Explain how digital and information technologies can enhance the HR function
		2.2	Outline the contribution of digital and information technologies to learning and development
		2.3	Assess the impact of these new technologies in the workplace
		2.4	Assess the impact of these new technologies on recruitment and selection
		2.5	Explain how digital and information technologies can influence prospective employee and remote employee perception of a business

## M/506/8331 Understand Age Diversity Management

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 2

**Unit Learning hours** 12

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the effects of changes in population demographics in the world of work
- ✓ Understand the principles of age management in a business
- ✓ Understand the effects of legislation on age diversity practices in a business

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the effects of changes in population demographics in the world of work	1.1	Describe the key trends in demographic changes to populations
		1.2	Assess the implications of trends in demographic changes for the workplace
		1.3	Assess the implications of trends in demographic changes for the workforce
2	Understand the principles of age management in a business	2.1	Describe the different perspectives on the concept of age including physical-cognitive, subjective-social, relative-normative and occupational age
		2.2	Describe the benefits of an age diverse workforce
		2.3	Explain the values, characteristics and motivations of the different generations in a workforce
		2.4	Assess the impact of generational diversity on age management in a business
3	Understand the effects of legislation age diversity practices in a business	3.1	List the laws which have an effect on age diversity practices in a business
		3.2	Describe the strategies which can be used to manage age diversity within legal frameworks
		3.3	Assess the opportunities and challenges of using legal frameworks for managing age diversity in a business

## T/506/8332 Assess Age Diversity Management in a Business

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 2

**Guided Learning** 12 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Be able to undertake a SWOT analysis of a business to manage age diversity
- ✓ Be able to assess the capability of a business to manage age diversity
- ✓ Be able to assess personal capabilities to manage age diversity

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to undertake a SWOT analysis of a business to manage age diversity	1.1	Document the strengths and weaknesses of own business in managing age diversity
		1.2	Document the opportunities and threats to own business in managing age diversity
		1.3	Develop a plan to prioritise the actions required in own business in managing age diversity
2	Be able to assess the capability of a business to manage age diversity	2.1	Assess the implications for leadership and management time in managing age diversity in own business
		2.2	Review the suitability of recruitment and people management processes in managing age diversity in own business
		2.3	Review the implications for learning and development activity in managing age diversity in own business
3	Be able to assess personal capabilities to manage age diversity	3.1	Map strengths and areas for development in own knowledge and skills in managing age diversity
		3.2	Evaluate own experiences and confidence in managing age diversity
		3.3	Develop personal strategies for managing staff from different generations
		3.4	Identify sources of advice and guidance internal and external to own business to support managing age diversity

## K/506/8330      Develop a Plan for Age Diversity Management

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**Unit Status**                      Optional

**Unit Level**                      3

**Credit Value**                      2

**Unit Learning hours**    12

### **Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Be able to develop a plan for managing age diversity in a business
- ✓ Be able to use a plan for managing age diversity in a business

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to develop a plan for managing age diversity in a business	1.1	Identify the key elements of a plan for managing age diversity for a business
		1.2	Plan how to collect the information to assist in the development of a plan for managing age diversity for own business
		1.3	Outline how to work with others internal and external to own business to develop a plan for managing age diversity
2	Be able to use a plan for managing age diversity in a business	2.1	Identify the ways in which a plan for managing age diversity will be used in own business
		2.2	Develop a strategy for engaging with others in the use of the plan for managing age diversity in own business
		2.3	Identify ways of communicating the key elements of the plan for managing age diversity to staff and external stakeholders of own business
		2.4	Identify indicators by which to review progress in own business against the plan for managing age diversity

R/508/1699

## Managing the Risk of Aggressive and Challenging Behaviour in the Workplace

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 3

**Guided Learning** 30 hours

### Unit Overview and Main Outcomes

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Understand behaviour that indicates an escalation towards aggressive and violent behaviour in the workplace
- ✓ Be able to take appropriate measures to avoid, decelerate and/or de-escalate aggressive or violent situations in the workplace

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand behaviour that indicates an escalation towards aggressive and violent behaviour in the workplace	1.1	Define, using examples, workplace aggression and violence
		1.2	Describe the legal and ethical responsibilities of employers and employees in managing the risk of escalation of aggressive and/or violent behaviour in the workplace
		1.3	Identify an appropriate intervention for each level of behaviour
2	Be able to take appropriate measures to avoid, decelerate and/or de-escalate aggressive or violent situations in the workplace	2.1	Describe elements of good interpersonal behaviour and demonstrate how non-verbal strategies can be used to decelerate aggressive or violent behavioural responses
		2.2	Describe typical verbal behaviour associated with aggressive or violent situations and demonstrate the use of verbal deceleration and de-escalation techniques
		2.3	Explain the importance of effective listening
		2.4	Identify key approaches associated with empathetic listening
		2.5	Explain how precipitating factors for aggressive or violent behaviour impact on staff and service users
		2.6	Explain how the continued importance of professional values ensures the care, welfare, safety and security of all those involved in an aggressive or violent situation

## Innovation and Creativity

The following units aim to support the development of those skills required to promote innovation and creativity within business. To support the survival and growth of business both staff and managers are required to be forward thinking and embrace innovation and creativity.

## J/506/7086      The Role of Innovation and Creativity to Growth Within Business

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**Unit Status**              Optional

**Unit Level**                3

**Credit Value**            7

**Guided Learning**       40 hours

### **Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand what is meant by innovation and creativity
- ✓ Understand how a culture of innovation and creativity is developed within an organisation
- ✓ Understand how innovation and creativity contributes to business growth
- ✓ Understand how competition can support a culture of innovation and creativity

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand what is meant by innovation and creativity	1.1	Describe what is meant by the terms innovation and creativity
2	Understand how a culture of innovation and creativity is developed within an organisation	2.1	Explain how organisational structures can impact on innovation and creativity within an organisation
		2.2	Explain how the processes and procedures within an organisation can impact on innovation and creativity
		2.3	Compare own organisation with the structure and processes and procedures identified
		2.4	Suggest changes that could be made to own organisation in order to encourage a culture of innovation and creativity
3	Understand how innovation and creativity contributes to business growth	3.1	Describe different ways in which an organisation can grow and develop
		3.2	Explain how innovation and creativity can impact on the growth and development of a business
		3.3	Describe what is meant by opportunity scouting
		3.4	Explain how business idea generation can be supported through opportunity scouting and innovation and creativity
4	Understand how competition can support a culture of innovation and creativity	4.1	Explain how a competitive business environment can support an organisation to adopt a culture of innovation and creativity

T/615/4766

Contribute to Innovation in Business

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	6
<b>Guided Learning</b>	25 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the purpose and benefits of innovation in a business environment
- ✓ Understand how to research, develop and review ideas for new approaches and solutions
- ✓ Understand how to present suggestions for new approaches and solutions

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the purpose and benefits of innovation in a business environment	1.1	Evaluate the purpose of innovation as a way of staying competitive and offering new solutions
		1.2	Explain the purpose of questioning existing ways of working and assumptions about them
2	Understand how to research, develop and review ideas for new approaches and solutions	2.1	Explain the purpose of reviewing existing products and services, and ways of doing so
		2.2	Evaluate ways of reviewing existing products and services
		2.3	Identify sources of information for new approaches and solutions
		2.4	Describe ways of collecting information on possible improvements
		2.5	Explain the purpose of working with others when developing new approaches and solutions
		2.6	Explain the purpose and benefits of working with others when agreeing how to present ideas to decision-makers
		2.7	Evaluate how to work with others to develop and agree an idea
		2.8	Explain the purpose and benefits of acknowledging contributions made by others
		2.9	Explain how to evaluate ideas, including cost / benefit and impact analysis
		2.10	Explain how to question assumptions to develop concepts and propositions
		2.11	Explain the purpose of reviewing and learning from mistakes



K/508/0705

Supporting Change Within a Business

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**Unit Status** Optional**Unit Level** 3**Credit Value** 3**Guided Learning** 15 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand why a business may need to change and how this can affect its operations
- ✓ Understand the key factors involved in the change process and the different ways change can be managed
- ✓ Understand the impact of change on people within a business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand why a business may need to change and how this can affect its operations	1.1	Explain why a business may need to change
		1.2	Describe the internal and external factors that may cause a business to change
		1.3	Explain how change can impact on how a business operates
2	Understand the key factors involved in the change process and the different ways change can be managed	2.1	Explain the main factors involved in the change process
		2.2	Analyse different approaches to managing change
3	Understand the impact of change on people within a business	3.1	Analyse the different behavioural responses people may demonstrate when a business is undergoing change
		3.2	Explain the role people management practitioners can play in supporting individuals and the business during a period of change

A/615/4767

Support Team Members in Identifying,  
Developing and Implementing New Ideas

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	4
<b>Guided Learning</b>	20 hours

**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Be able to develop team ideas and develop the creativity of team members
- ✓ Be able to assess the viability of team members' ideas
- ✓ Be able to support team members to implement ideas
- ✓ Be able to implement team ideas

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to develop team ideas and develop the creativity of team members	1.1	Encourage team members to identify ideas
		1.2	Record team members' ideas
2	Be able to assess the viability of team members' ideas	2.1	Assess with team members the potential benefits and risks associated with an idea and the resources required
3	Be able to support team members to implement ideas	3.1	Explain how to support team members in submitting formal proposals for approval
		3.2	Explain to team members how to identify and overcome barriers to implementing an idea
4	Be able to implement team ideas	4.1	Monitor the implementation of ideas by own team
		4.2	Communicate the progress of implementation to other relevant people within own organisation

**F/615/4768      Innovation and Growth Using Social Media**

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**Unit Status**                      Optional

**Unit Level**                      3

**Credit Value**                      5

**Guided Learning**              30 hours

**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand how social media contributes to innovation and growth in organisations
- ✓ Understand the social media channels that can be used by organisations to support innovation and growth
- ✓ Understand the legalities and etiquette to be considered by an organisation in the use of social media
- ✓ Understand how to measure the success of using social media

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how social media contributes to innovation and growth in organisations	1.1	Explain the role of social media in innovation and growth in organisations
		1.2	Identify the importance of recent developments to social media technologies in relation to innovation and growth in organisations
		1.3	Explain how social media can support the building of an organisations brand and presence within the marketplace
2	Understand the social media channels that can be used by organisations to support innovation and growth	2.1	Identify the social media channels available for use by an organisation
		2.2	Describe the benefits and shortfalls of each of the channels identified
		2.3	Explain how an organisation would select the most appropriate channel to use for a group of customers or particular market
3	Understand the legalities and etiquette to be considered by an organisation in the use of social media	3.1	Describe the risks of using social media to the brand and public perception of an organisation
		3.2	Identify an example of how social media has been used ineffectively and so damaged the brand and/or reputation of an organisation
		3.3	Explain how the organisation could have dealt with the situation in a more effective and positive manner
		3.4	Explain why it is important for an organisation to have a social media policy and guidelines
		3.5	Explain the importance of an organisation having a reputation management policy
4	Understand how to measure the success of using social media	4.1	Explain the importance of measuring the outcomes of using different social media channels
		4.2	Describe the methods an organisation can use to measure the success of the use of different social media channels

J/615/4769

## Using Customer Relationship Management to Support Innovation and Growth

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 5

**Guided Learning** 30 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand how customer relationship management contributes to innovation and growth
- ✓ Understand the impact of ICT on customer relationship management
- ✓ Be able to develop innovative customer relationship management strategies

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how customer relationship management contributes to innovation and growth	1.1	Evaluate the suitability of approaches to customer relationship management in relation to how they support innovation and growth within business
		1.2	For a business of own choice, examine its customer base
		1.3	Examine how the business uses customer relationship management in order to support innovation and growth
2	Understand the impact of ICT on customer relationship management	2.1	Analyse how ICT can support relationships with customers supporting innovation and growth
		2.2	Assess the extent to which ethical and privacy issues with ICT in customer relationships limits a business' innovation and growth
3	Be able to develop innovative customer relationship management strategies	3.1	For a business of own choice, identify the advantages and disadvantages of their current customer relationship strategy in relation to innovation and growth
		3.2	Make justified recommendations to improve the current customer relationship management strategy in order to support innovation and growth



F/615/4771

## Supporting Innovation and Growth Through Financial Management

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 40 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the importance of financial management for a business
- ✓ Understand how to identify financial requirements to support innovation and growth
- ✓ Understand the importance of accurate bookkeeping to financial management
- ✓ Be able to conduct a financial analysis

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the importance of financial management for a business	1.1	Define what is meant by financial management
		1.2	Explain the importance of financial management in meeting the objectives within a business
2	Understand how to identify financial requirements to support innovation and growth	2.1	Explain how a business calculates the estimated costs of activities, resources and overheads needed to achieve its objectives
		2.2	Analyse how a business' desire to innovate and grow can impact on the estimated costs identified
		2.3	Describe the factors that affect cash flow
		2.4	Explain how to manage temporary cash shortfalls to avoid longer term effects
3	Understand the importance of accurate bookkeeping to financial management	3.1	Describe how the process of bookkeeping supports financial management
		3.2	Describe how the chart of accounts support the preparation of a) financial accounts b) management accounts
4	Be able to conduct a financial analysis	4.1	Organise relevant data to complete a financial analysis of a business
		4.2	Use the data gathered to compare the financial performance of the business against the business's requirements
		4.3	Suggest improvements that could be made in order that the financial performance supports the business's requirements

# SFEDI<sup>®</sup>AWARDS

## Management

The following units aim to support the development of those skills required to effectively manage a business to ensure it runs smoothly ensuring both its survival and growth.

<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	6
<b>Guided Learning</b>	30 hours

**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the importance of the business environment
- ✓ Understand why an organisation needs to address external change
- ✓ Understand the effect of technological progress and developments on an organisation
- ✓ Understand the stages of business development

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the importance of the business environment	1.1	Explain what is meant by the business environment
		1.2	Explain how a PESTLE analysis can support an organisation in understanding their business environment
		1.3	Explain where a business could access information to help it complete a PESTLE analysis
		1.4	Describe the current trends within the economy that could affect a business in terms of the following influences: political economic sociological technological legal environmental
2	Understand why an organisation needs to address external change	2.1	Describe the ways in which an organisation might react to external change
		2.2	Assess possible consequences for own business of not adapting to address external change
3	Understand the effect of technological progress and developments on an organisation	3.1	Describe how technological progress and developments can have an impact on an organisation
		3.2	Assess the possible consequences for own business of not engaging with technological progress and developments
4	Understand the stages of business development	4.1	Explain the four main stages of business development and the needs and requirements of an organisation at each stage
		4.2	Explain the role of market segmentation and its implication for new product development and modification

## H/503/7500 Leadership and Teamwork

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 10

**Guided Learning** 60 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the importance of teams
- ✓ Understand leadership attributes and skills
- ✓ Contribute effectively as a team member and leader
- ✓ Assess effectiveness of team performance

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the importance of teams	1.1	Describe the advantages and disadvantages of team working
		1.2	Explain the importance of team working and how actions can affect others
		1.3	Identify the factors that can contribute to a team's success
		1.4	Identify the different roles and responsibilities within a team
		1.5	State the stages normally encountered in the life of a team
		1.6	Describe working relationships in teams and the personal skills and behaviour required for effective team working
2	Understand leadership attributes and skills	2.1	Explain the difference between leadership and management
		2.2	Evaluate the impact of different leadership styles on individuals and work outputs
		2.3	Explain skills and behaviour required for successful leadership
3	Be able to contribute effectively as a team member and leader	3.1	Use appropriate skills and behaviour when working as part of a team and when acting as a leader
		3.2	Assess own contribution to achieving team goals
		3.3	Analyse their role within the group and negotiate their strengths with other group members, identifying improvements which could be made to their working practice
		3.4	Review personal skills and their suitability for leadership and teamwork and plan improvement
4	Be able to assess effectiveness of team performance	4.1	Analyse the performance of the team against team objectives
		4.2	Analyse and evaluate a range of changes and improvements which could be made to enable the group to work together more effectively

Y/500/4591      Develop Your Business Idea

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    1

**Guided Learning**            10 hours

**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Demonstrate how to evaluate your business idea
- ✓ Demonstrate how to assess the market for your business idea

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Demonstrate how to evaluate your business idea	1.1	Evaluate the strengths, weaknesses, opportunities and threats of your business idea
		1.2	Explain what it is about your business idea (e.g. uniqueness, difference or new approach) which makes it likely to succeed when compared with other similar businesses
		1.3	Describe how the product or service might be presented and explain how the presentation will help secure business success
2	Demonstrate how to assess the market for your business idea	2.1	Review the potential for your business idea in the market, for example, possible market size, market segments etc
		2.2	Undertake a provisional assessment of the impact of existing competitors on your business idea
		2.3	Analyse how market and business trends might influence the success of your business idea

Y/508/5401 Prepare a Plan for a Business

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 2

**Guided Learning** 16 hours

**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Be able to start planning for a business
- ✓ Be able to develop a plan in running a business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

**Unit Content**

<b>Learning Outcome - The learner will:</b>		<b>Assessment Criterion - The learner can:</b>	
1	Be able to start planning for a business	1.1	Analyse the potential market position of own business
		1.2	Analyse the potential market image of own business
		1.3	Assess resource required to run own business
		1.4	Review own goals for business
2	Be able to develop a plan in running a business	2.1	Analyse the advantages and disadvantages of methods for developing a plan for own business
		2.2	Present ways in which business goals may be met for own business
		2.3	Produce a structure for own business plan
		2.4	Develop method for collecting feedback from others on structure for own business plan
		2.5	Implement any changes to own business plan based on feedback gathered

**F/503/8962      Produce and Implement a Business Plan**

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**Unit Status**              Optional**Unit Level**                3**Credit Value**            2**Guided Learning**        16 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Produce business plans for a business
- ✓ Present business plans for a business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to produce business plans for a business	1.1	Identify a format and order of contents for presentation of a business plan
		1.2	Produce a plan which shows the relationship between an opportunity, a business idea and requirements for own business
		1.3	Justify how operational, market and financial targets in own business plan can be met
2	Be able to present business plans for a business	2.1	Identify ways in which the business plan may be presented to others to attract support for own business
		2.2	Communicate the plan to others whose support is required to develop own business
		2.3	Review business plan using feedback from others whose support is required to develop own business

**F/503/8881      Estimate Financial Needs for a Business**

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    3

**Guided Learning**            24 hours

**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Evaluate financial options to fund a business
- ✓ Monitor income and expenditure against business objectives
- ✓ Monitor profit and loss for own business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to evaluate financial options to fund a business	1.1	Calculate the potential costs associated with setting up own business
		1.2	Evaluate the advantages and disadvantages of different ways of funding own business
		1.3	Justify how you will finance setting up and running of own business
2	Be able to monitor income and expenditure against business objectives	2.1	Produce a forecast of income and expenditure for own business
		2.2	Conduct a sensitivity analysis of income and expenditure for own business
		2.3	Review the advantages and disadvantages of different systems for monitoring income and expenditure for own business
		2.4	Justify choice of system for monitoring income and expenditure for own business
3	Be able to monitor profit and loss for own business	3.1	Develop ways of monitoring profit and loss for own business
		3.2	Produce a statement of projected gross and net profit for a twelve month period for own business
		3.3	Assess the costs and benefits of making use of professional advisers in monitoring profit and loss for own business

**Unit Status** Optional

**Unit Level** 3

**Credit Value** 2

**Guided Learning** 8 hours

### **Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the difference between resilience and continuity in a business context
- ✓ Understand the influences on business resilience
- ✓ Understand the benefits and impact of developing business resilience

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the difference between resilience and continuity in a business context	1.1	Describe the importance of being able to continue business operations in a business environment with high levels of uncertainty
		1.2	Explain what constitutes resilience in a business context
		1.3	Explain what constitutes business continuity
2	Understand the influences on business resilience	2.1	Assess the events in the external business environment which impact on the ability to offer a continuous business service
		2.2	Assess the events in the external business environment which impact on the ability to offer a continuous business service
		2.3	Evaluate the responses required to develop resilience in a business
		2.4	Describe the sources of advice and information which can be used to understand the events internal and external to own business which impact upon business resilience
3	Understand the benefits and impact of developing business resilience	3.1	Describe the ways in which being resilient benefits the day-to-day performance of a business
		3.2	Explain the ways in which being resilient impacts on the development of a business
		3.3	Evaluate ways of monitoring the benefits and impact of being resilient for own business

**Y/504/6923      Develop a Business Resilience Plan**

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**Unit Status**                      Optional**Unit Level**                        3**Credit Value**                    2**Unit Learning hours**    8**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Review strengths and weaknesses in the resilience of a business
- ✓ Develop a business resilience plan
- ✓ Use a business resilience plan in supporting continuity of business service

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to review strengths and weaknesses in the resilience of a business	1.1	Identify frameworks which can be used to review the strengths and weaknesses in the resilience of a business
		1.2	Justify the use of a framework to review the strengths and weaknesses in the resilience of own business
		1.3	Review strengths in the resilience of own business
		1.4	Review weaknesses in the resilience of own business
		1.5	Identify the opportunities and threats for own business in planning and reviewing business resilience
2	Be able to develop a business resilience plan	2.1	Identify the key elements of a resilience plan for a business
		2.2	Plan how to collect information to assist in the development of a business resilience plan for own business
		2.3	Outline how to work with others internal and external to own business to develop a business resilience plan
3	Be able to use a business resilience plan in supporting continuity of business service	3.1	Identify the ways in which a business resilience plan will be used in own business
		3.2	Develop a strategy for engaging with others in the use of a business resilience plan in own business
		3.3	Identify ways of communicating the key elements of the business resilience plan for own business to staff and external stakeholders
		3.4	Identify indicators by which to review progress in own business against a business resilience plan

J/506/7959

Understand the Process of Exporting

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**Unit Status** Optional**Unit Level** 3**Credit Value** 2**Guided Learning** 12 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand why a business trades internationally
- ✓ Understand the approaches to exporting in a business
- ✓ Understand the process of exporting in a business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand why a business trades internationally	1.1	Define what is meant by trading internationally
		1.2	Describe the push and pull factors to trading internationally
		1.3	Explain the benefits of trading internationally
2	Understand the approaches to exporting in a business	2.1	Define what constitutes exporting
		2.2	Describe the similarities and differences in how businesses export products and services
		2.3	Explain the advantages and disadvantages of exporting in stages, through networks and in being 'born global'
3	Understand the process of exporting in a business	3.1	Describe the approaches to researching opportunities in new markets
		3.2	Assess the ways of establishing a presence in new markets
		3.3	Explain how to set up deals and fulfil orders in new markets
		3.4	Describe the different ways of getting paid when exporting
		3.5	Describe the types of processes and documentation required for new markets

F/506/7958 Assess the Potential to Export

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 2

**Guided Learning** 12 hours

**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Be able to assess the capability of a business to export
- ✓ Be able to undertake a SWOT analysis of the potential of a business to export
- ✓ Be able to review the usefulness of external sources of advice and guidance for exporting

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to assess the capability of a business to export	1.1	Assess the management time and people skills in own business to export
		1.2	Review the suitability of products and/or services offered by own business for exporting
		1.3	Review the financial capacity within own business to export
2	Be able to undertake a SWOT analysis of the potential of a business to export	2.1	Document the strengths and weaknesses of own business to export
		2.2	Document the opportunities and threats to own business in exporting
		2.3	Develop plan to prioritise the actions required in own business to export
3	Be able to review the usefulness of external sources of advice and guidance for exporting	3.1	Map networks and relationships of own business which would support exporting
		3.2	Identify the sources of advice and guidance external to own business to support exporting
		3.3	Identify the criteria for selecting sources of advice and guidance for own business to support exporting
		3.4	Develop strategies for using sources of advice and guidance to support own business in exporting

**A/506/7957      Develop a Plan for Exporting**

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    2

**Guided Learning**            12 hours

**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Be able to develop a plan for exporting in a business
- ✓ Be able to use a plan for trading internationally in a business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



**Unit Content**

<b>Learning Outcome - The learner will:</b>		<b>Assessment Criterion - The learner can:</b>	
1	Be able to develop a plan for exporting in a business	1.1	Identify the key elements of a plan for exporting for a business
		1.2	Plan how to collect the information to assist in the development of a plan for exporting for own business
		1.3	Outline how to work with others internal and external to own business to develop a plan for exporting
2	Be able to use a plan for trading internationally in a business	2.1	Identify the ways in which a plan for exporting will be used in own business
		2.2	Develop a strategy for engaging with others in the use of the plan for exporting in own business
		2.3	Identify ways of communicating the key elements of the plan for exporting to staff and external stakeholders of own business
		2.4	Identify indicators by which to review progress in own business against the plan for exporting

M/508/0706

Performance Management in a Business

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**Unit Status** Optional**Unit Level** 3**Credit Value** 6**Guided Learning** 30 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the importance of appraisal systems in driving forward the successes of a business
- ✓ Be able to explain the relationship between performance management and incentive schemes
- ✓ Be able to contribute to effective performance and incentive management in a business
- ✓ Be able to conduct and evaluate a performance review

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
Understand the importance of appraisal systems in driving forward the success of a business		1.1	Describe how monitoring staff performance and setting targets through an appropriate appraisal system can contribute to the success of a business
		1.2	Identify the key stages within an appraisal system
		1.3	Identify potential key performance indicators that would assist in the success of a business
		1.4	Explain how the key performance indicators identified can be translated into motivating targets for staff
Be able to explain the relationship between performance management and incentive schemes		2.1	Explain the purpose of incentive schemes within a business
		2.2	Identify the components of an incentive scheme
		2.3	Explain the factors that underpin an effective incentive scheme
Be able to contribute to effective performance and incentive management in a business		3.1	Identify and explain the factors that needs to be considered when managing performance
		3.2	Describe the information and support required by individuals involved in performance and incentive scheme processes
Be able to conduct and evaluate a performance review		4.1	Explain the frequency, purpose and process of performance reviews
		4.2	Conduct a performance review meeting
		4.3	Evaluate the outcomes of the performance review meeting, including own performance

L/615/4773

## Set Objectives and Provide Support for Team Members

<b>Unit Status</b>	Optional
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<b>Unit Level</b>	3
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<b>Credit Value</b>	5
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<b>Guided Learning</b>	35 hours
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**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Be able to communicate a team's purpose and objectives to team members
- ✓ Be able to develop a plan with team members showing how team objectives will be met
- ✓ Be able to support team members identifying opportunities and providing support

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to communicate a team's purpose and objectives to team members	1.1	Describe the purpose of a team
		1.2	Set team objectives with its members which are SMART
		1.3	Communicate the team's purpose and objectives to its members
2	Be able to develop a plan with team members showing how team objectives will be met	2.1	Discuss with team members how team objectives will be met
		2.2	Ensure team members participate in the planning process and think creatively
		2.3	Develop plans to meet team objectives
		2.4	Set SMART personal work objectives with team members
3	Be able to support team members to identify opportunities and provide support	3.1	Identify opportunities and difficulties faced by team members
		3.2	Discuss identified opportunities and difficulties with team members
		3.3	Provide advice and support to team members to overcome identified difficulties and challenges
		3.4	Provide advice and support to team members to make the most of identified opportunities

Y/615/4775

## Plan, Allocate and Monitor Work of a Team

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	5
<b>Guided Learning</b>	35 hours

**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Be able to plan work for a team
- ✓ Be able to allocate work across a team
- ✓ Be able to manage team members to achieve team objectives
- ✓ Be able to monitor and evaluate the performance of team members
- ✓ Be able to improve the performance of a team

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to plan work for a team	1.1	Agree team objectives with own manager
		1.2	Develop a plan for a team to meet agreed objectives, taking into account capacity and capabilities of the team
2	Be able to allocate work across a team	2.1	Discuss team plans with a team
		2.2	Agree work allocation and SMART objectives with team members
		2.3	Agree standard of work required by team
3	Be able to manage team members to achieve team objectives	3.1	Support all team members in order to achieve team objectives
4	Be able to monitor and evaluate the performance of team members	4.1	Assess team members' work against agreed standards and objectives
		4.2	Identify and monitor conflict within a team
		4.3	Identify causes for team members not meeting team objectives
5	Be able to improve the performance of a team	5.1	Identify ways of improving team performance
		5.2	Provide constructive feedback to team members to improve their performance
		5.3	Implement identified ways of improving team performance

Y/508/3020

Lead and Manage Meetings

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**Unit Status** Optional**Unit Level** 3**Credit Value** 4**Guided Learning** 20 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Be able to prepare to lead a meeting
- ✓ Be able to manage meeting procedures
- ✓ Be able to chair a meeting
- ✓ Be able to undertake post-meeting tasks

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to prepare to lead a meeting	1.1	Perform activities needed to be carried out in preparation for leading a meeting
		1.2	Produce documentation in support of activities
2	Be able to manage meeting procedures	2.1	Identify any formal procedures that apply in own organisation
3	Be able to chair a meeting	3.1	Manage the agenda in co-operation with participants to ensure meeting objectives are met
		3.2	Produce minutes of the meeting and allocate action points after discussions
4	Be able to undertake post-meeting tasks	4.1	Explain that the minutes of the meeting provide an accurate record of proceedings
		4.2	Communicate and follow up meeting outcomes to relevant individuals
		4.3	Evaluate whether the meeting's objectives were met and identify potential improvements

D/615/4776

Make Effective Decisions

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**Unit Status** Optional**Unit Level** 3**Credit Value** 3**Guided Learning** 20 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Be able to identify circumstances that require a decision to be made
- ✓ Be able to collect information to inform decision-making
- ✓ Be able to analyse information to inform decision-making
- ✓ Be able to make a decision

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to identify circumstances that require a decision to be made	1.1	Explain the circumstances requiring a decision to be made
		1.2	Identify the desired objective(s) for making a decision
		1.3	Establish criteria on which to base the decision, in line with own organisation
2	Be able to collect information to inform decision making	2.1	Identify information needed to inform the decision making process
		2.2	Communicate with stakeholders affected by the decision
		2.3	Explain how to inform stakeholders about the decision making process
3	Be able to analyse information to inform decision making	3.1	Identify information for validity and relevance to the decision making process
		3.2	Analyse information and against established criteria
4	Be able to make a decision	4.1	Apply decision making technique(s) to determine a decision
		4.2	Explain the decision made in line with desired objectives
		4.3	Communicate the decision taken to relevant stakeholders

H/615/4777

Managing Quality Within a Business

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**Unit Status** Optional**Unit Level** 3**Credit Value** 5**Guided Learning** 40 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the meaning of quality within a business context
- ✓ Understand the importance of business values and culture on the quality of performance
- ✓ Understand continual improvement and its application to business
- ✓ Understand the key components of quality management

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the meaning of quality within a business context	1.1	Using examples, explain what the term quality means within a business context
		1.2	Explain the potential value to business of investing in quality
2	Understand the importance of business values and culture on the quality of performance	2.1	Describe how business culture and values may impact on the quality of performance
		2.2	Explain how human behaviour may positively or negatively influence the quality of performance
3	Understand continual improvement and its application to business	3.1	Explain the principle of continual improvement
		3.2	Describe the benefits of continual improvement for a business
4	Understand the key components of quality management	4.1	Describe the key components of quality management: a) quality control b) quality assurance c) quality improvement
		4.2	Evaluate the contribution of each component to quality management within business
		4.3	Explain how quality management can benefit: a) a business b) its customers c) its suppliers d) other stakeholders
		4.4	Explain the benefits of a preventative approach to managing quality and outline the key stages in quality planning
		4.5	List monitoring and measuring techniques that a business might use and identify where and how they might be applied

K/615/4778

Manage Business Risk

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**Unit Status** Optional**Unit Level** 3**Credit Value** 4**Guided Learning** 21 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the management of business risk
- ✓ Be able to address business risk
- ✓ Be able to mitigate business risk

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - 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	Be able to address business risk	2.1	Monitor work in line with organisational risk procedures
		2.2	Identify potential risks using agreed risk criteria
		2.3	Assess identified risks, their potential consequences and the probability of them happening
		2.4	Communicate to stakeholders the likelihood of the risk occurring and its potential consequences
		2.5	Explain organisational business risk management policies
3	Be able to mitigate business risk	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

H/615/4780

## Manage the Impact of Work Activities on the Environment

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 30 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand how to support environmentally friendly working practices
- ✓ Be able to organise work so as to minimise the impact on the environment
- ✓ Be able to manage the environmental impact of the use of resources

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - 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	Be able to organise work so as to minimise the impact on the environment	2.1	Analyse potentially adverse effects on the environment caused by work activities
		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 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

T/615/4783

Lean Organisation Techniques in Business

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**Unit Status** Optional**Unit Level** 3**Credit Value** 5**Guided Learning** 34 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the concept of a lean environment
- ✓ Be able to implement the productivity needs analysis process
- ✓ Be able to produce a process map

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the concept of a lean environment	1.1	Describe the principles of lean organisation techniques including the benefits it can bring
		1.2	Analyse the benefits of lean organisation techniques
		1.3	Analyse the benefits of a lean environment
2	Be able to implement the productivity needs analysis process	2.1	Explain what is meant by a productivity needs analysis
		2.2	Analyse the benefits of the productivity needs analysis
		2.3	Describe the process for conducting a productivity needs analysis
		2.4	Undertake a productivity needs analysis in a selected organisation
		2.5	Identify improvements and draw up an action plan for their implementation
3	Be able to produce a process map	3.1	Produce a process map using appropriate symbols and terminology for an identified process

K/615/4764

Communicate in a Business Environment

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**Unit Status** Optional**Unit Level** 3**Credit Value** 3**Guided Learning** 24 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the purpose of planning communication
- ✓ Understand how to communicate in writing
- ✓ Understand how to communicate verbally
- ✓ Understand the purpose and value of feedback in developing communication skills

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the purpose of planning communication	1.1	Explain the benefits of knowing the purpose of communication
		1.2	Explain the reasons for knowing the audience to whom communications are presented
		1.3	Explain the purpose of knowing the intended outcomes of communication
		1.4	Describe different methods of communication and when to use them
2	Understand how to communicate in writing	2.1	Identify relevant sources of information that may be used when preparing written communication
		2.2	Explain the communication principles for using electronic forms of written communication in a business environment
		2.3	Explain different styles and tones of language and situations when they may be used for written communications
		2.4	Explain the reasons for selecting and using language that suits the purpose of written communication
		2.5	Describe ways of organising, structuring and presenting written information so it meets the needs of different audiences
		2.6	Describe ways of checking written information for accuracy of content
		2.7	Explain the purpose of accurate use of grammar, punctuation and spelling in written communication
		2.8	Explain what is meant by plain English and why it is used
		2.9	Explain the purpose of proofreading and checking work
		2.10	Explain the purpose of recognising work that is 'urgent'

		2.11	Describe organisational procedures for saving and filing written communications
3	Understand how to communicate verbally	3.1	Describe ways of verbally presenting information and ideas clearly
		3.2	Explain ways of making contributions to discussions that help to achieve objectives
		3.3	Describe ways of adapting verbal contributions to suit different audiences, purposes and situations
		3.4	Describe how to use and interpret body language
		3.5	Describe how to use and interpret tone of voice
		3.6	Describe methods of active listening
		3.7	Describe the benefits of active listening
		3.8	Explain the purpose of summarising verbal communication
4	Understand the purpose and value of feedback in developing communication skills	4.1	Describe ways of getting feedback on whether communications achieved their purpose
		4.2	Explain the purpose and benefits of using feedback to further develop communication skills

R/507/6910 Planning for Growth

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 2

**Unit Learning hours** 20

**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- Understand the risks and opportunities of growth to a business
- Be able to construct a growth plan
- Be able to gain feedback to support analysing the quality of a growth plan

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the risks and opportunities of growth to a business	1.1	Analyse the opportunities that growth brings to a business
		1.2	Analyse the risks that growth brings to a business including methods that can be used to minimise the impact of the risks
		1.3	Identify the sources of information a business could use in order to make informed decisions as to whether actions to support growth is necessary or worth taking
		1.4	Describe the relationship between a growth goal and a growth plan
2	Be able to construct a growth plan	2.1	Produce a growth plan for both personal and business related growth identifying relevant 1, 6 and 12 month growth milestones
3	Be able to gain feedback to support analysing the quality of a growth plan	3.1	Make a persuasive and accurate case for the growth plan that enlists the support of the audience
		3.2	Solicit feedback from the audience to support the further development of the growth plan
		3.3	Identify improvements to the growth plan based on the feedback gathered
		3.4	Implement the improvements identified



## D/507/6912     Developing Growth Using the Business Chassis Concept

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    3

**Unit Learning hours**    30

### **Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- Understand the importance of the business chassis in planning for business growth
- Be able to develop a business chassis

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the importance of the business chassis in planning for business growth	1.1	Explain what is meant by the business chassis
		1.2	Explain how the business chassis can contribute to the growth of a business
		1.3	For a given business, apply the concept of the business chassis to analyse the current performance of the business against the '5 ways' formula
		1.4	Explain methods the business could use in order to address any identified shortfalls in its current performance
2	Be able to develop a business chassis	2.1	Produce a business chassis for own business identifying current performance against the '5 ways' formula
		2.2	Identify methods to increase the performance of own business based on the business chassis

## H/507/6913      Developing Growth Through Market Research

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    3

**Unit Learning hours**    30

### **Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- Understand how business makes use of questionnaires to support growth strategies
- Be able to develop a growth focused customer research questionnaire
- Be able to carry out customer research through a growth focused questionnaire
- Be able to analyse and make use of research data

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how business makes use of questionnaires to support growth strategies	1.1	Explain the importance customer focused research plays in the development of a growth plan for a business
		1.2	Identify the methods used by three given businesses for how customer focused research is carried out
		1.3	Describe how legislation can impact on the collection, use and storage of data collected during customer focused research
		1.4	Explain the impact on a business resulting from not following relevant legislation in relation to the collection, use and storage of data collected during market research
2	Be able to develop a growth focused customer research questionnaire	2.1	Identify a series of both open and closed questions that could be used within a customer focused questionnaire to support the gathering of appropriate information to aid the development of a business growth plan
		2.2	Produce a customer focused questionnaire based on the identified questions
3	Be able to carry out customer research through a growth focused questionnaire	3.1	Carry out the questionnaire with a minimum of 10 potential and/or actual customers
		3.2	Record the data appropriately and in a way that aids analysis following legal requirements relating to the collection, use and storage of the data
4	Be able to analyse and make use of research data	4.1	Identify key themes and trends that appear within the collected data that could impact on business growth plans
		4.2	Take account of the key themes and trends identified within the development and review of business growth plans

## K/507/6914      Developing Growth Through Pricing Strategies

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**Unit Status**                      Optional

**Unit Level**                      3

**Credit Value**                      1

**Unit Learning hours**    10

### **Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- Understand the methods used to develop a pricing strategy
- Be able to develop a pricing strategy to support business growth

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the methods used to develop a pricing strategy	1.1	Explain the importance of a pricing strategy on the operation and growth of a business
		1.2	Analyse the methods used by three given businesses for how a pricing strategy was formulated
		1.3	Analyse the advantages and disadvantages of the methods used by the three given businesses
2	Be able to develop a pricing strategy to support business growth	2.1	Identify the current pricing strategy of own business
		2.2	Select an appropriate method in order to develop a pricing strategy that will support growth within own business
		2.3	Produce a pricing strategy that will support growth for own business using the selected method
		2.4	Analyse the impact the developed pricing strategy would have in relation to growth strategies within own business

## M/507/6915    Developing Growth Through Marketing Plans

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**Unit Status**                      Optional

**Unit Level**                      3

**Credit Value**                      3

**Unit Learning hours**    30

### **Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- Understand the marketing techniques a business can use to promote a product or service
- Understand the importance of a marketing plan to a business
- Be able to produce a marketing plan
- Be able to gain feedback to support analysing the quality of a marketing plan

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the marketing techniques a business can use to promote a product or service	1.1	Explain the different techniques available to a business in order to market a product or service
		1.2	Analyse the advantages and disadvantages of the different techniques available
2	Understand the importance of a marketing plan to a business	2.1	Explain the importance of a marketing plan on the operation and growth of a business
		2.2	Identify the key elements that should be included within a marketing plan
		2.3	Explain why it is important to include goals for marketing and sales within a marketing plan
		2.4	Analyse the methods used by three given businesses for marketing a product or service within the following situations a) where the business has a cash flow shortfall b) where the business has a steady cash flow c) where the business is experiencing a time of growth and has surplus cash available
		2.5	Analyse the advantages and disadvantages of the methods used by the three given businesses
3	Be able to produce a marketing plan	3.1	Produce a marketing plan that will support growth for own business
4	Be able to gain feedback to support analysing the quality of a marketing plan	4.1	Make a persuasive and accurate case for the marketing plan that enlists the support of the audience
		4.2	Solicit feedback from the audience to support the further development of the marketing plan
		4.3	Identify improvements to the marketing plan based on the feedback gathered
		4.4	Implement the improvements identified



**T/507/6916      Developing Growth Through Social Media Strategies**

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**Unit Status**              Optional**Unit Level**                3**Credit Value**            2**Unit Learning hours**   20**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- Understand the social media channels that can be used by organisations to support innovation and growth
- Understand the legalities and etiquette that can be used by organisations to support innovation and growth
- Understand how to produce business blogs that encourage readership

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the social media channels that can be used by organisations to support innovation and growth	1.1	Identify the social media channels available for use by an organisation
		1.2	Describe the benefits and shortfalls of the channels identified
		1.3	Explain how an organisation would select the most appropriate channel to use for a group of customers or particular market
		1.4	Explain the different types of content that an organisation could use within social media channels
		1.5	Explain how an organisation would select the most appropriate content type for different social media channels
2	Understand the legalities and etiquette that can be used by organisations to support innovation and growth	2.1	Describe the risks of using social media to the brand and public perception of a business
		2.2	Identify an example of how social media has been used ineffectively and so damaged the brand and/or reputation of an organisation
		2.3	Explain how the organisation could have dealt with the situation in a more effective and positive manner
		2.4	Explain why it is important for an organisation to have a social media policy and guidelines
		2.5	Explain the importance of an organisation having a reputation management policy
3	Understand how to produce business blogs that encourage readership	3.1	Describe methods own business can use in order to select an appropriate topic for a business blog
		3.2	Explain the structures that can be used in which to set out a blog posting
		3.3	Explain how to select a title that encourages increased readership levels

## A/507/6917      Developing Growth Through Financial Planning

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    2

**Unit Learning hours**    20

### **Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- Be able to evaluate financial options to fund growth in a business
- Understand the management of cash flow within a business and its effect on growth strategies
- Be able to manage cash flow within a business to support growth

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to evaluate financial options to fund growth in a business	1.1	Identify the costs that are associated with growth strategies within a business
		1.2	Analyse the advantages and disadvantages of different methods of funding the costs identified to support growth within a business
2	Understand the management of cash flow within a business and its effect on growth strategies	2.1	Identify different ways of sourcing cash to manage potential shortfalls in income and expenditure in a business
		2.2	Analyse how the timing of cash receipts and spending affects cash flow in a business
		2.3	Describe methods that can be used in order to manage cash shortfalls within a business
		2.4	Explain how cash flow can effect business growth strategies within a business
3	Be able to manage cash flow within a business to support growth	3.1	Identify the costs experienced by own business within a given growth strategy at a 1, 6 and 12 month period
		3.2	Explain methods that own business could use in order to fund the identified costs
		3.3	Identify potential cash shortfalls within the given situation and explain the methods that could be used in order to overcome them

## F/507/6918      Developing Growth Through Tendering Opportunities

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**Unit Status**              Optional

**Unit Level**              3

**Credit Value**              3

**Unit Learning hours**    30

### **Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- Understand where potential tendering opportunities can be found
- Understand the importance of tender readiness checks to an organisation
- Understand how partner organisations can support tendering opportunities
- Understand how to develop a business proposal for a tendering opportunity

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand where potential tendering opportunities can be found	1.1	Identify the sources of potential tender opportunities within a sector of interest
		1.2	Identify trends in tendering opportunities within this sector
		1.3	Explain the processes used by issuing authorities for tendering opportunities
		1.4	Explain methods that can be used in order to analyse the viability of a tendering opportunity
2	Understand the importance of tender readiness checks to an organisation	2.1	Explain how completing tender readiness checks can benefit an organisation
		2.2	Identify the main points that should be included in any tender readiness check
		2.3	Review a given business against a tender readiness check and identify any actions that the business would be required to address
3	Understand how partner organisations can support tendering opportunities	3.1	Explain why it might be appropriate to negotiate with potential partners in order to tender as a consortia
		3.2	Explain why it is important to identify the added value partner organisations can bring to a tender opportunity
		3.3	Explain why it is important to ensure the capability of partner organisations
		3.4	Explain the benefit of service level agreements in any partnership working arrangements
		3.5	Identify the main points that should be included in any service level agreement
4	Understand how to develop a business proposal for a tendering opportunity	4.1	Explain how to develop a business proposal for the provision of services
		4.2	Identify the key business documents that form the basis of any tendering opportunity and so should be kept up to date
		4.3	For a given example, draft a business proposal that could be submitted for a tendering opportunity

## L/507/1852 Planning to Take Advantage of a VCSE Opportunity

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 14

**Unit Learning hours** 21

### **Unit Overview and Main Outcomes**

This unit contains 7 learning outcomes which will support the learner to be able to:

- Understand the role and value of social enterprise
- Be able to develop an idea for the development of a social enterprise
- Be able to identify the market strength for a social enterprise opportunity
- Be able to calculate cash requirements for a social enterprise opportunity
- Be able to identify appropriate legal structures and governance for a social enterprise opportunity
- Be able to judge the attractiveness of a social enterprise opportunity to investors
- Be able to plan for the next steps in taking advantage of a social enterprise opportunity

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the role and value of social enterprise	1.1	Describe the key characteristics of a social enterprise
		1.2	Explain what is meant by social purpose
		1.3	Explain the economic and social drivers to starting and managing a social enterprise
		1.4	Explain how social objectives link to commercial objectives in a social enterprise
2	Be able to develop an idea for the development of a social enterprise	2.1	Identify an opportunity to support the development of a social enterprise
		2.2	Identify the barriers and challenges to the development of the opportunity to develop a social enterprise
		2.3	Evaluate the opportunity against own triple bottom line goals for social, environmental and financial factors
3	Be able to identify the market strength for a social enterprise opportunity	3.1	Identify the potential market for the social enterprise opportunity identified
		3.2	Conduct market research to test the demand and viability of the social enterprise opportunity
		3.3	Evaluate the strength of the market demonstrated by the market research in terms of development and sustainability of the social enterprise opportunity
4	Be able to calculate cash requirements for a social enterprise opportunity	4.1	Calculate the income and expenditure needed for the development and launch of the social enterprise opportunity
		4.2	Identify the potential cash shortfalls and actions required to address any shortfalls
		4.3	Identify the different forms of financing available to launch a social enterprise opportunity
		4.4	Explain the advantages and disadvantages of each of the finance options available
		4.5	Identify the most appropriate finance options for own social enterprise opportunity
5	Be able to identify appropriate legal structures and governance for a social enterprise opportunity	5.1	Identify the different forms of legal structures and governance a social enterprise can use
		5.2	Explain the advantages and disadvantages of each of the legal structures and governance identified
		5.3	Identify the most appropriate legal structure and governance for own social enterprise opportunity



6	Be able to judge the attractiveness of a social enterprise opportunity to investors	6.1	Identify potential investors for the social enterprise opportunity
		6.2	Identify the needs of the different investors to make a social enterprise opportunity attractive to them
		6.3	Evaluate own social enterprise opportunity against the needs identified and reach a decision on whether the opportunity will be an attractive proposition
		6.4	Identify changes and alterations that may be required to the social enterprise opportunity in order to address any shortfalls in its attractiveness to investors
7	Be able to plan for the next steps in taking advantage of a social enterprise opportunity	7.1	Identify the key milestones in the development of the social enterprise opportunity
		7.2	Produce an action plan for what is required for the implementation of the social enterprise opportunity including: a) action required b) responsible person/people c) deadline for activity d) method of reviewing activity success

## R/507/1853 Introduction to Business Planning for VCSE Organisations

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 14

**Unit Learning hours** 21

### **Unit Overview and Main Outcomes**

This unit contains 7 learning outcomes which will support the learner to be able to:

- Understand how to evaluate the effect of the business environment
- Understand how to identify and take advantage of potential social enterprise opportunities
- Understand how to research and prove a market demand for a social enterprise opportunity
- Understand finance within a business context
- Understand the importance of accurate bookkeeping to finances within a social enterprise
- Understand where to access business support services
- Understand how to measure the impact made by a social enterprise

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to evaluate the effect of the business environment	1.1	Explain what is meant by the business environment
		1.2	Explain how a PESTLE analysis can support a social enterprise in understanding their business environment
		1.3	Explain where a social enterprise could access information in order to help it complete a PESTLE analysis
		1.4	Describe the current trends within the economy that could affect a social enterprise in terms of the following influences: a) political b) economic c) sociological d) technological e) legal f) environmental
2	Understand how to identify and take advantage of potential social enterprise opportunities	2.1	Explain how to identify new business opportunities
		2.2	Identify a potential social enterprise opportunity that has the potential to be implemented
		2.3	Describe how to take advantage of the potential new social enterprise opportunity identified
		2.4	Identify the potential risks associated with the new social enterprise opportunity identified
		2.5	Identify key milestone for the development of the social enterprise opportunity over a 1 year period
3	Understand how to research and prove a market demand for a social enterprise opportunity	3.1	Describe the types of market research that a social enterprise can use to identify: a) potential markets b) customer needs c) market competition
		3.2	Identify the resources required to conduct detailed market research
		3.3	Describe how to check whether a social enterprise is reaching its intended market
		3.4	Describe how to set marketing targets for a social enterprise
		3.5	Identify the information required to judge the marketing performance of a social enterprise
		3.6	Produce a marketing plan for a social enterprise ensuring to include the customer

			groups being targeted and the estimated costings involved in the activities contained within the plan
4	Understand finance within a business context	4.1	Define income, expenditure, turnover and cash flow in a business context
		4.2	Explain the difference between 'gross' and 'net' profit
		4.3	Describe the financial records that should be kept by a social enterprise
		4.4	Explain why it is important to keep financial records
		4.5	Describe the factors that affect cash flow in a social enterprise
		4.6	Explain how to manage temporary cash shortfalls to avoid longer term effects on a social enterprise
5	Understand the importance of accurate bookkeeping to finances within a social enterprise	5.1	Describe how the process of bookkeeping supports financial management in a social enterprise
		5.2	Describe how the chart of accounts for a social enterprise supports the preparation of a) financial accounts b) management accounts
		5.3	Describe own current needs for bookkeeping
		5.4	Prepare an action plan for the next steps in developing an appropriate bookkeeping system
6	Understand where to access business support services	6.1	Identify the informal sources of help and support available for a social enterprise
		6.2	Identify the formal sources of help and support available for a social enterprise
		6.3	Explain how to find out where help and support for a social enterprise can be obtained
7	Understand how to measure the impact made by a social enterprise	7.1	Describe the social, environmental and economic aims of the social enterprise
		7.2	Identify appropriate indicators that could be used to measure the impact of the social enterprise in relation to the aims described
		7.3	Design a strategy for collecting and measuring data for each of the indicators identified

**Unit Status**                      Optional

**Unit Level**                      3

**Credit Value**                      15

**Unit Learning hours**    24

### **Unit Overview and Main Outcomes**

This unit contains 5 learning outcomes which will support the learner to be able to:

- Understand the processes involved in the selection and recruitment of staff
- Understand the legislation applicable to the management of employees in an organisation
- Understand the importance of appraisal systems in driving forward the success of an organisation
- Understand disciplinary and redundancy procedures
- Understand the part that TUPE plays in the HR process

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the processes involved in the selection and recruitment of staff	1.1	Identify the importance of a structured recruitment and selection process
		1.2	Describe the stages of the recruitment and selection process
		1.3	Explain the advantages and disadvantages of different methods of recruitment
		1.4	Explain the importance of accurate job descriptions
		1.5	Explain the importance of ensuring an organisations recruitment and selection process is compliant with current legislation
		1.6	Explain the importance of an induction programme for an organisation
2	Understand the legislation applicable to the management of employees in an organisation	2.1	Explain how health and safety legislation relates to own organisation
		2.2	Explain how employment legislation relates to own organisation
		2.3	Identify employee rights and entitlements under current legislation
		2.4	Explain the principles and exceptions within legislation relating to:  a) age discrimination b) disability discrimination c) employment equality (religion and belief regulations) d) fixed term employee e) gender reassignment f) marriage/civil partnership g) part time workers h) pregnancy and maternity i) racial discrimination j) sex discrimination k) sexual orientation
		2.5	Explain how to identify areas of non-compliance in an organisation's employment, environment and safety policies
		2.6	Explain the importance of complying with legislation relating to employment

3	Understand the importance of appraisal systems in driving forward the success of an organisation	3.1	Describe how monitoring staff performance and setting targets through an appropriate appraisal system can contribute to the success of an organisation
		3.2	Identify the key stages within an appraisal system
		3.3	Identify potential key performance indicators that would assist in the success of an organisation
		3.4	Explain how the key performance indicators identified could be translated into motivating targets for staff
4	Understand disciplinary and redundancy procedures	4.1	Describe people's rights in the workplace and their entitlement to grievance processes
		4.2	Explain what steps should be included in a grievance process
		4.3	Explain what steps should be included in a disciplinary process
		4.4	Describe alternative methods of managing poor performance other than dismissal
		4.5	Explain the types of follow up actions required at each stage of a disciplinary process by managers and employees
		4.6	Identify ways in which an employment contract can be legally terminated
		4.7	Describe the basis on which staff may be made redundant
		4.8	Explain what steps should be followed for staff redundancies
5	Understand the part that TUPE plays in the HR process	5.1	Identify the situations where TUPE applies to employees
		5.2	Explain the effect of TUPE on: a) the protections provided to employees b) the requirements placed on the organisation the employee is leaving c) the requirements placed on the organisation the employee is joining

**D/507/1855      Locating and Responding to Tender Opportunities**

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**Unit Status**              Optional**Unit Level**                3**Credit Value**            13**Unit Learning hours**   15**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- Understand where potential tendering opportunities can be found
- Understand the importance of tender readiness checks to an organisation
- Understand how partner organisation can support tendering opportunities
- Understand how to develop a business proposal for a tendering opportunity

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- Product evidence
- Learner statement/case study
- Pre-approved worksheets
- Professional discussion
- Recognition of prior achievement
- Recognition of prior learning
- Witness testimony



## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand where potential tendering opportunities can be found	1.1	Identify the sources of potential tender opportunities within the sector of interest to own organisation
		1.2	Identify the trends in tendering opportunities released within the sector of interest to own organisation
		1.3	Explain the processes used by a chosen issuing authority for tendering opportunities
		1.4	Explain methods that can be used in order to analyse the viability of a tendering opportunity
2	Understand the importance of tender readiness checks to an organisation	2.1	Explain how completing tender readiness checks can benefit an organisation
		2.2	Identify the main points that should be included in any tender readiness check
		2.3	Review own organisation against the tender readiness check and identify any actions required to address any highlighted shortfalls
		2.4	Produce an action plan for what is required in order to ensure the organisation is tender ready including: a) action required b) responsible person/people c) deadline for activity d) method of reviewing activity success
3	Understand how partner organisation can support tendering opportunities	3.1	Identify when it might be appropriate to negotiate with potential partners in order to tender as a consortia
		3.2	Explain why it is important to identify the added value partner organisations can bring to a tender opportunity
		3.3	Explain why it is important to ensure the capability of partner organisations
		3.4	Explain the benefit of service level agreements in any partnership working arrangements
		3.5	Identify the main points that should be included in any service level agreement

4	Understand how to develop a business proposal for a tendering opportunity	4.1	Explain how to develop a business proposal for the provision of services
		4.2	Identify the key business documents that form the basis of any tendering opportunity and so should be kept up to date
		4.3	For a given example, draft a business proposal that could be submitted for a tendering opportunity ensuring to include all aspects of own organisations potential offering

## New Market Development

The following units aim to support the development of those skills required to scope out potential new markets and business opportunities that a business can take advantage of in order to promote both its survival and growth.

**Y/507/0798      Assess and Plan New Markets for a Business**

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**Unit Status**                      Optional

**Unit Level**                        3

**Credit Value**                    2

**Guided Learning**            12 hours

**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the approaches to developing new markets
- ✓ Be able to assess the potential to developing new markets within a business
- ✓ Be able to develop a plan for developing new markets in a business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the approaches to developing new markets	1.1	Define what is meant by developing new markets
		1.2	Describe the push and pull factors to developing new markets
		1.3	Explain the benefits of developing new markets in developing a business
		1.4	Describe the activities undertaken in developing new markets
		1.5	Assess the challenges and opportunities in developing new markets
2	Be able to assess the potential to developing new markets within a business	2.1	Review strengths and weaknesses in own business to develop new markets
		2.2	Review the opportunities and threats to own business in developing new markets
		2.3	Evaluate the implications for finances, management and operations in own business in developing new markets
		2.4	Evaluate the suitability of products/services of own business in developing new markets
3	Be able to develop a plan for developing new markets in a business	3.1	Evaluate markets with opportunities for the products/services of own business
		3.2	Plan how to research the need for products/services of own business in target market(s)
		3.3	Review ways of establishing a presence in target market(s)
		3.4	Develop a list of actions required in own business to develop target market(s)
		3.5	Prioritise actions required in own business to develop new markets with responsibilities and timings

## A/615/4784 Locating and Responding to Tender Opportunities

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 5

**Guided Learning** 15 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand where potential tendering opportunities can be found
- ✓ Understand the importance of tender readiness checks to an organisation
- ✓ Understand how partner organisations can support tendering opportunities
- ✓ Understand how to develop a business proposal for a tendering opportunity

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand where potential tendering opportunities can be found	1.1	Identify sources of potential tender opportunities within the sector of interest
		1.2	Identify the trends in tendering opportunities released within the sector of interest
		1.3	Explain the processes used by a chosen issuing authority for tendering opportunities
		1.4	Explain methods that can be used in order to analyse the viability of a tendering opportunity
2	Understand the importance of tender readiness checks to an organisation	2.1	Identify the main points that should be included in any tender readiness check
		2.2	Review own organisation against the tender readiness check and identify any actions required to address any highlighted shortfalls
		2.3	Produce an action plan for what is required to ensure the organisation is tender ready including: a) action required b) responsible person/people c) deadline for activity d) method of reviewing activity success
3	Understand how partner organisations can support tendering opportunities	3.1	Identify when it might be appropriate to negotiate with potential partners to tender as a consortia
		3.2	Explain why it is important to identify the added value partner organisations can bring to a tender opportunity
		3.3	Explain why it is important to ensure the capability of partner organisations
		3.4	Explain the benefit of service level agreements in any partnership working arrangements
		3.5	Identify the main points that should be included in any service level agreement
4	Understand how to develop a business proposal for a tendering opportunity	4.1	Explain how to develop a business proposal for the provision of services
		4.2	Identify the key business documents that form the basis of any tendering opportunity and so should be kept up to date
		4.3	Draft a business proposal that could be submitted for a tendering opportunity ensuring to include all aspects of own organisations potential offering

J/615/4786

Manage a Tendering Process

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**Unit Status** Optional**Unit Level** 3**Credit Value** 4**Guided Learning** 21 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Be able to develop a tender specification
- ✓ Be able to manage a tendering exercise
- ✓ Be able to negotiate the award of contracts

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to develop a tender specification	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	Be able to manage a tendering exercise	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

# SFEDI<sup>®</sup>AWARDS

## Business Improvement

The following units aim to support the development of those skills required to continuously review the state and operations of a business in order to plan and implement improvements that will increase the effectiveness of its operations.

R/615/4788

Business Improvement Tools and Techniques

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**Unit Status** Optional**Unit Level** 3**Credit Value** 5**Guided Learning** 35 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand continuous improvement techniques
- ✓ Understand the principles and techniques of workplace organisation
- ✓ Be able to use visual indicators to improve the work environment
- ✓ Understand ways to eliminate variance from processes in the workplace

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

**Unit Content**

<b>Learning Outcome - The learner will:</b>		<b>Assessment Criterion - The learner can:</b>	
1	Understand about continuous improvement techniques	1.1	Analyse the main Kaizen techniques and workplace organisation techniques in an organisation of own choice
2	Understand the principles and techniques of workplace organisation	2.1	Analyse areas of weakness in workplace organisation and suggest improvements
3	Be able to use visual indicators to improve the work environment	3.1	Identify elements that contribute to good visual management in the workplace
		3.2	Suggest potential improvement to visual management in the workplace
4	Understand ways to eliminate variance from processes in the workplace	4.1	Analyse the benefits of standard working methods and prepare a standardised work document suggesting how to eliminate variance to process

L/615/4790

## Complying with Statutory Regulations and Organisational Safety Requirements

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 5

**Guided Learning** 35 hours

### Unit Overview and Main Outcomes

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Understand how to comply with statutory regulations and organisational safety requirements
- ✓ Understand how to comply with statutory regulations and organisational safety requirements

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to comply with statutory regulations and organisational safety requirements	1.1	Comply with duties and obligations as defined in relevant health and safety legislation
		1.2	Demonstrate own understanding of duties and obligations to health and safety by: <ul style="list-style-type: none"> <li>• Applying in principle own duties and responsibilities as an individual under relevant health and safety legislation</li> <li>• Identifying, within own organisation, appropriate sources of information and guidance on health and safety issues such as PPE, COSHH, risk assessments</li> <li>• Identifying the warning signs and labels of the main groups of hazardous or dangerous substances</li> <li>• Complying with the appropriate statutory regulations at all times</li> </ul>
		1.3	Present self in the workplace suitably prepared for the activities to be undertaken
		1.4	Follow organisational accident and emergency procedures
		1.5	Comply with emergency requirements, to include: <ul style="list-style-type: none"> <li>• Identifying the appropriate qualified first aiders and the location of first aid facilities</li> <li>• Identifying the procedures to be followed in the event of injury to self or others</li> <li>• Following organisational procedures in the event of fire and the evacuation of premises</li> <li>• Identifying the procedures to be followed in the event of dangerous occurrence or hazardous malfunctions of equipment</li> </ul>
		1.6	Recognise and control hazards in the workplace
		1.7	Identify the hazards and risks that are associated with the following: <ul style="list-style-type: none"> <li>• Their working environment</li> <li>• The equipment that they use</li> <li>• Materials and substances, where appropriate, that are used</li> <li>• Working practices that do not follow laid down procedures</li> </ul>

		1.8	Use correct manual lifting and carrying techniques
		1.9	Demonstrate one of the following methods of manual lifting and carrying: <ul style="list-style-type: none"> <li>Lifting alone</li> <li>With assistance of others</li> <li>With mechanical assistance</li> </ul>
		1.10	Apply safe working practices and procedures to include: <ul style="list-style-type: none"> <li>Maintaining a tidy workplace, with exits and gangways free from obstruction</li> <li>Using equipment safely and only for the purpose intended</li> <li>Observing organisational safety rules, signs and hazard warning</li> <li>Taking measures to protect others from any harm resulting from the work that they are carrying out</li> </ul>
2	Understand how to comply with statutory regulations and organisational safety requirements	2.1	Describe the roles and responsibilities of self and others under relevant health and safety legislation
		2.2	Describe the specific regulations and safe working practices and procedures that apply to own work activities
		2.3	Describe the warning signs for the seven main groups of hazardous substances defined by classification, packaging and labelling of dangerous substances regulations
		2.4	Explain how to locate relevant health and safety information for own tasks, and the sources of expert assistance when help is needed
		2.5	Explain what constitutes a hazard in the workplace
		2.6	Describe own responsibilities for identifying and dealing with hazards and reducing risks in the workplace
		2.7	Describe the risks associated with own working environment
		2.8	Describe the processes and procedures that are used to identify and rate the level of risk
		2.9	Describe the first aid facilities that exist within own work area and within the organisation in general and the procedures to be followed in the case of accidents involving injury



	2.10	Explain what constitutes dangerous occurrences and hazardous malfunctions and why these must be reported even if no one is injured
	2.11	Describe the procedures for sounding the emergency alarms, evacuation procedures and escape routes to be used, and the need to report own presence at the appropriate assembly point
	2.12	Describe the organisational policy with regard to firefighting procedures; the common causes of fire and what they can do to help prevent them
	2.13	Describe the protective clothing and equipment that is available for own areas of activity
	2.14	Explain how to safely lift and carry loads, and the manual and mechanical aids available
	2.15	Explain how to prepare and maintain safe working areas; the standards and procedures to ensure good housekeeping
	2.16	Describe the importance of safe storage of tools, equipment, materials and products
	2.17	Describe the extent of own authority, and to whom they should report in the event of problems that cannot be resolved by own actions

Y/615/4792

Leading Effective Teams

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**Unit Status** Optional**Unit Level** 3**Credit Value** 4**Guided Learning** 26 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Lead effective teams
- ✓ Understand how to lead effective teams

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Lead effective teams	1.1	Work safely at all times, complying with health and safety and other relevant regulations and guidelines
		1.2	Work in accordance with the roles and responsibilities identified for the team lead role
		1.3	Obtain the authority and support for the release of the necessary resources to carry out the team activities
		1.4	Consult with appropriate people in order to secure the release of the following resources: <ul style="list-style-type: none"> <li>• People involved</li> <li>• Work space/work area required</li> <li>• Documentation and information required</li> </ul>
		1.5	Set realistic and achievable goals and objectives for own team, in accordance with the targets set for themselves or for the work area/activity
		1.6	Prioritise the work activities to achieve the objectives, cost effectively and efficiently
		1.7	Develop action plans which clearly identify activities and responsibilities required to meet the team targets: <ul style="list-style-type: none"> <li>• For self</li> <li>• For the team</li> </ul>
		1.8	Determine and agree individual roles and responsibilities, and coach/mentor own team, focusing on the objectives that have been set
		1.9	Monitor the performance of own team against the goals and objectives which have been set, and communicate this to the relevant people
		1.10	Communicate effectively with: <ul style="list-style-type: none"> <li>• Management</li> <li>• Peers</li> <li>• Subordinates</li> </ul>
		1.11	Communication must include: <ul style="list-style-type: none"> <li>• Verbal</li> <li>• Written</li> <li>• Electronic methods</li> </ul>

		1.12	Deal promptly and effectively with any problems within own control, and report those that cannot be resolved
2	Understand how to lead effective teams	2.1	Describe the roles and responsibilities of self and others under relevant health and safety legislation
		2.2	Describe the business targets set for own area of responsibility, and how to set personal, individual and team targets to achieve them (action planning)
		2.3	Explain how to prioritise own and team's workload to ensure that targets are met
		2.4	Explain how to communicate effectively, listen, question, support and coach others to work towards the business targets
		2.5	Explain how to present information effectively to management, peers or team members, using different methods
		2.6	Explain how to conduct a team performance review and how to involve the team in brainstorming activities to identify opportunities, threats and solutions
		2.7	Describe the types of conflict and problem that might emerge between work activities
		2.8	Describe the organisational processes and procedures required to run own area of responsibilities effectively
		2.9	Describe the improvement tools and techniques being used in own area of responsibility
		2.10	Describe the specialist help that may be required in own area of responsibility, and how this can be obtained
		2.11	Explain how to structure and lead a team event, and the presentation materials and work documentation required
		2.12	Explain how to train others in the processes and procedures relevant them and to own area of responsibility

		2.13	Explain how to monitor and check that the team is working to identified quality and safety standards
		2.14	Describe the extent of own authority and to whom to report to in the event that problems cannot be resolved

A/615/4798

Applying Workplace Organisation Techniques

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**Unit Status** Optional**Unit Level** 3**Credit Value** 6**Guided Learning** 51 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply workplace organisation techniques
- ✓ Understand how to apply workplace organisation techniques

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply workplace organisation techniques	1.1	Work safely at all times, complying with health and safety and other relevant regulations and guidelines
		1.2	Co-ordinate and apply the process of workplace organisation within the chosen work area, and establish the area score
		1.3	Identify and confirm where information, resources or equipment is missing or is in surplus, and what improvements can be made
		1.4	Produce changes to standard operation procedures and visual controls that everyone works to within the area
		1.5	Make changes to standard operating procedures which cover three of the following: <ul style="list-style-type: none"> <li>• Cleaning of equipment/work area</li> <li>• Maintenance of equipment</li> <li>• Health and safety</li> <li>• Process procedures</li> <li>• Manufacturing operations/working processes</li> <li>• Quality systems</li> <li>• Regulatory compliance system</li> </ul>
		1.6	Make changes to visual controls which cover three of the following: <ul style="list-style-type: none"> <li>• Producing shadow boards or an alternative to standardise the storage and location of area resources and/or equipment</li> <li>• Colour coding</li> <li>• Line status systems</li> <li>• Skills matrix</li> <li>• Performance measures</li> <li>• Process control boards</li> <li>• Improvement systems</li> <li>• Planning systems</li> </ul>
		1.7	Make improvements to the workplace organisation and establish the new improved area score
2	Understand how to apply workplace organisation techniques	2.1	Describe the health and safety requirements of the area in which they are carrying out the workplace organisation activity

	2.2	Describe the factors to be considered when selecting a work area for an activity
	2.3	Describe the procedure used to identify and address surplus or missing equipment or resources
	2.4	Explain how to arrange and label the necessary resources or equipment for rapid identification access
	2.5	Explain how to correlate information to create or update standard operating procedures or other approved documentation
	2.6	Explain how to evaluate and prioritise the improvements required for the workplace
	2.7	Explain how to score and audit the workplace organisation
	2.8	Describe the techniques required to communicate information using visual control systems
	2.9	Describe the extent of own authority and to whom to report in the event that problems cannot be resolved



F/615/4799

## Apply Continuous Improvement Techniques (Kaizen)

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 6

**Guided Learning** 55 hours

### Unit Overview and Main Outcomes

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply continuous improvement techniques (Kaizen)
- ✓ Understand how to apply continuous improvement techniques (Kaizen)

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply continuous improvement techniques (Kaizen)	1.1	Work safely at all time complying with health and safety and other relevant regulations and guidelines
		1.2	Plan the Kaizen process to the agreed work area/activity to include plan, do, check, act
		1.3	Establish objectives and targets for the Kaizen activity
		1.4	Carry out the Kaizen activity within the chose work area/activity
		1.5	Identify and confirm waste problems or conditions within the work area or activity and what improvements can be made
		1.6	Identify and confirm improvements within the working area/activity which cover three of the following: <ul style="list-style-type: none"> <li>• Reduction in cost</li> <li>• Improved health, safety and/or working environment</li> <li>• Improved quality</li> <li>• Improved regulatory compliance</li> <li>• Improvements to working practices</li> <li>• Reduction in lead time</li> <li>• Reduction in waste and/or energy usage</li> <li>• Improved customer service</li> <li>• Improve resource utilisation</li> </ul>
		1.7	Co-ordinate and carry out a structured waste elimination activity, based on the identified waste problems or conditions
		1.8	Produce changes to standard operating procedures, or other approved documentation that will sustain the improvements resulting from the Kaizen activity
		1.9	Identify and apply improvements which cover three of the following: <ul style="list-style-type: none"> <li>• Cleaning of equipment or work area</li> <li>• Maintenance of equipment</li> <li>• Health and safety</li> <li>• Process procedures</li> <li>• Manufacturing operations or work area operations</li> <li>• Quality system</li> <li>• Regulatory compliance systems</li> </ul>

		1.10	Determine and calculate measures of performance for quality, cost and delivery
		1.11	Determine and calculate one of the following quality measures: <ul style="list-style-type: none"> <li>• Not right first time (as a percentage or as parts per million(PPM))</li> <li>• Company-specific quality measure</li> </ul>
		1.12	Determine and calculate one of the following measures: <ul style="list-style-type: none"> <li>• Delivery schedule achievement</li> <li>• Company-specific delivery or service measure</li> </ul>
		1.13	Determine and calculate one of the following cost measures: <ul style="list-style-type: none"> <li>• Parts per operator hour</li> <li>• Production volume</li> <li>• Value added per person</li> <li>• Overall equipment effectiveness</li> <li>• Stock turns</li> <li>• Floor space utilisation</li> <li>• Cost breakdown</li> <li>• Company-specific cost measure</li> </ul>
		1.14	Calculate and visually represent the optimum resources required for a process based on customer demand
		1.15	Provide comparisons of the agreed work area/activity before and after the Kaizen activity to confirm improvements using key performance indicators
		1.16	Record and show business improvements, using one of the following key performance indicators: <ul style="list-style-type: none"> <li>• Not right first time(as a percentage or as parts per million (PPM))</li> <li>• Company-specific quality measure</li> <li>• Delivery schedule achievement</li> <li>• Company-specific delivery measure</li> <li>• Parts per operator hour</li> <li>• Production volume</li> <li>• Value added per person</li> <li>• Overall equipment effectiveness</li> <li>• Stock turns</li> <li>• Floor space utilisation</li> <li>• Cost breakdown</li> <li>• Company-specific cost measure</li> </ul>
2	Understand how to apply continuous improvement techniques (Kaizen)	2.1	Describe the health and safety requirements of the area in which they are carrying out the Kaizen activity

	2.2	Explain how a work area/activity is selected for the Kaizen activity
	2.3	Describe the principles for the deployment of Kaizen such as where a culture focuses on sustained continuous improvement, aiming at eliminating waste in all systems and processes in the organisation and supply chain)
	2.4	Describe the eight wastes (over-production, inventory, transport, over-processing, waiting time, operator motion, bad quality failure to exploit human potential) and how to eliminate them
	2.5	Describe problem solving and root cause analysis
	2.6	Describe the importance of understanding the process/activity under review, and how this will affect the quality of the problem solving
	2.7	Describe the application of the Deming cycle (plan, do, check, act)
	2.8	Explain how to carry out a Kaizen activity and establish measureable improvements
	2.9	Explain how to distinguish facts from opinions in order to identify improvement actions
	2.10	Explain how improvements to the process are achieved by engaging the knowledge and experience of the people involved in the process
	2.11	Explain how to encourage people to identify potential improvements
	2.12	Explain how to evaluate improvement ideas in order to select those that are to be pursued
	2.13	Explain how to set quantifiable targets and objectives
	2.14	Explain how to produce/propose the creation of changes to standard operating procedures or other approved documentation
	2.15	Describe the techniques used to visually communicate the work of the Kaizen activity to participants and others

	2.16	Describe the application of the business' key measures of competitiveness such as the former DTI's seven measures: delivered right first time, delivery schedule achievement, people productivity, stock turns, overall equipment effectiveness, value added per person, floor space utilisation
	2.17	Explain how the cycle time of a process can be defined
	2.18	Explain how to calculate the required production rate for a process by using a calculation such as Takt time
	2.19	Explain how to calculate the optimal resources such as people, equipment, facilities and materials required for a process based on customer demand
	2.20	Describe the techniques used to distribute work content to balance cycle times to the rate of customer demand, and how to visually represent it
	2.21	Describe the extent of their own authority and to whom they should report to in the event of problems that they cannot resolve

T/615/4802

Developing Visual Management Systems

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**Unit Status** Optional**Unit Level** 3**Credit Value** 5**Guided Learning** 41 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Develop visual management systems
- ✓ Understand how to develop visual management systems

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Develop visual management systems	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Identify and confirm appropriate parts of the process or work area that will have visual controls
		1.3	Create or make changes to visual management systems
		1.4	Identify and confirm the key performance indicators that will be displayed in the work area
		1.5	Produce or make changes to standard operating procedures and visual controls that everyone works to within the area
		1.6	Create and update visual management systems that promote six of the following: <ul style="list-style-type: none"> <li>• Health and safety</li> <li>• Quality/zero defects</li> <li>• Process concerns or corrective actions</li> <li>• Performance measures</li> <li>• Standard operating procedures</li> <li>• Workplace organisation</li> <li>• Skills matrices</li> <li>• Autonomous maintenance worksheets</li> <li>• Parts/material control systems</li> <li>• Problem resolution (eg. Kaizen boards)</li> <li>• Shadow boards</li> <li>• Standard work in progress locations and quantities</li> <li>• Planning systems</li> <li>• The delivery of effective meetings</li> </ul>
		1.7	Measure the effectiveness of the visual management system and maintain the quality of information being displayed
2	Understand how to develop visual management systems	2.1	Describe the health and safety requirements of the work area in which visual management activities are being conducted
		2.2	Describe the factors to be considered when selecting a visual management system
		2.3	Explain where to find the information required to develop a local visual management system

		2.4	Describe the visual management systems available to create 'the visual factory' such as using Kanban systems, card systems, colour coding, floor footprints, graphs, team board
		2.5	Explain how to differentiate between business performance measures and local performance measures
		2.6	Describe the measures of performance in a lean business environment such as health, safety and the environment, right first time, cost, delivery, responsiveness, process concerns and corrective actions, performance measures, workplace organisation
		2.7	Describe the application of measurement techniques required for communicating the visual management within an area and to others who may use the information such as target versus actual, % right first time, Pareto analysis, bar charting, action plans, Paynter charts
		2.8	Describe the extent of own authority and to whom they should report in the event of problems that cannot be resolved



J/615/4805

Carrying Out Problem Solving Activities

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**Unit Status** Optional**Unit Level** 3**Credit Value** 5**Guided Learning** 41 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Carry out problem solving activities
- ✓ Understand how to carry out problem solving activities

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Carry out problem solving activities	1.1	Take prompt action to identify the nature and extent of the problems that arise
		1.2	Carry out all of the following as part of the problem solving activity: <ul style="list-style-type: none"> <li>• Ensure that performance monitoring/measurement and review processes are in place</li> <li>• Utilise a team base approach for the problem solving activity</li> <li>• Discuss/consult with the relevant people on the nature and extent of the problem</li> <li>• Follow a structured problem solving process and use appropriate techniques to identify the root cause(s)</li> <li>• Communicate the proposed corrective action to the relevant people obtaining feedback where appropriate</li> <li>• Prepare a plan of action for implementation of the appropriate corrective action</li> <li>• Monitor the implementation of corrective actions and make necessary revisions to the plan of action (plan, do, check, act)</li> <li>• Monitor the effectiveness of corrective actions against the costs of implementation</li> <li>• Review the problem solving process to understand the lessons learned in order to achieve further improvements within the business</li> </ul>
		1.3	Obtain all relevant data and information relating to the problem
		1.4	Obtain and use data on the problem from four of the following sources: <ul style="list-style-type: none"> <li>• Statistical data</li> <li>• Historical records</li> <li>• Quality audits</li> <li>• External sources</li> <li>• Feedback from customers</li> <li>• Mapping the process</li> <li>• Operating procedures/manufacturing manuals</li> <li>• Company procedures</li> <li>• Health and safety information</li> <li>• Environmental documents</li> <li>• Observation</li> </ul>

		<ul style="list-style-type: none"> <li>Designed and controlled trials/experiments</li> </ul>
	1.5	<p>Establish possible root causes to problems by two of the following methods/techniques:</p> <ul style="list-style-type: none"> <li>Cause and effect diagram</li> <li>Five 'why' analysis</li> <li>Flowcharting</li> <li>Fault tree analysis</li> </ul>
	1.6	Evaluate all realistic root causes of the problem
	1.7	Identify the most effective corrective action
	1.8	<p>Evaluate possible corrective actions to problems by considering all of the following:</p> <ul style="list-style-type: none"> <li>Operational effectiveness</li> <li>Ease of implementation</li> <li>Financial impact</li> <li>Functionality of the system</li> <li>Environmental impact</li> <li>Staffing implications</li> <li>Quality implications</li> <li>Conformity with company policies</li> <li>Health and safety implications</li> <li>Customer delivery implications</li> </ul>
	1.9	Ensure that corrective actions are implemented correctly and promptly
	1.10	<p>Implement corrective actions to problems which comply with one of the following:</p> <ul style="list-style-type: none"> <li>Company standards and procedures</li> <li>BS and/or ISO standards and procedures</li> <li>Customer standards and requirements</li> </ul>
	1.11	<p>Monitor the effectiveness of corrective actions by using one of the following:</p> <ul style="list-style-type: none"> <li>One or more of the former DTI's seven measures of QCD</li> <li>One or more of the seven quality tools</li> <li>Statistical Process Control</li> </ul>
	1.12	Keep all relevant people informed of progress throughout the problem solving activity
	1.13	<p>Communicate with the relevant people throughout the problem solving activity by using both of the following:</p> <ul style="list-style-type: none"> <li>Verbal communication</li> </ul>

			<ul style="list-style-type: none"> <li>Completion of company specific documentation</li> </ul>
		1.14	Ensure that corrective actions to problems comply with all relevant regulations and guidelines
2	Understand how to carry out problem solving activities	2.1	Describe the health and safety requirements of the area in which the problem solving activities are being completed
		2.2	Describe the importance of wearing protective clothing and other appropriate safety equipment during the investigation of the problem and where it may be obtained
		2.3	Describe the methods used to detect that a problem has occurred
		2.4	Describe the methods of containment of a non-conforming product or process
		2.5	Describe the structured process for problem solving such as DMAIC methodology
		2.6	Describe the processes and procedures used within the scope of the problem solving activity
		2.7	Explain how to obtain any necessary resources to support the problem solving activity
		2.8	Describe the extent of own responsibility and to whom to report if problems cannot be resolved
		2.9	Describe the use of performance measurement and analysis to direct and focus improvement effort
		2.10	Describe the techniques used to obtain data and information on problems and the sources of information
		2.11	Describe the methods and techniques involved in evaluating information such as the seven quality tools, is/is not sheets, capability studies, measurement system analysis
		2.12	Describe the importance of getting to the root cause

	2.13	Describe the methods and techniques involved in root cause analysis such as 5 'why' analysis, cause and effect diagrams, fault tree analysis, flowcharting, FMEA, process flow analysis
	2.14	Describe the criticality of different types of problem and how to prioritise the problems to be solved
	2.15	Explain how to obtain and interpret company policy and procedures
	2.16	Describe the factors that have to be taken into account when selecting the corrective action to a problem
	2.17	Describe the methods used to choose and implement corrective actions such as decision matrix, design of experiments, Gantt chart, Deming cycle, error proofing
	2.18	Explain whom to inform of actions taken and by what means
	2.19	Describe the reporting procedures and documentation and their application
	2.20	Describe the methods used to monitor the effectiveness of corrective actions such as statistical process control, the former DTI's seven measures of QCD, seven quality tools
	2.21	Explain how to review the problem solving process to understand the lessons learned in order to achieve further improvements within the business

R/615/4807

Analysing and Selecting Parts for Improvement

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**Unit Status** Optional**Unit Level** 3**Credit Value** 6**Guided Learning** 58 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Analyse and select parts for improvement
- ✓ Understand how to analyse and select parts for improvement

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Analyse and select parts for improvement	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Obtain all the information, documentation and equipment required to carry out the activity
		1.3	Co-ordinate and analyse information to identify and confirm the representative parts of improvement within the chosen area/product range
		1.4	Carry out an analysis against three of the following criteria: <ul style="list-style-type: none"> <li>• Customer schedules (volume)</li> <li>• Cost of producing the part</li> <li>• Profit for each part as a percentage</li> <li>• Manufacturing lead time</li> <li>• Quality (scrap and non-conformance percentage)</li> <li>• Process/manufacturing route</li> </ul>
		1.5	Evaluate and group the identified parts into appropriate part families
		1.6	Produce part families using all the following criteria: <ul style="list-style-type: none"> <li>• Part shape</li> <li>• Part size</li> <li>• Materials used to manufacture the part</li> <li>• Manufacturing process</li> </ul>
		1.7	Produce and confirm a finalised list of the representative parts for the chosen area/product range
2	Understand how to analyse and select parts for improvement	2.1	Describe the health and safety requirements of the work area in which activities are being conducted
		2.2	Describe the information required to conduct the activity and where and from whom authority can be found
		2.3	Describe the principles and process of analysis such as pie charts, bar charts (Pareto analysis)
		2.4	Describe the techniques used to communicate the information and results gained by this process
		2.5	Explain how to create and present bar graphs/histograms

		2.6	Explain how to differentiate between lead time and cycle time
		2.7	Explain how the bill of materials structure is configured for each of the representative parts
		2.8	Explain how to identify the origin/source of the parts within the chosen area
		2.9	Explain how to evaluate the information in order to select the representative parts of the chosen area
		2.10	Describe the application of problem solving and root cause analysis
		2.11	Describe the extent of own authority and to whom to report in the event that problems cannot be resolved



H/615/4844

Apply Lead Time Analysis

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**Unit Status** Optional**Unit Level** 3**Credit Value** 5**Guided Learning** 42 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply lead time analysis
- ✓ Understand how to apply lead time analysis

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply lead time analysis	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Collect and co-ordinate information/data to produce a frequency diagram, listing the major bottlenecks or constraints as identified by each lead time profile
		1.3	Define and confirm quantifiable objectives and targets for the reduction in lead time of the chosen parts or processes
		1.4	Co-ordinate the lead time analysis and the production of lead time profiles for all of the representative parts or processes chosen
		1.5	Identify and confirm any problems or conditions within the work area where improvements can be made
		1.6	Identify improvement opportunities for three of the following: <ul style="list-style-type: none"> <li>• Supply or delivery of parts</li> <li>• Improved workflow</li> <li>• Improved quality</li> <li>• Flexibility of people</li> <li>• Launch of material</li> <li>• Inventory balancing</li> </ul>
		1.7	Produce revised lead time profiles identifying the improved process
		1.8	Produce a plan of the improvement activities and resources required with timescales to achieve the targeted lead time
2	Understand how to apply lead time analysis	2.1	Describe the health and safety requirements of the work area in which the activities are being conducted
		2.2	Describe the sort of information required to create lead time profiles
		2.3	Describe the sort of information required to construct the lead time profiles and where this information can be obtained
		2.4	Explain how to co-ordinate and create lead time profiles

		2.5	Explain how to co-ordinate and create frequency charts
		2.6	Describe the techniques used to communicate the information and results obtained by this process
		2.7	Explain how to differentiate between lead time and cycle time
		2.8	Describe the application of problem solving and root cause analysis such as Ishikawa diagrams, brainstorming
		2.9	Describe the extent of own authority and to whom to report in the event problems cannot be resolved

T/615/4816

Carry Out Value Stream Mapping

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	6
<b>Guided Learning</b>	58 hours

**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Carry out Value Stream Mapping
- ✓ Understand how to carry out Value Stream Mapping

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Carry out Value Stream Mapping	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Select appropriate parts or materials on which to carry out the activity
		1.3	Carry out the value stream mapping process on the chosen parts using appropriate improvement tools and techniques
		1.4	Create a current state map for the parts or materials chosen which includes all of the following: <ul style="list-style-type: none"> <li>• Part or material flow through the process</li> <li>• Information flow</li> <li>• Inventory</li> <li>• Set-up and cycle times for each operation</li> <li>• Lead time for the part or material</li> <li>• Value adding percentage of lead time</li> <li>• Delays which occur between each operation</li> <li>• Takt time and schedules for the chosen part</li> <li>• Customer and supplier ordering and delivery</li> </ul>
		1.5	Identify problems or conditions within the current state map where improvements can be made
		1.6	Identify opportunities for improvements and waste that needs to be removed in order to create a future state map covering three of the following: <ul style="list-style-type: none"> <li>• Improved workflow</li> <li>• Improved lead time</li> <li>• Improved quality</li> <li>• Improved safety</li> <li>• Less inventory</li> <li>• Improved flexibility</li> <li>• Less waste/cost</li> </ul>
		1.7	Produce a future state map which includes all of the following: <ul style="list-style-type: none"> <li>• Part or material flow through the process</li> <li>• Information flow</li> <li>• Inventory</li> <li>• Set-up and cycle times for each operation</li> <li>• Lead-time for the part or material</li> <li>• Value adding percentage of lead time</li> <li>• Delays which occur between each operation</li> </ul>

			<ul style="list-style-type: none"> <li>• Takt time and schedules for the chosen part</li> <li>• Customer and supplier ordering and delivery</li> </ul>
		1.8	Implement the changes identified
2	Understand how to carry out Value Stream Mapping	2.1	Describe the health and safety requirements of the area in which the value stream mapping activities are being conducted
		2.2	Explain how a part is selected for a value stream mapping activity
		2.3	Describe from whom authority is gained for release of people and resources for the value stream mapping activity
		2.4	Explain how to structure and run a value stream mapping event
		2.5	Describe the principles and processes for the deployment of value stream mapping
		2.6	Explain how improvements to the process can be achieved
		2.7	Explain how to evaluate improvement ideas and select those that will give the greatest benefit for the least spend
		2.8	explain how to set quantifiable objectives and targets for the future state maps
		2.9	Explain how to create standard operating procedures
		2.10	Describe the techniques used to visually communicate the information and results of the process
		2.11	Describe the techniques of problem solving and root cause analysis
		2.12	Describe systems lead time, how they differ from actual lead time, and how both are constructed
		2.13	Explain how to calculate Takt time
		2.14	Describe the principles of increasing process capacity
		2.15	Explain what constitutes value adding and non-value adding activities
		2.16	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved

F/615/4818

Apply Set-up Reduction Techniques

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**Unit Status** Optional**Unit Level** 3**Credit Value** 6**Guided Learning** 58 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply set-up reduction techniques
- ✓ Understand how to apply set-up reduction techniques

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply set-up reduction techniques	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Identify a machine or process set-up activity that is a bottleneck or constraint which affects productivity
		1.3	Co-ordinate and carry out the set-up reduction activity on the chosen machine or process using the appropriate techniques
		1.4	Identify and confirm problems or conditions within the current set-up where improvements can be made
		1.5	Define quantifiable objectives/targets for improvements to the chosen set-up
		1.6	Make improvements to the current set-up which cover three of the following: <ul style="list-style-type: none"> <li>• Reduced set-up time</li> <li>• Improved safety</li> <li>• Improved quality</li> <li>• Improved work practice</li> <li>• Improved regulatory compliance</li> <li>• Reduced cost</li> </ul>
		1.7	Co-ordinate improvements to the current set-up to meet the identified objectives and targets
		1.8	Produce changes to standard operating procedures or other approved documentation that will sustain the improvements made to the set-up requirements
		1.9	Identify and apply improvements to the new set-up which covers three of the following: <ul style="list-style-type: none"> <li>• All of the new steps and the time required for each step</li> <li>• Differentiation between internal and external steps</li> <li>• Standard equipment and its location, eg. cutting tools, clamps, hand tools, inspection equipment</li> <li>• Information required for a quick set-up and its location such as CNC programmes, drawings and manufacturing instructions</li> <li>• Methods and standards</li> </ul>



			<ul style="list-style-type: none"> <li>Documentation for co-ordination control</li> </ul>
2	Understand how to apply set-up reduction techniques	2.1	Describe the health and safety requirements of the area in which the set-up reduction activities are being conducted
		2.2	Explain how a machine or process is selected for a set-up reduction activity
		2.3	Describe from whom authority is gained for the release of people and resources for the set-up reduction activity
		2.4	Describe the application of the Deming cycle (plan, do, check, act)
		2.5	Explain how to structure and run a set-up reduction activity
		2.6	Explain how improvements to the set-up can be achieved
		2.7	Explain how to evaluate improvement ideas and select those that will give most benefit for the least spend
		2.8	Explain how to set quantifiable targets and objectives for the improved set-up
		2.9	Explain how to correlate information to create or update standard operating procedures or other approved documentation for the revised set-up
		2.10	Explain how to distinguish between internal and external activities with reference to set-up
		2.11	Describe problem solving and the application of root cause analysis
		2.12	Describe the difference between 'motion' and 'work'
		2.13	Explain what constitutes a value adding and non-value adding activity
		2.14	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved

F/615/4821

Apply Total Productive Maintenance (TPM)

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	6
<b>Guided Learning</b>	54 hours

**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply Total Productive Maintenance
- ✓ Understand how to apply Total Productive Maintenance

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply Total Productive Maintenance	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Select appropriate asset on which to carry out the total productive maintenance activity
		1.3	Carry out the total productive maintenance process on at least two assets from the following: <ul style="list-style-type: none"> <li>• Plant and equipment</li> <li>• Machines</li> <li>• Office equipment</li> <li>• Service equipment</li> <li>• Utilities</li> </ul>
		1.4	Obtain the necessary information to carry out the activity
		1.5	Carry out the total productive maintenance activity by applying the appropriate techniques
		1.6	Carry out the total productive maintenance process and show how one of the following is undertaken: <ul style="list-style-type: none"> <li>• Assess criticality of equipment/process condition and identify refurbishment needs</li> <li>• Identify an integrated asset care plan for both operator and maintenance staff</li> </ul>
		1.7	Calculate and use the overall equipment effectiveness (OEE) measure and information to determine which elements of the OEE and their associated losses need improvement
		1.8	Collect information relating to all of the following: <ul style="list-style-type: none"> <li>• Load or demand</li> <li>• Capacity</li> <li>• Takt time or bottleneck analysis</li> </ul>
		1.9	Develop and use an action plan which will reduce/eliminate the losses and hence improve the overall equipment effectiveness
		1.10	Implement improvements to working practices through the total productive maintenance activities

		111	<p>Show improvements to working practices through three of the following:</p> <ul style="list-style-type: none"> <li>• Initial cleaning</li> <li>• Countermeasures for cause and effect of dust and dirt</li> <li>• Cleaning and lubrication standards</li> <li>• General inspection</li> <li>• Autonomous inspection</li> <li>• Workplace organisation</li> <li>• Full circle implementation of autonomous maintenance</li> </ul>
		1.12	<p>Carry out all of the following total productive maintenance activities:</p> <ul style="list-style-type: none"> <li>• Autonomous maintenance (front line asset care)</li> <li>• Condition based maintenance (predictive)</li> <li>• Planned maintenance steps (fixed interval)</li> </ul>
2	Understand how to apply Total Productive Maintenance	2.1	Describe the health and safety requirements of the area in which the total productive maintenance activities are being completed
		2.2	Describe the principles of TPM and how they can be applied in administration procedures, safety improvement and quality maintenance
		2.3	Explain how to select an asset on which to carry out the TPM activity (assets could be plant and equipment, machines, office equipment, service equipment, utilities)
		2.4	Explain how to implement a systematic and structured approach to carrying out autonomous, condition based and planned maintenance
		2.5	Describe the difference between a chronic and sporadic loss and the countermeasures to both
		2.6	Explain how to calculate overall equipment effectiveness (OEE)
		2.7	Explain where to find the information required to calculate the OEE for the chosen asset
		2.8	Describe the benefits of having a total productive maintenance system
		2.9	Describe the importance of taking ownership of the TPM system and the

			issues that can be expected to be resolved
		2.10	Describe the six major losses and how loss reduction actions need to be prioritised
		2.11	Describe the use of standard operating procedures, single point lessons and machine/process start-up and shutdown procedures
		2.12	Explain how an awareness of the improvement activities will drive the implementation of the TPM activities (Kaizen and team working)
		2.13	Describe the critical processes and early problem detection steps
		2.14	Describe the loss areas and opportunities for improvement
		2.15	Describe the standards of wear and the ability to stabilise the component life
		2.16	Describe the techniques of visual management used to communicate the information and results obtained by this process (including TPM activity boards and checklists)
		2.17	Describe the integration with workplace organisation and improving OEE
		2.18	Describe the contaminants and sources of contaminants
		2.19	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved

Y/615/4825

Apply Flow Process Analysis

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**Unit Status** Optional**Unit Level** 3**Credit Value** 6**Guided Learning** 58 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply flow process analysis
- ✓ Understand how to apply flow process analysis

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply flow process analysis	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Co-ordinate and carry out the process flow analysis mapping activity within a given work area
		1.3	Produce a flow process analysis sheet
		1.4	Identify and record the opportunities for improvement within the process
		1.5	Evaluate the opportunities for improvement and prioritise these using suitable criteria
		1.6	Analyse the data obtained into both: <ul style="list-style-type: none"> <li>• Non-value added activity</li> <li>• Value added activity</li> </ul>
		1.7	Define quantifiable objectives and targets for all the defined improvement activities
		1.8	Create and agree an action plan which: <ul style="list-style-type: none"> <li>• Eliminates non-value added activity</li> <li>• Simplifies value added activity</li> </ul>
2	Understand how to apply flow process analysis	2.1	Describe the health and safety requirements of the area in which the flow process analysis activities are being completed
		2.2	Explain how to describe a process in its elements/activities of work
		2.3	Describe the eight forms of waste within a lean working environment
		2.4	Describe the symbols and abbreviations used for flow process analysis such as those defined by the American Standard for Methods Engineering – to include operation, inspection, transport, waiting, storage
		2.5	Explain how to map out a process or deployment flowchart, using the recognised symbols
		2.6	What are classed as value-added and non-value added activities
		2.7	Explain how to establish which of the elements/activities in the process are value added or non-value added

		2.8	Explain how to identify opportunities for improvements to the process
		2.9	Explain how to use data to eliminate activities that do not add value to the process
		2.10	Explain how to construct an action plan that will simplify the value added activities and eliminate the non-value added activities
		2.11	Explain how to construct an action plan such as payback matrix
		2.12	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved



H/615/4827

Apply Policy Deployment (Hoshin Kanri, quality operating systems, business plan deployment)

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	5
<b>Guided Learning</b>	42 hours

**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply policy deployment (Hoshin Kanri, quality operating systems, business plan deployment)
- ✓ Understand how to apply policy deployment (Hoshin Kanri, quality operating systems, business plan deployment)

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

**Unit Content**

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply policy deployment (Hoshin Kanri, quality operating systems, business plan deployment)	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Obtain the current policy deployment plan
		1.3	Carry out the policy deployment process in own local area and define the area goals
		1.4	Define the area goals for: <ul style="list-style-type: none"> <li>• Customers</li> <li>• Own business</li> </ul>
		1.5	Identify improvement opportunities and conditions which, when implemented, deliver the local area policy deployment plan
		1.6	Use at least four of the following criteria when identifying improvement opportunities: <ul style="list-style-type: none"> <li>• Is there local commitment to deliver the improvement plan?</li> <li>• Is the plan communicated to everyone in the business?</li> <li>• Are all employees aware of and engaged in the local policy plan?</li> <li>• Do local measure reflect policy deployment plans?</li> <li>• Are policy review dates adhered to?</li> <li>• Are cross-functional boundaries eliminated?</li> <li>• Are improvement actions linked to the policy deployment plan?</li> </ul>
		1.7	Produce quantifiable objectives and targets for all the defined improvement activities with an appropriate measure and timescale for completion
		1.8	Produce and communicate the plan in an appropriate visual format
		1.9	Create a visual communication of the plans which must include all of the following: <ul style="list-style-type: none"> <li>• The resources required</li> <li>• Measures of performance</li> <li>• Timescales for completion</li> <li>• Review dates of each activity</li> <li>• Assigned ownership and responsibility for each action</li> <li>• The order of importance of each improvement activity</li> </ul>

2	Understand how to apply policy deployment (Hoshin Kanri, quality operating systems, business plan deployment)	2.1	Describe the health and safety requirements of the area in which the improvement activities are being completed
		2.2	Explain where to find the information required to develop a local policy deployment plan
		2.3	Explain how to create policy deployment plans
		2.4	Describe the techniques used to communicate the information and results obtained by this process
		2.5	Explain how to differentiate between own business vision, mission and main business drivers
		2.6	Describe the measures of performance in a lean business environment
		2.7	Describe the limits of own responsibility and involvement in the policy deployment planning process
		2.8	Describe the types of improvement activity that will drive the implementation of the business plan, eg. management tools and techniques which contribute to quality, cost, delivery and responsiveness
		2.9	Describe the meaning and application of the Deming cycle (plan, do, check, act)
		2.10	Describe the application of gap analysis (current situation versus desired situation)
		2.11	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved

M/615/4829

Creating Standard Operating Procedures

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**Unit Status** Optional**Unit Level** 3**Credit Value** 5**Guided Learning** 42 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Create standard operating procedures
- ✓ Understand how to create standard operating procedures

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Create standard operating procedures	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Produce a standard operating procedure for one of the following: <ul style="list-style-type: none"> <li>• Cleaning of equipment</li> <li>• Maintenance of equipment</li> <li>• Health, safety and environmental practices and procedures</li> <li>• Process procedures</li> <li>• Manufacturing operations</li> <li>• Quality improvements</li> <li>• Improvements to customer satisfaction</li> </ul>
		1.3	Produce standard operating procedures that include all of the following: <ul style="list-style-type: none"> <li>• Operation/process to be performed</li> <li>• Part/product number and part/product description/operation reference</li> <li>• Operation/process number</li> <li>• Preparation activities prior to starting the operation/process</li> <li>• Description of the full operation/process, broken down into appropriate tasks/activities</li> <li>• Quality standards, health and safety requirements, environmental issues/requirements</li> <li>• Tooling/fixtures/gauges/equipment required</li> <li>• Sketches/photographs/drawings that assist completion of the operation/process</li> <li>• Date of first issue</li> <li>• Originator of the document</li> <li>• Latest revision date</li> </ul>
		1.4	Co-ordinate and analyse the gathering of information of the current operation or process to identify the optimum and safest method
		1.5	Confirm what tools, equipment, fixtures, documentation and standards are required
		1.6	Ensure that all operators performing the operation or process have the opportunity to contribute and agree the method identified
		1.7	Produce standard operating procedures in an agreed format and monitor their

			use against the operation or process requirements
		1.8	Produce standard operating procedures that minimise all of the following: <ul style="list-style-type: none"> <li>• Time</li> <li>• Effort</li> <li>• Waste</li> </ul>
		1.9	Supply standard operating procedures at their point of use and store copies and master copies in accordance with company requirements
		1.10	Revise standard operating procedures as appropriate to ensure their effectiveness in the workplace
		1.11	Confirm that the method defined will meet quality, productivity, health, safety and environmental requirements
2	Understand how to create standard operating procedures	2.1	Describe the health and safety requirements of the area in which the standard operating procedures are being created
		2.2	Describe the various formats used in creating SOP
		2.3	Explain where to find the SOP document format to be used in own business
		2.4	Describe the information that will be required to create a SOP
		2.5	Explain how SOP are structured and the importance of their use
		2.6	Describe the methods of communicating/facilitating to ensure that all the required information for the SOP is captured
		2.7	Describe the operation/process to be captured in the SOP
		2.8	Explain why SOP are the basis for quality and continuous improvement
		2.9	Describe the eight wastes (over-production, inventory, transport, over-processing, waiting time, operator motion, bad quality, failure to exploit human potential) and how to eliminate them

		2.10	Explain how to simplify work done eliminating waste and potential for human error
		2.11	Describe Takt time and the relationship with achieving flow in a process
		2.12	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved

K/615/4831

Apply Basic Statistical Analysis

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**Unit Status** Optional**Unit Level** 3**Credit Value** 4**Guided Learning** 36 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply basic statistical analysis
- ✓ Understand how to apply basic statistical analysis

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply basic statistical analysis	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Consult with appropriate people and gather the relevant data for statistical analysis
		1.3	Produce data gathering forms or charts to gather information to enable statistical and graphical analysis to take place
		1.4	Record the collected data utilising three of the following methods: <ul style="list-style-type: none"> <li>• Bar charts</li> <li>• Histograms</li> <li>• Pareto diagrams</li> <li>• Stem and leaf diagrams</li> <li>• Box plots</li> <li>• Time series charts</li> </ul>
		1.5	Utilise statistical and graphical analysis on a Six Sigma project
		1.6	Produce descriptive statistics of data to include all of the following: <ul style="list-style-type: none"> <li>• Mean</li> <li>• Median</li> <li>• Mode</li> <li>• Standard deviation</li> <li>• Range and variance</li> </ul>
		1.7	Produce a normal distribution to assess a population from the representative sample
		1.8	Interpret the statistical data collects in order to validate the pre-determined courses of action
		1.9	Produce an action plan as a result of the statistical and graphical analysis undertaken
2	Understand how to apply basic statistical analysis	2.1	Describe the health and safety requirements of the area in which data is being collected
		2.2	Describe the meaning of 'variation', how this can be detected with statistics and how this variation can affect a process

		2.3	Describe the number of data points needed to draw a statistically valid conclusion
		2.4	Explain why we need to use basic statistics
		2.5	Describe the meaning of the terms 'population' and 'sample' when applied to basic statistics
		2.6	Describe distribution curves and the properties of a normal curve
		2.7	Explain how to create and use charts and diagrams such as histograms, box plots time series charts, Pareto diagrams, stem and lead diagrams
		2.8	Explain how to calculate mean, median, mode, standard deviation, range and variance
		2.9	Describe the difference between descriptive and inferential statistics
		2.10	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved

T/615/4833

## Apply Failure Modes and Effects Analysis (FMEA)

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 5

**Guided Learning** 42 hours

### Unit Overview and Main Outcomes

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply Failure Modes and Effects Analysis (FMEA)
- ✓ Understand how to apply Failure Modes and Effects Analysis (FMEA)

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply Failure Modes and Effects Analysis (FMEA)	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Determine the key features of failure modes and effects analysis required for the activity under investigation
		1.3	Carry out a failure modes and effects analysis on two of the following: <ul style="list-style-type: none"> <li>• Concept</li> <li>• Product</li> <li>• Design</li> <li>• Process</li> <li>• System</li> <li>• Machine</li> </ul>
		1.4	Identify for the activities analysed: <ul style="list-style-type: none"> <li>• The potential failure modes</li> <li>• The potential effects from failure modes</li> <li>• The potential causes of failure modes</li> </ul>
		1.5	Co-ordinate and produce a failure modes and effects analysis
		1.6	Record the information gathered in an appropriate format
		1.7	Identify and score all of the following: <ul style="list-style-type: none"> <li>• The likely occurrence of potential failure modes</li> <li>• The severity of the potential failure modes</li> <li>• The likelihood of detection of the potential failure modes</li> </ul>
		1.8	Make value judgements about the activity using failure modes and effects analysis principles
		1.9	Calculate risk priority number (RPNs), identify high RPNs and develop actions to improve them
		1.10	Establish rating tables for all of the following: <ul style="list-style-type: none"> <li>• Occurrence</li> <li>• Severity</li> <li>• Detection</li> </ul>
		1.11	Reassess a failure modes and effects analysis once actions have been completed and rescore severity, occurrence and detection

2	Understand how to apply Failure Modes and Effects Analysis (FMEA)	2.1	Describe the health and safety requirements of the area in which FMEA is being conducted
		2.2	Describe the main features and benefits of carrying out an FMEA
		2.3	Explain who should be part of a team that constructs and updates an FMEA
		2.4	Describe System FMES, Concept FMES, Design FMEA and Process FMEA – what they are and where they should be used
		2.5	Describe the meaning of failure mode, failure effect and failure cause
		2.6	Describe the rating scale used in FMEA projects, to include the severity rating scale, the occurrence rating scale and the detection rating scale
		2.7	Explain how to calculate a risk priority number (RPN)
		2.8	Explain how to use the RPNs
		2.9	Explain how to apply a structured approach to risk reduction
		2.10	Explain when to start an FMEA
		2.11	Explain when to update an FMEA
		2.12	Describe the roles and responsibilities of individuals within an FMEA team
		2.3	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved

J/615/4836

## Apply Mistake/Error Proofing (Poka Yoke)

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	5
<b>Guided Learning</b>	42 hours

**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Apply mistake/error proofing (Poka Yoke)
- ✓ Understand how to apply mistake/error proofing (Poka Yoke)

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Apply mistake/error proofing (Poka Yoke)	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Use information and data to select and confirm a suitable process on which to carry out mistake/error proofing activity
		1.3	Apply the mistake/error proofing process to the chosen activity
		1.4	Use appropriate techniques to analyse the data received and draw valid conclusions
		1.5	Evaluate recommendations and produce worksheets for the activity that identify the problem and actions to be taken
		1.6	Create a worksheet of the mistake/error proofing activity identifying: <ul style="list-style-type: none"> <li>• The description of the mistake/error identified</li> <li>• The containment action taken</li> <li>• The root cause of the mistake/error</li> <li>• The permanent corrective action to be taken</li> </ul>
		1.7	Determine suitable solutions and conduct agreed trials to measure the effectiveness of the solution
		1.8	Identify the merits of suitable solutions and determine their: <ul style="list-style-type: none"> <li>• Effectiveness</li> <li>• Cost</li> <li>• Complexity</li> </ul>
		1.9	Confirm and co-ordinate the implementation of the optimum solution
		1.10	Measure and document the results
		1.11	Identify the benefits of mistake/error proofing in terms of: <ul style="list-style-type: none"> <li>• Improved quality/compliance such as ISO9001</li> <li>• Reduced costs</li> <li>• Delivery of service</li> </ul>

2	Understand how to apply mistake/error proofing (Poka Yoke)	2.1	Explain how to define a mistake/error proofing activity and the benefits of carrying this out
		2.2	Describe the difference and benefits between mistake/error proofing and prevention and detection
		2.3	Describe the selection criteria used to determine a suitable product or process on which to carry out the mistake/error proofing activity
		2.4	Explain how mistake/error proofing can lead to zero defects
		2.5	Describe the relationship between errors and defects
		2.6	Describe the different types and range of mistakes
		2.7	Explain how defects originate in products or processes
		2.8	Explain how the role of source inspection contributes to the reduction of defects
		2.9	Describe the application of mistake/error proofing (Poka Yoke) tools such as 'cause and effect' and the 5 'whys'
		2.10	Describe the type of mistake/error proofing documentation and the information it should contain
		2.11	Describe the analysis and charting methodology used for mistake/error proofing
		2.12	Describe the financial implications of mistake/error proofing projects
		2.13	Describe the relationship between mistake/error proofing and other continuous improvement processes such as workplace organisation 5S/5C, quick changeovers, cellular manufacturing, total productive maintenance, structured problem solving and visual management
		2.14	Explain how to undertake trials and measure the effectiveness of mistake/error proofing projects
		2.15	Describe the different types and range of mistake proofing devices used



		2.16	Describe the roles and responsibilities of individuals within a mistake/error proofing team including facilitator, timekeeper and scribe
		2.17	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved

R/615/4838

## Carrying Out Statistical Process Control (SPC) Procedures

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 35 hours

### Unit Overview and Main Outcomes

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Carry out Statistical Process Control (SPC) procedures
- ✓ Understand how to carry out Statistical Process Control (SPC) procedures

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Carry out Statistical Process Control (SPC) procedures	1.1	Work safely at all times complying with health and safety and other relevant regulations and guidelines
		1.2	Work to and comply with all the required process monitoring documentation and work instruction sheets
		1.3	Select and/or confirm the process on which the process analysis is to be carried out
		1.4	Consult with relevant people and gather all the necessary data for analysis
		1.5	Apply the principles and processes of statistical process control to the chosen process
		1.6	Perform basic statistical process control using appropriate tools and techniques
		1.7	Utilise statistical and graphical methods to represent the process conditions
		1.8	Calculate the capability of the process identifying: <ul style="list-style-type: none"> <li>• Cp</li> <li>• Cpk</li> </ul>
		1.9	Produce charts for process and control information to include three from: <ul style="list-style-type: none"> <li>• Simple run charts</li> <li>• Tally charts</li> <li>• Bar charts</li> <li>• Histograms</li> <li>• Box plots</li> <li>• Time series charts</li> <li>• Pareto diagrams</li> <li>• Stem and leaf plots</li> <li>• Run charts</li> </ul>
		1.10	Identify activities which will improve the process performance
		1.11	Contribute to the production of an action plan to implement the improvements
2	Understand how to apply mistake/error proofing (Poka Yoke)	2.1	Describe the health and safety requirements of the area in which the process control activities are being carried out

	2.2	Explain where process control fits within a continuous improvement environment
	2.3	Explain how process performance affects customer satisfaction and process costs
	2.4	Explain where and why statistical process control is used, the benefits and how it is applied
	2.5	Describe the importance of standardisation within a process operation and why process performance can only be determined when it is controlled
	2.6	Explain how process control can improve process performance
	2.7	Describe the benefits of prevention and detection
	2.8	Describe the two types of variation within a process (common cause, special cause) and the impact they have within the process
	2.9	Explain how to gather data and effectively analyse it; how the data can be used to communicate abnormalities within the process
	2.10	Describe the main types of control charts used for SPC, their features and benefits and how to construct and implement them
	2.11	Describe the meaning of a 'population' and a 'sample'
	2.12	Describe the measurements of central tendency and variability and how they are calculated
	2.13	Describe the properties of a normal curve of distribution
	2.14	Explain how to create charts or diagrams such as run charts, histograms, box plots, time series charts, Pareto diagrams and stem and lead plots
	2.15	Explain the terms and calculate mean, median, mode, standard deviation, range and variance
	2.16	Explain and calculate process capability (Cp and Cpk)

		2.17	Describe the extent of own authority and to whom to report in the event of problems that cannot be resolved
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# SFEDI<sup>®</sup>AWARDS

## Customer Service

The following units aim to support the development of those skills required to engage with customers in such a way that they wish to continue to purchase the products and services from the business rather than making use of competitors in the marketplace.

D/508/3021

## Organise the Delivery of Reliable Customer Service

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 6

**Guided Learning** 40 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Plan and organise the delivery of reliable customer service
- ✓ Review and maintain customer service delivery
- ✓ Use recording systems to maintain reliable customer service
- ✓ Understand how to organise the delivery of reliable customer service

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Plan and organise the delivery of reliable customer service	1.1	plan, prepare and organise everything they need to deliver services or products to different types of customers
		1.2	organise what they do to ensure that they are consistently able to give prompt attention to your customers
		1.3	reorganise their work to respond to unexpected additional workloads
2	Review and maintain customer service delivery	2.1	maintain service delivery during very busy periods and unusually quiet periods
		2.2	maintain service delivery when systems, people or resources have let them down
		2.3	consistently meet their customers' expectations
		2.4	balance the time they take with their customers with the demands of other customers seeking their attention
		2.5	respond appropriately to their customers when customers make comments about the products or services they are offering
		2.6	alert others to repeated comments made by their customers
		2.7	take action to improve the reliability of their service based on customer comments
		2.8	monitor the action they have taken to identify improvements in the service they give to their customers
3	Use recording systems to maintain reliable customer service	3.1	record and store customer service information accurately following organisational guidelines
		3.2	select and retrieve customer service information that is relevant, sufficient and in an appropriate format
		3.3	quickly locate information that will help solve a customer's query
		3.4	supply accurate customer service information to others using the most appropriate method of communication



4	Understand how to organise the delivery of reliable customer service	4.1	describe organisational procedures for unexpected situations and their role within them
		4.2	describe resource implications in times of staff sickness and holiday periods and their responsibility at these times
		4.3	explain the importance of having reliable and fast information for their customers and their organisation
		4.4	evaluate the organisational procedures and systems for delivering customer service
		4.5	identify useful customer feedback and explain how to decide which feedback should be acted on
		4.6	describe how to communicate feedback from customers to others
		4.7	evaluate the organisational procedures and systems for recording, storing, retrieving and supplying customer service information
		4.8	explain the legal and regulatory requirements regarding the storage of data

A/508/3026

Work with Others to Improve Customer Service

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**Unit Status** Optional**Unit Level** 3**Credit Value** 8**Guided Learning** 53 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Improve customer service by working with others
- ✓ Monitor their own performance when improving customer service
- ✓ Monitor team performance when improving customer service
- ✓ Understand how to work with others to improve customer service

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	improve customer service by working with others	1.1	contribute constructive ideas for improving customer service
		1.2	identify what they have to do to improve customer service and confirm this with others
		1.3	agree with others what they have to do to improve customer service
		1.4	co-operate with others to improve customer service
		1.5	keep their commitments made to others
		1.6	make others aware of anything that may affect plans to improve customer service
2	monitor their own performance when improving customer service	2.1	discuss with others how what they do affects customer service performance
		2.2	identify how the way they work with others contributes towards improving customer service
3	monitor team performance when improving customer service	3.1	discuss with others how teamwork affects customer service performance
		3.2	work with others to collect information on team customer service performance
		3.3	identify with others how customer service teamwork could be improved
		3.4	take action with others to improve customer service performance
4	understand how to work with others to improve customer service	4.1	describe who else is involved either directly or indirectly in the delivery of customer service
		4.2	describe the roles and responsibilities of others in their organisation
		4.3	describe the roles of others outside their organisation who have an impact on their services or products
		4.4	evaluate what the goals or targets of their organisation are in relation to customer service and how these are set

		4.5	evaluate how their organisation identifies improvements in customer service
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Y/615/4839

Improve the Customer Relationship

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**Unit Status** Optional**Unit Level** 3**Credit Value** 7**Guided Learning** 30 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Improve communication with customers
- ✓ Balance the needs of the customer and the organisation
- ✓ Exceed customer expectations to develop the relationship
- ✓ Understand how to improve the customer relationship

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Improve communication with the customer	1.1	Select and use the best method of communication to meet the customers' expectations
		1.2	Take the initiative to contact customers to update them when things are not going to plan or when they require further information
		1.3	Adapt communication to respond to individual customers' feelings
2	Balance the needs of the customer and the organisation	2.1	Meet the customers' expectations within the organisation's service offer
		2.2	Explain the reasons to customers sensitively and positively when customer expectations cannot be met
		2.3	Identify alternative solutions for customers either within or outside the organisation
		2.4	Identify the costs and benefits of these solutions to the organisation and the customer
		2.5	Negotiate and agree solutions with customers which satisfy them and are acceptable to the organisation
		2.6	Take action to satisfy customers with the agreed solution when balancing customer needs with those of the organisation
3	Exceed customer expectations to develop the relationship	3.1	Make extra efforts to improve the relationship with the customer
		3.2	Recognise opportunities to exceed the customers' expectations
		3.3	Take action to exceed the customers' expectations within the limits of own responsibility
		3.4	Gain the help and support of others to exceed customers' expectations
4	Understand how to improve the customer relationship	4.1	Describe how to make best use of the method of communication chosen for dealing with customers

		4.2	Explain how to negotiate effectively with customers
		4.3	Explain how to assess the costs and benefits to customers and the organisation of an unusual agreement
		4.4	Explain the importance of customer loyalty and/or improved internal customer relationships to the organisation

L/615/4840

Use Customer Service as a Competitive Tool

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**Unit Status** Optional**Unit Level** 3**Credit Value** 5**Guided Learning** 35 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Organise customer service to gain a competitive advantage
- ✓ Deliver a competitive service
- ✓ Understand how to use customer service as a competitive tool

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Organise customer service to gain a competitive advantage	1.1	Develop own and colleagues' understanding of the services and products offered by the organisation
		1.2	Define the organisation's service offer and the ways in which it compares with those of competitors
		1.3	Set an example for colleagues and present an image to customers that reinforces the organisation's service offer
		1.4	Encourage customer service actions that create and develop customer loyalty
2	Deliver a competitive service	2.1	Take positive actions and encourage colleagues to take actions that provide individual customers with added value within the organisation's service offer
		2.2	Remind customers about the service offer and the extra benefit it provides over those of competitors
		2.3	Offer additional technical advice to customers within the organisation's service offer
		2.4	Show awareness of the financial implications of any added value actions that could be offered
		2.5	Meet customer service targets to ensure that customers see the benefit of dealing with the organisation rather than a competitor
		2.6	Re-direct customers to other service providers without offence when expectations cannot be met by the organisation's service offer
		2.7	Ensure that customers who have shown a previous interest in repeat and additional services are reminded of this
		2.8	Encourage colleagues to offer complementary services and products when customer satisfaction indicates that customers would be interested in them

3	Understand how to use customer service as a competitive tool	3.1	Identify the factors that lead to customer's belief that they are enjoying value for money
		3.2	Describe the services and products offered by the organisation
		3.3	Describe the services and products offered by competitors
		3.4	Identify the features and benefits of services and products that are seen by customers as added value
		3.5	Explain the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty
		3.6	Explain how to portray a positive image that reinforces the organisation's competitive position
		3.7	Explain the organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position
		3.8	Describe complementary services and products that may be of interest to customers

R/615/4841

## Principles of Customer Service in a Contact Centre

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 26 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand customer service in a contact centre
- ✓ Understand how to resolve issues in customer service in a contact centre
- ✓ Understand how to monitor customer service performance and compliance within a contact centre
- ✓ Understand how to communicate verbally and in written or electronic form with customers referred by others in a contact centre

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand customer service in a contact centre	1.1	Describe the purpose of explaining to customers the features and benefits of products and/or services offered or supported
		1.2	Explain how organisational and regulatory requirements affect the delivery of customer service
		1.3	Describe the importance of having customer service aims, objectives and service offers
		1.4	Explain how to design Key Performance Indicators
2	Understand how to resolve issues in customer service in a contact centre	2.1	Explain how and why customer services issues are escalated
		2.2	Explain how to validate customers' identity
		2.3	Explain the techniques for establishing a rapport with customers
		2.4	Explain how to balance the needs of the organisation with those of customers when resolving customer service issues
		2.5	Explain the importance of informing customers of what is happening and the reasons for any constraints or limitations
3	Understand how to monitor customer service performance and compliance within a contact centre	3.1	Describe the scope of what needs to be monitored in customer service performance and compliance
		3.2	Explain the use of Key Performance Indicators in testing the quality of customer service delivery
		3.3	Describe how to validate monitoring data
		3.4	Explain how to analyse monitoring data to identify areas for enhancement
		3.5	Describe who needs to be informed of monitoring results and why
4	Understand how to communicate verbally and in written or electronic	4.1	Explain the need for procedures and guidelines for verbal and written communications

	form with customers referred by others in a contact centre	4.2	Explain how to adapt the use of language to meet customers' needs
		4.3	Explain the strengths and weaknesses of verbal and written communications
		4.4	Explain how to identify inadequacies in the standard of colleagues' communications with customers

# SFEDI<sup>®</sup>AWARDS

## Sales

The following units aim to support the development of those skills required to effectively plan and implement sales strategies to support the making and closing of deals with customers.

## H/503/3432 Principles of Marketing and Selling in a New Business

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 3

**Guided Learning** 24 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand how to identify and meet customer needs in a new business
- ✓ Understand how to market products or services in a new business
- ✓ Understand how to plan for selling products or services

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to identify and meet customer needs in a new business	1.1	Evaluate different methods of collecting information on customer needs in a new business
		1.2	Explain how information can be used to analyse customer needs
		1.3	Explain how competition might impact on ability to meet customer needs
		1.4	Explain how to set and review business targets to meet the needs of different customer target groups
2	Understand how to market products or services in a new business	2.1	Explain how to market products or services for a new business idea
		2.2	Explain why it is important to set goals for marketing and sales against business targets
		2.3	Explain how to develop criteria for monitoring marketing performance and success against targets
		2.4	Describe how to set and review marketing targets for a new business
3	Understand how to plan for selling products or services	3.1	Assess the advantages and disadvantages of different methods of selling products or services
		3.2	Explain the importance of setting sales targets for a new business
		3.3	Explain the key elements required in a sales plan
		3.4	Select an appropriate format for a sales plan



J/503/8865

Plan to Sell a Product or Service

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**Unit Status** Optional**Unit Level** 3**Credit Value** 2**Guided Learning** 16 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Assess the methods for selling business products or services
- ✓ Set sales targets for a business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

**Unit Content**

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to assess the methods for selling business products or services	1.1	Review the advantages and disadvantages of methods of selling products or services of own business
		1.2	Assess the impact of methods of selling on the volume of sales for own business
		1.3	Justify the choice of method of selling products or services for own business
2	Be able to set sales targets for a business	2.1	Calculate the level of sales of the products or services needed to break-even on a monthly basis for own business
		2.2	Set sales targets that take account of sales forecasts, profit margins and cash flow
		2.3	Justify the choice of timings by which to review progress against sales targets for own business
		2.4	Develop a sales plan for own business

T/508/3011

Contributing to the Development and Launch  
of New Products and/or Services

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	4
<b>Guided Learning</b>	26 hours

**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Understand the product development process
- ✓ Be able to contribute to the product and/or service development and launch process

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the product development process	1.1	Describe the sales forecasting technique used by the organisation
		1.2	Explain the market features and trends relating to products or services in the market
		1.3	Explain the customer base for the proposed product in terms of their wants and needs
2	Be able to contribute to the product and/or service development and launch process	2.1	Consult with colleagues and selected customers about a new product or service strategy
		2.2	Generate ideas and/or enhancements to others' ideas for new products or services that meet the development criteria
		2.3	Screen new ideas in accordance with the organisation's guidelines, marketing objectives
		2.4	Test the market for the proposed product and/or service in accordance with the development plan
		2.5	Provide information about existing customers, their needs, wants and behaviours in accordance with the market analysis specification
		2.6	Support the preparation of a business case for the launch of a new product and/or service in accordance with the development plan
		2.7	Forecast sales to support business case preparation in accordance with the development plan
		2.8	Prepare information for customers about the new product and/or service in accordance with the development plan
		2.9	Use feedback from stakeholders to refine the new product and/or service

H/508/3005

Pricing for Sales Promotions

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	5
<b>Guided Learning</b>	34 hours

**Unit Overview and Main Outcomes**

This unit contains 5 learning outcomes which will support the learner to be able to:

- ✓ Understand price-based promotions
- ✓ Be able to justify price-based promotions as part of a promotional strategy
- ✓ Be able to develop and present proposals for price-based promotions
- ✓ Understand how to evaluate price based promotions
- ✓ Be able to implement and evaluate price-based promotions

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand price-based promotions	1.1	Describe the strengths and weaknesses of different types of price-based promotions, including incentives and discounts
		1.2	Describe the different approaches used by competitors to respond to price changes and price-based promotions
		1.3	Explain how to identify and use sales opportunities resulting from a price-based promotion for higher volume and value sales
		1.4	Describe how to assess the organisational costs and benefits of price-based promotions
		1.5	Identify legal and ethical issues relating to price-based promotions
2	Be able to justify price-based promotions as part of a promotional strategy	2.1	Identify situations where a price-based promotion is justified to meet sales targets
		2.2	Calculate the affordability of a proposed price-based promotion and its effects on the achievement of sales volume and profitability targets
		2.3	Identify how to gain internal support or guidance on implementing price-based promotions
3	Be able to develop and present proposals for price-based promotions	3.1	Identify risks in a price-based promotion
		3.2	Identify contingencies appropriate to the risks identified
		3.3	Prepare proposals to justify price-based promotions in accordance with organisational procedures
		3.4	Present a proposal following organisational procedures
4	Understand how to evaluate price based promotions	4.1	Explain the importance of measuring the impact of price-based promotions on sales activities
		4.2	Explain the importance of evaluating the likely impact of price-based promotions on future sales activities
		4.3	Describe the methods and mechanisms for measuring the success of price-based promotions

		4.4	Describe how monitoring information is used to inform the design of future promotions
5	Be able to implement and evaluate price-based promotions	5.1	Implement price-based promotions within the scope of own authority
		5.2	Monitor customer and competitor reactions to a price-based promotion against agreed criteria
		5.3	Evaluate the impact of the promotion on market conditions against agreed criteria
		5.4	Identify how the outcomes of price-based promotions will be used to inform future promotions

R/508/3002

## Obtaining and Analysing Sales Related Information

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 24 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the uses of sales-related information
- ✓ Understand how to use tools and methods to analyse sales-related information
- ✓ Be able to obtain sales-related information about customers, markets and competitors
- ✓ Be able to use tools and methods to analyse sales-related information

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony



## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the uses of sales-related information	1.1	Explain the importance of up-to-date information for sales planning purposes
		1.2	Explain the benefits and risks of using a range of information sources to support sales activities
		1.3	Explain the limitations of sales-related information
		1.4	Explain the importance of reviewing sales data requirements for current and future use
2	Understand how to use tools and methods to analyse sales-related information	2.1	Explain the advantages and disadvantages of different systems to gather sales-related information
		2.2	Explain how to use different software packages for analysing and presenting sales-related information
3	Be able to obtain sales-related information about customers, markets and competitors	3.1	Specify the information needed to develop an understanding of customers, competitors and markets
		3.2	Identify sources that are capable of providing the required information about the organisation's markets, customers and competitors
		3.3	Collate sales-related information using planned systems and taking ad hoc opportunities to gather information, in a way that enables data manipulation, analysis and interpretation
4	Be able to use tools and methods to analyse sales-related information	4.1	Select analytical tools and methods that are capable of providing the required degree of analysis of sales-related information
		4.2	Define the information needs of the target audience for different types of sales-related information
		4.3	Use the analytical protocols that are appropriate to the selected tools and methods
		4.4	Identify issues, trends, themes, linkages and interdependencies from an analysis of sales-related information
		4.5	Validate the reliability and validity of the findings of the analysis

		4.6	Provide sales-related information to the target audience within the agreed timescale and budget
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Y/508/3003

## Obtaining and Analysing Competitor Information

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 3

**Guided Learning** 18 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand how to validate information about competitors
- ✓ Understand the uses of competitor information for sales-related activities
- ✓ Be able to use competitor information for sales-related activities

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to validate information about competitors	1.1	Explain how and where to source information about competitors
		1.2	Explain how to validate sourced information about competitors against recognised criteria
		1.3	Describe the advantages and disadvantages of qualitative and quantitative methods for collecting competitor information
2	Understand the uses of competitor information for sales-related activities	2.1	Explain the purpose of obtaining and analysing information about competitors
		2.2	Explain organisational policy on the recording of competitor information
		2.3	Identify criteria that can be used to compare organisations with their competitors
		2.4	Explain how to assess the impact of competitor activity on organisations
3	Be able to use competitor information for sales-related activities	3.1	Obtain and record information about competitors in ways that allow analysis to be undertaken
		3.2	Identify competitors' objectives
		3.3	Identify the nature of potentially threatening competitor activity
		3.4	Estimate the relative importance of competitor activity on profitability and market share growth
		3.5	Review the impact of competitor activity on sales activities
		3.6	Propose sales activities in response to competitors' activities

D/508/3004

Buyer Behaviour in Sales Situations

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**Unit Status** Optional**Unit Level** 3**Credit Value** 3**Guided Learning** 27 hours**Unit Overview and Main Outcomes**

This unit contains 2 learning outcomes which will support the learner to be able to:

- ✓ Understand the impact of different models of buyer behaviour on the sales cycle
- ✓ Be able to respond to the buyer at each stage of the decision making process

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the impact of different models of buyer behaviour on the sales cycle	1.1	Explain the consumer buying decision-making process
		1.2	Explain how the consumer buying decision-making process affects the sales cycle
		1.3	Describe the influences that affect the consumer decision-making process
		1.4	Explain the organisational buying decision-making process
		1.5	Explain how the organisational buying decision-making process affects the sales cycle
		1.6	Describe the influences that affect the organisational buying decision-making process
		1.7	Explain the impact of the different roles within the decision-making unit on the sales cycle
2	Be able to respond to the buyer at each stage of the decision making process	2.1	Use the methods for contacting customers, influencers and decision-makers appropriate to different stages of the buying decision-making process
		2.2	Respond to different decision-makers in a sales situation in a way that is appropriate to their role
		2.3	Use objections as buying opportunities
		2.4	Confirm solution(s) offered meet the needs and wants of decision-makers

A/508/3012

Prioritising Information for Sales Planning

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	4
<b>Credit Value</b>	3
<b>Guided Learning</b>	20 hours

**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand sources and types of information that support sales
- ✓ Understand internal information that supports sales
- ✓ Be able to carry out a business audit of the internal and external sales environment
- ✓ Be able to use sales information to support the sales planning function

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - 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	4.1	Monitor trends and developments that impact on business and sales activities against agreed criteria
		4.2	Identify market developments and their implications for organisational sales plans
		4.3	Ensure that sales information is communicated to those who need it in accordance with organisational procedures



J/508/3014

Developing Sales Proposals

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**Unit Status** Optional**Unit Level** 4**Credit Value** 5**Guided Learning** 30 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand how to write sales proposals
- ✓ Be able to develop sales proposals
- ✓ Be able to evaluate the proposal

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - 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
3	Be able to evaluate the proposal	2.9	Supply the proposal within the agreed timescale
		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
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K/508/3006

Preparing and Delivering a Sales Presentation

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**Unit Status** Optional**Unit Level** 3**Credit Value** 4**Guided Learning** 28 hours**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the factors for consideration in the preparation of sales presentations
- ✓ Be able to prepare a sales presentation
- ✓ Understand how to deliver sales presentations
- ✓ Be able to deliver a sales presentation

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the factors for consideration in the preparation of sales presentations	1.1	Explain the importance of presentations to the achievement of sales targets
		1.2	Explain the difference between formal and informal presentations
		1.3	Explain the importance of setting aims and objectives when preparing a presentation
		1.4	Describe how customer characteristics and buying behaviours will influence a presentation
		1.5	Identify who to go to for support relating to the presentation
		1.6	Explain the legal, social and ethical constraints that need to be considered when designing and delivering sales presentations
2	Be able to prepare a sales presentation	2.1	Describe the needs of the customer or audience
		2.2	Set objectives for the sales presentation ensuring they reflect the customers' or audience's needs and interests
		2.3	Assess the suitability of the venue for the presentation, and review issues relating to its size, acoustics and layout
		2.4	Identify and prepare resources for delivery of the presentation
		2.5	Obtain promotional material that will enhance the presentation
		2.6	Include the product/service benefits and/or unique selling propositions in the presentation
		2.7	Structure the presentation in line with its objectives
		2.8	Ensure the presentation complements any proposal already supplied to the customer
		2.9	Ensure the presentation can be delivered within the agreed timescale
3	Understand how to deliver sales presentations	3.1	Describe how to use verbal and non-verbal communications in presentations
		3.2	Explain the importance of rehearsing a presentation
		3.3	Describe techniques to capture and retain the audience's attention

		3.4	Describe the organisational methods for reporting and recording the outcome of presentations
4	Be able to deliver a sales presentation	4.1	Use pitch, tone and pace of delivery to engage the audience
		4.2	Deliver a presentation that captures and retains the audience's attention
		4.3	Use visual aids and/or publicity materials to support the presentation
		4.4	Provide the audience with opportunities to ask questions and raise objections
		4.5	Respond to questions, concerns and objections from the customer or audience in a way that gives a positive image of the organisation and its products and/or services
		4.6	Gain commitment to proceed with the sale
		4.7	Evaluate the effectiveness of the presentation in the light of stakeholder feedback and subsequent sales related activities and outcomes

L/508/3015

Building and Retaining Sales Relationships

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**Unit Status** Optional**Unit Level** 4**Credit Value** 5**Guided Learning** 34 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the benefits and risks of planning and investing in sales relationships
- ✓ Be able to build sales relationships
- ✓ Be able to retain sales customers

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the benefits and risks of planning and investing in sales relationships	1.1	Explain the criteria by which to evaluate and prioritise customers with whom the organisation should build sales relationships
		1.2	Explain the long term value that customers can bring to the organisation through developing sales relationships with them
		1.3	Describe how to identify risks involved in relationships with customers
		1.4	Describe how to identify risks involved in relationships with customers
		1.5	Explain methods of monitoring and evaluating customer relationships
2	Be able to build sales relationships	2.1	Prioritise customers with whom to build sales relationships
		2.2	Balance existing and potential customer needs and expectations with those of the organisation's sales strategy
		2.3	Develop a customer relationship plan which takes into account the organisation's resource requirements
		2.4	Offer products and/or services in terms of customer needs and expectations
		2.5	Negotiate sales solution(s) with the customer that are mutually beneficial
		2.6	Identify further opportunities to develop the relationship with the customer
3	Be able to retain sales customers	3.1	Collate customer feedback about the organisation's provision of products and/or services in accordance with organisational procedures
		3.2	Ensure that the quality and consistency of products and/or services is being maintained



		3.3	Manage customer complaints or problems and provide sales solutions in accordance with organisational procedures and standards
		3.4	Ensure feedback is given to colleagues on the status of the sales relationship
		3.5	Monitor and evaluate the sales relationship in accordance with organisational procedures

A/508/3009

Assessing Customers' Credit Status

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**Unit Status** Optional**Unit Level** 3**Credit Value** 4**Guided Learning** 26 hours**Unit Overview and Main Outcomes**

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand how to assess customer credit status
- ✓ Be able to assess the credit status of customers
- ✓ Be able to monitor the credit status of customers

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to assess customer credit status	1.1	Explain the purpose of assessing customers' credit status
		1.2	Describe a range of internal and external checks that may be used to assess customer credit status
		1.3	Explain how liquidity ratios are calculated and are used to assess customer credit status
		1.4	Explain the importance of following organisational procedures when carrying out a credit status assessment
2	Be able to assess the credit status of customers	2.1	Identify the customers' requirements for sales and credit
		2.2	Explain to the customer the process the organisation will use for approving credit and setting a credit limit
		2.3	Gather sufficient financial information from the customer to support credit searches
		2.4	Ensure the customer is financially secure by analysing their liquidity ratios
		2.5	Confirm the creditworthiness of customers by conducting checks through banks, credit rating agencies or supplier references and internal colleagues
		2.6	Complete a formal agreement with the customer in line with the organisational procedures if the credit searches have proved satisfactory
		2.7	Explain to the customer if the credit searches have proved negative and offer cash trading only
3	Be able to monitor the credit status of customers	3.1	Monitor the customer's account regularly following the organisation's procedures
		3.2	Liaise with the customer regarding any changes in credit limits and the status of their account in accordance with organisational procedures

T/508/3008

## Assisting Customers in Obtaining Finance for Purchases

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 2

**Guided Learning** 11 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the conditions for obtaining finance for purchases
- ✓ Be able to propose financial options to customers
- ✓ Be able to complete finance arrangements for purchases

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the conditions for obtaining finance for purchases	1.1	Identify the advantages and disadvantages of different methods used for raising finance for purchases
		1.2	Identify the organisation's preferred supplier of financial packages
		1.3	Identify the additional financial services which are appropriate to sell to customers
		1.4	Explain the types of terms and conditions that apply to different financial packages
		1.5	Describe the levels of authority of those involved in assisting customers to obtain finance for purchases
		1.6	Explain the organisation's legal procedures for completion of finance documentation
2	Be able to propose financial options to customers	2.1	Determine the customer's need for finance, the amount of borrowing required and any special requirements or constraints
		2.2	Agree the preferred financial option with the customer
		2.3	Gather sufficient information to enable the application for finance to proceed
		2.4	Resolve shortfalls and inconsistencies in information supplied by the customer
		2.5	Provide the customer with opportunities to ask questions and raise concerns
3	Be able to complete finance arrangements for purchases	3.1	Inform the customer of the terms and conditions of the financial arrangements
		3.2	Provide written proposals for a finance agreement to the customer
		3.3	Ensure all documentation is completed in compliance with legal and regulatory requirements

## Y/508/2997      Negotiating, Handling Objections and Closing Sales

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**Unit Status**                      Optional

**Unit Level**                      3

**Credit Value**                      4

**Guided Learning**                      22 hours

### **Unit Overview and Main Outcomes**

This unit contains 5 learning outcomes which will support the learner to be able to:

- ✓ Understand how to handle objections and negotiate with the customer
- ✓ Be able to prepare for objections and negotiation with the customer
- ✓ Be able to handle objections
- ✓ Be able to negotiate with the customer
- ✓ Be able to close the sale following negotiation

### **Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to handle objections and negotiate with the customer	1.1	Describe the scope of authority and responsibility when dealing with objections
		1.2	Identify the resources available to counter the sales objections
		1.3	Describe how to plan and prepare for negotiation
		1.4	Describe how to use testimonials to progress a sale
		1.5	Explain the advantages and disadvantages of different methods of closing a sale
		1.6	Explain organisational procedures for documenting the negotiated sale
2	Be able to prepare for objections and negotiation with the customer	2.1	Identify possible sales objections and appropriate responses prior to dealing with the customer
		2.2	Confirm authorisation to negotiate
		2.3	Prepare a negotiation plan that is capable of providing a mutually acceptable outcome
3	Be able to handle objections	3.1	Identify customer needs and wants in relation to objections by using a variety of questioning techniques
		3.2	Identify and prioritise customers' concerns
		3.3	Provide evidence to the customer of the strengths of the organisation's products or services
		3.4	Confirm with the customer that the objection(s) have been overcome
		3.5	Identify and respond to verbal and non-verbal buying signals in a way that is consistent with the nature of the signals
4	Be able to negotiate with the customer	4.1	Carry out negotiations according to negotiation plan
		4.2	Promote the benefits of what is being offered to the customer
		4.3	Explain to the customer when and why no further adjustment is possible
		4.4	Obtain support to progress negotiation that is outside own level of authority
5	Be able to close the sale following negotiation	5.1	Apply a trial close in accordance with the negotiation plan

		5.2	Respond to any further objections and concerns
		5.3	Identify and make use of potential add-on, up-selling or cross-selling opportunities
		5.4	Summarise agreements made in accordance with organisational procedures and close the sale



R/508/3016

## Developing and Implementing Sales Support and Customer Service Programmes

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	4
<b>Credit Value</b>	5
<b>Guided Learning</b>	35 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand the requirement to provide sales support and customer service programmes
- ✓ Be able to develop sales support and/or customer service programmes
- ✓ Be able to implement sales support and customer service programmes

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the requirement to provide sales support and customer service programmes	1.1	Explain the advantages and disadvantages of customer care programmes, customer support and customer service programmes
		1.2	Explain how customer care programmes, customer support and customer service programmes add value for customers and the organisation
		1.3	Describe how service standards are developed and used to manage performance in customer service
		1.4	Explain quality assurance models that help to manage customer service quality
		1.5	Explain how to ensure that the level of service provided continues to meet customer expectations
2	Be able to develop sales support and/or customer service programmes	2.1	Plan a sales support and customer service programme in accordance with the sales strategy
		2.2	Evaluate the effectiveness of existing processes for managing and providing service to customers against agreed criteria
		2.3	Develop a sales support or customer service programme, or recommend improvements to existing processes that meet the agreed criteria
		2.4	Establish resource requirements directly related to the sales area to deliver sales support and customer management to the agreed standard
3	Be able to implement sales support and customer service programmes	3.1	Identify appropriate ICT support for effective communication with customers
		3.2	Adapt to changing circumstances in implementing sales support and customer service programmes in accordance with the plan

		3.3	Record customer management information in accordance with organisational procedures
		3.4	Keep those concerned with sales support and customer service up to date with customer management information
		3.5	Ensure ongoing compliance with quality initiatives, processes and procedures and service level agreements as agreed between the customer and the organisation
		3.6	Take prompt action in the event of shortfalls in service standards in accordance with the sales strategy

M/508/3010

## Communicating Using Digital Marketing/Sales Channels

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<b>Unit Status</b>	Optional
<b>Unit Level</b>	3
<b>Credit Value</b>	4
<b>Guided Learning</b>	26 hours

**Unit Overview and Main Outcomes**

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand how to plan the use of digital media for a specific message, audience and recipients
- ✓ Be able to plan the use of digital media for a specific message, audience and recipients
- ✓ Be able to check the digital message can be accessed and/or delivered
- ✓ Be able to monitor and evaluate the response to digital activity and take any corrective action

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to plan the use of digital media for a specific message, audience and recipients	1.1	Explain the selection of the organisation's targeted customers
		1.2	Describe expected target audience responses to different electronic media communication methods
		1.3	Describe the characteristics, advantages and disadvantages of different software packages for presenting marketing information
		1.4	Explain the requirements of using multiple digital marketing technologies
2	Be able to plan the use of digital media for a specific message, audience and recipients	2.1	Confirm the sales and marketing objectives for the digital communication, including response rates and sales generated return on investment
		2.2	Identify the criteria to be used in selecting recipients in target audience
		2.3	Source and acquire targeted lists and databases of recipients in accordance with the plan
		2.4	Confirm the range of electronic media best suited to communicating to the target audience in line with the sales and marketing objectives
		2.5	Agree with relevant people the marketing communications message designed to engage the customer and which is appropriate for the media selected
3	Be able to check the digital message can be accessed and/or delivered	3.1	Check any links, keywords, and supporting attachments allow access by recipients to further information
		3.2	Identify any risks that the message might be labelled as 'spam' and take action to minimise such risks
		3.3	Enable click-through tracking in digital messages in accordance with the plan
		3.4	Send messages to targeted customers in accordance with the plan
		3.5	Set up reporting system for 'undeliverables' in accordance with organisational procedures

4	Be able to monitor and evaluate the response to digital activity and take any corrective action	4.1	Record undelivered messages in accordance with reporting system
		4.2	Identify repeat communications requirements in line with the sales and marketing objectives
		4.3	Monitor and evaluate the responses to digital marketing against agreed criteria
		4.4	Report the findings of the evaluation in accordance with organisational procedures

Y/615/4842

## Principles and Processes of Systems and Technology in a Contact Centre

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 26 hours

### Unit Overview and Main Outcomes

This unit contains 3 learning outcomes which will support the learner to be able to:

- ✓ Understand how to design reports in a contact centre
- ✓ Understand how to optimise performance in a contact centre through systems and technology
- ✓ Understand the use of contact centre systems and technology

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how to design reports in a contact centre	1.1	Explain how to identify metrics to be included in reports
		1.2	Explain what needs to be included in reports
		1.3	Describe standards and guidelines for the presentation of reports
2	Understand how to optimise performance in a contact centre through systems and technology	2.1	Explain how coaching/buddying activities improve colleagues' use of systems and technology
		2.2	Explain the effects of alterations to applications and systems
		2.3	Explain how routing rules can be adjusted to meet changing priorities and resources
		2.4	Explain how to identify data flow changes and why this is important
3	Understand the use of contact centre systems and technology	3.1	Describe how systems and technology address changes resulting from legislation and regulation
		3.2	Explain parameters for system configuration
		3.3	Explain the importance of predicative contact queuing to efficient operations



D/615/4843

## Principles of Sales Activities and Customer Support in a Contact Centre

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 4

**Guided Learning** 24 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Understand the process of selling in a contact centre
- ✓ Understand the use of contact centre sales data
- ✓ Understand how to lead a sales team in a contact centre
- ✓ Understand customer complaints and non-compliance issues in a contact centre

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand the process of selling in a contact centre	1.1	Explain the information needed to prepare for sales activities
		1.2	Describe the purpose of explaining to customers the features and benefits of products and/or services offered or supported
		1.3	Describe the impact of legislation on selling
		1.4	Explain how to offer options to customers by linking wishes and needs to products and/or services
		1.5	Explain techniques to adapt sales styles to mirror customers' behaviours
		1.6	Explain techniques for overcoming customers' objections and questions
		1.7	Explain techniques for closing the sale
		1.8	Explain techniques for up-selling and cross-selling
		1.9	Describe procedures for authorisation of payment and recording customers' orders
2	Understand the use of contact centre sales data	2.1	Explain how sales data should be collated to enable data manipulation
		2.2	Describe current market and customer trends
		2.3	Explain analysis techniques to compare performance against benchmarks
		2.4	Explain how the results will be used to inform sales plans
3	Understand how to lead a sales team in a contact centre	3.1	Explain how to identify sales activities that are capable of fulfilling a sales plan
		3.2	Explain how to set stretching but realistic and achievable targets
		3.3	Explain how to monitor team performance towards targets

		3.4	Explain how to identify opportunities for improving sales performance
		3.5	Explain how advice and support for colleagues increases their understanding of sales related requirements
		3.6	Explain the importance of setting a good examples and encouraging colleagues
4	Understand customer complaints and non-compliance issues in a contact centre	4.1	Describe the stages for dealing with customer complaints
		4.2	Explain what constitutes non-compliance with legal and regulatory requirements
		4.3	Explain the implications of non-compliance with legal and regulatory requirements
		4.4	Explain the importance of complying with breaches of service offers and the impact of non-compliance
		4.5	Explain the impact of non-compliance with a service offer

## J/503/9322 Principles of Social Media Advertising and Promotion

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 6

**Guided Learning** 34 hours

### Unit Overview and Main Outcomes

This unit contains 4 learning outcomes which will support the learner to be able to:

- ✓ Be able to plan how to use digital vouchers for marketing purposes
- ✓ Be able to plan the implementation of Social Networking site advertising campaigns for Marketing purposes
- ✓ Understand the use of promotional campaigns on social networking sites
- ✓ Understand current national and international legal and organisational guidelines for a social networking advertising/promotional campaign

### Assessment and Grading of This Unit

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to plan how to use digital vouchers for marketing purposes	1.1	Define the term digital vouchers
		1.2	Explain the potential uses of digital vouchers
		1.3	Research the current disadvantages of digital vouchers
		1.4	Explain how to overcome the barriers of using digital vouchers for acquisition and retention of customers
		1.5	Plan a SMART digital voucher campaign for a business
		1.6	Explain methods of managing a digital voucher system
		1.7	Explain how to measure the effectiveness of a digital voucher campaign
2	Be able to plan the implementation of Social Networking site advertising campaigns for Marketing purposes	2.1	Explain the factors to consider when creating Social Networking site adverts
		2.2	Justify the use of Social Networking site advertising campaigns
		2.3	Explain the importance of identifying the required outcomes from the Social Networking advertising campaigns
		2.4	Explain the advantages of creating more than one advertising campaign running in parallel on the same social networking site
		2.5	Explain why a Social Networking advertising campaign might fail
		2.6	Plan parallel Social Networking site advertising campaigns for a business
		2.7	Explain methods of monitoring Social Networking site advertising campaigns
		2.8	Identify changes that might be required for a Social Networking advertising campaign based on monitoring results
3	Understand the use of promotional campaigns on social networking sites	3.1	Define promotional campaigns on social networking sites
		3.2	Compare different types of promotional campaigns on social networking sites
		3.3	Explain why to use promotional campaigns on social networking sites
		3.4	Explain the limitations imposed by social networking sites on promotional campaigns
		3.5	Explain how to comply with restrictions on promotional campaigns on social networking sites

		3.6	Explain the factors which could cause negative PR when running a promotional campaign
4	Understand current national and international legal and organisational guidelines for a social networking advertising/promotional campaign	4.1	Explain the current national and international legal and organisational guidelines relating to the use of social networking site adverts
		4.2	Explain the importance of following current national and international legal and organisational guidelines for a social networking advertising/promotional campaign

**R/503/9324 Principles of Social Media within a Business**

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**Unit Status** Optional

**Unit Level** 3

**Credit Value** 6

**Guided Learning** 42 hours

**Unit Overview and Main Outcomes**

This unit contains 5 learning outcomes which will support the learner to be able to:

- ✓ Understand how Social Media fits into the objectives and marketing of a business
- ✓ Understand how to select Social Media tools and channels for a business
- ✓ Understand how to measure the success of using social media tools and channels
- ✓ Understand how social media policy and guidelines can impact a business
- ✓ Be able to monitor how a business is using Social Media

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Understand how Social Media fits into the objectives and marketing of a business	1.1	Describe a business and its type, vision, aims, objectives and goals
		1.2	Identify the brand and values of a business and how these are portrayed to the audience of a business
		1.3	Describe the marketing tools available to a business
		1.4	Explain the consequences of using Social Media on the budget of different sizes and types of business
		1.5	Explain the benefits and consequences of encouraging amplification
		1.6	Explain the benefits and consequences of encouraging engagement
		1.7	Explain the factors to consider when identifying a Social Media plan for a business
		1.8	Explain how Social Media could fit into the marketing plan of a business
2	Understand how to select Social Media tools and channels for a business	2.1	Describe the different tools and channels that can be used for Social Media
		2.2	Describe the features and benefits of the different tools and channels that can be used for Social Media
		2.3	Identify the potential type of audience for each different tool and channel that can be used for Social Media
		2.4	Explain the factors to consider when selecting different tools and channels for Social Media
		2.5	Evaluate different tools and channels for Social Media for business use
3	Understand how to measure the success of using social media tools and channels	3.1	Explain the importance of measuring the outcomes of using different Social Media tools and channels
		3.2	Explain why SMARTER targets should be set for different Social Media tools and channels
		3.3	Describe the methods a business can use to measure and identify success of different Social Media tools and channels
		3.4	Describe what success could look like when using different Social Media tools and channels for different types and sizes of business



4	Understand how social media policy and guidelines can impact a business	4.1	Describe the components of a business's social media policy and guidelines
		4.2	Explain the importance of having a social media policy and guidelines
		4.3	Explain the importance of having a reputation management policy
		4.4	Describe the benefits of managing perception changes in a business's reputation
		4.5	Describe how to manage perception changes in a business's reputation
5	Be able to monitor how a business is using Social Media	5.1	Explain the importance of knowing how similar businesses or industries are using Social Media
		5.2	Explain how to monitor the ways similar businesses or industries are using Social Media
		5.3	Monitor how a business is using Social Media
		5.4	Identify improvements to a business's use of Social Media

**Y/503/9325      Social Networking Management for a Business**

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**Unit Status**              Optional

**Unit Level**                3

**Credit Value**            7

**Guided Learning**       38 hours

**Unit Overview and Main Outcomes**

This unit contains 5 learning outcomes which will support the learner to be able to:

- ✓ Be able to evaluate external social networking tools for a business
- ✓ Understand how to classify the social networking audience of a business
- ✓ Be able to use social media management tools in relation to social networking
- ✓ Be able to carry out a risk analysis and create a digital crisis management plan in relation to social networking for a business
- ✓ Be able to use social networking measurement and monitoring tools for a business

**Assessment and Grading of This Unit**

This unit is graded on a pass or fail basis and the learner must demonstrate evidence against all of the listed assessment criteria in order to achieve this unit.

The following provides examples of assessment methods that could be used to generate evidence for this unit. This list is not an exhaustive list and other methods can be used by the centre.

- ✓ Product evidence
- ✓ Learner statement/case study
- ✓ Pre-approved worksheets
- ✓ Professional discussion
- ✓ Recognition of prior achievement
- ✓ Recognition of prior learning
- ✓ Witness testimony

## Unit Content

Learning Outcome - The learner will:		Assessment Criterion - The learner can:	
1	Be able to evaluate external social networking tools for a business	1.1	Define social networking
		1.2	Identify current external social networking tools for the geographical location of a business
		1.3	Compare the functionality and features of different external social networking tools
		1.4	Describe the limitations of different external social networking tools
		1.5	Select external social networking tools for a business
		1.6	Justify the selection of social networking tools for a business
2	Understand how to classify the social networking audience of a business	2.1	Explain the potential uses of grouping people in social networking tools
		2.2	Identify the audience groups for social networking for a business
		2.3	Explain the importance of evaluating the need for brand ambassadors in social networking for a business
		2.4	Explain how to recognise brand ambassadors
		2.5	Explain how to ensure the validity and credibility of brand ambassadors
		2.6	Explain how to manage brand ambassadors
		2.7	Explain the importance of evaluating the need for influencers in social networking for a business
		2.8	Explain how to recognise influencers
		2.9	Explain how to ensure the validity and credibility of influencers
		2.10	Explain how to manage influencers
3	Be able to use social media management tools in relation to social networking	3.1	Define the term 'social media management tool'
		3.2	Explain the importance of using social media management tools in relation to social networking
		3.3	Explain the disadvantages of using social media management tools
		3.4	Use a social media management tool to group an audience relevant to a business
		3.5	Use a social media management tool to schedule content relevant to a business

		3.6	Use a social media management tool to share content relevant to a business
		3.7	Explain the benefits of using short-URLs within content
		3.8	Use a social media management tool to listen to content relevant to a business
		3.9	Use a social media tool to have ongoing dialogue with an audience relevant to a business
4	Be able to carry out a risk analysis and create a digital crisis management plan in relation to social networking for a business	4.1	Compare risk analysis and digital crisis management
		4.2	Explain the importance of monitoring for risk
		4.3	Carry out a risk analysis in relation to social networking for a business
		4.4	Create a digital crisis management plan in relation social networking for a business
5	Be able to use social networking measurement and monitoring tools for a business	5.1	Define the term social networking measurement and monitoring
		5.2	Identify social networking measurement and monitoring
		5.3	Explain the potential uses of social networking measurement and monitoring tools
		5.4	Explain the limitations of social networking measurement and monitoring tools
		5.5	Measure the amount of engagement and amplification on social networking for a business
		5.6	Analyse changes in sentiment to social networking for a business
		5.7	Recommend improvements to social networking for a business

## Annex

The following pages provide documentation supplied for your use in the delivery of this qualification. We do not mandate the use of this documentation but if you choose to not make use of it then it is expected that you have the necessary documentation in place which meets the minimum requirements in order to allow delivery to take place in an effective and efficient manner.

## Learner Registration Form

<b>Full Name (as will appear on certificate)</b>		
<b>Title (delete as appropriate)</b>	Mr/Mrs/Miss/Ms/Dr/Prof	
<b>Home Address</b>		
<b>Telephone Number</b>		
<b>Email Address</b>		
<b>Unique Learner Number (centre to source and enter this information)</b>		
<b>Qualification/Unit Title</b>		

  

<b>Date of Birth</b>		
<b>Gender (delete as appropriate)</b>	Male/Female	
<b>Disability (delete as appropriate)</b>	Yes/No/Not Stated	
<b>Ethnicity (tick as appropriate)</b>	Asian Bangladeshi	
	Asian Indian	
	Asian Pakistani	
	Any Other Asian Background	
	White and Black Caribbean	
	White and Black African	
	Asian and White	
	Any Other Mixed Background	
	Black African	
	Black Caribbean	
	Any Other Black Background	
	White British	
	White English	
	White Irish	
	White Scottish	
	White Welsh	
	Any Other White Background	
	Chinese	
	Other	

## Assessment Plan

<b>Learner Name</b>	
<b>Assessor Name</b>	
<b>Qualification/Unit Title(s)</b>	
<b>Date of Plan</b>	
<b>Next Review Date</b>	

**Feedback on previous planned tasks (to be used to explain the tasks that have been completed, how well the learner has performed and how much of the qualification has been achieved to date)**

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<b>Unit Reference Number</b>	<b>Description of task to be completed including any preparation requirements</b>	<b>Target Date</b>
Naturally occurring evidence may be used as appropriate but this will not be the main form of evidence generation		

<b>Learner Signature</b>		<b>Date:</b>
<b>Assessor Signature</b>		<b>Date:</b>
<b>IQA Signature (if sampled)</b>		<b>Date:</b>

Assessment Report

Learner Name	
Assessor Name	
Date of Assessment	
Evidence Reference Number	

Tick one or more options below to indicate the method of assessment used

Professional Discussion		Observation		Questioning		Product Evidence	
Other (please specify)							

Use the space below to provide a full account of the assessment carried out	Criteria covered by assessment



Use the space below to provide a full account of the assessment carried out	Criteria covered by assessment

Use this space to provide feedback to the learner:

Learner Signature		Date:
Assessor Signature		Date:
IQA Signature (if sampled)		Date:

Witness Testimony Report

Learner Name	
Assessor Name	
Witness Name	
Relationship to Learner	
Date of Witness Testimony	
Evidence Reference Number	

Use the space below to provide a full account of the witness testimony provided	Criteria covered by assessment

Use the space below to provide a full account of the witness testimony provided	Criteria covered by assessment

<p>Use this space to provide feedback to the learner:</p>
---

Learner Signature		Date:
Assessor Signature		Date:
Witness Signature		Date:
IQA Signature (if sampled)		Date:

## Evidence Matrix Record

<b>Learner Name</b>		<b>Assessor Name</b>	
<b>IQA Name</b>		<b>Unit Number</b>	

Description of evidence (eg. CV, observation)	Evidence Reference Number	Assessment Criteria (enter the assessment criteria reference numbers below and tick in the corresponding column where the evidence referenced meets the requirement)													

Description of evidence (eg. CV, observation)	Evidence Reference Number	Assessment Criteria (enter the assessment criteria reference numbers below and tick in the corresponding column where the evidence referenced meets the requirement)													

I confirm that the evidence above meets the requirements of the unit in full and is the work of the learner. The evidence is also authentic, sufficient, valid and current to the standards required and the unit is now ready to be signed off as complete.

<b>Learner Signature</b>		<b>Date</b>	
<b>Assessor Signature</b>		<b>Date</b>	
<b>IQA Signature (if sampled)</b>		<b>Date</b>	

## Summative Statement

<b>Learner Name</b>	
<b>Qualification/Unit Title</b>	

## Learner Statement

I confirm that all of the evidence presented in relation to the above qualification/unit has been produced by myself and meets the requirement of being authentic, sufficient, valid and current to the standards required.

<b>Learner Signature</b>		<b>Date:</b>
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## Assessor Statement

I confirm that I have assessed all of the work produced and have ensured that the work is that of the above learner. I have ensured that during the learning process the evidence is authentic, sufficient, valid and current to the standards required.

<b>Assessor Signature</b>		<b>Date:</b>
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<b>IQA Signature (if sampled)</b>		<b>Date:</b>
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## Internal Quality Assurance Sampling Report

<b>Learner Name</b>	
<b>Assessor Name</b>	
<b>Qualification/Unit Title(s)</b>	
<b>Date of Sample</b>	
<b>Next Sample Date (if applicable)</b>	

<b>Type of sampling activity completed (tick at least one option on each of the first two rows):</b>					
<b>Interim sampling</b>		<b>Summative sampling (certification can be claimed)</b>		<b>Summative sampling (folder referred for actions)</b>	
<b>Folder check</b>		<b>Observation of delivery (observation report attached)</b>		<b>Learner interview (interview record attached)</b>	
<b>Other (please detail):</b>					

<b>Assurance of the assessment process (tick at least one option for each question):</b>	<b>Yes</b>	<b>No</b>
Has an initial assessment taken place?		
Has an assessment/development plan been agreed with the learner?		
Is the Assessor recording assessment outcomes after each assessment has taken place and providing the learner with feedback?		
Has the Assessor confirmed authenticity, sufficiency, accuracy, consistency and validity whilst assessing the evidence?		
Are the learner's assessment/development records being updated and completed on an ongoing basis?		

<b>Action points/feedback to the Assessor:</b>
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<b>Assessor Signature</b>		<b>Date:</b>
<b>IQA Signature</b>		<b>Date:</b>

<b>Actions complete (folder not ready for certification)</b>		<b>Actions complete (folder can be claimed for certification)</b>	
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<b>Assessor Signature</b>		<b>Date:</b>
<b>IQA Signature</b>		<b>Date:</b>

## Learner Interview Record

<b>Learner Name</b>	
<b>Assessor Name</b>	
<b>Qualification/Unit Title</b>	
<b>Date of Interview</b>	

<b>Interview Questions:</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
Did the Assessor explain the requirements of the programme and assessment methods at induction?			
Did the Assessor explain the appeals, the complaints and the whistleblowing procedures?			
Did the Assessor explain the quality assurance process and the part that the IQA, Awarding Organisation and Regulator play within this?			
Did anyone find out about any training you needed and organise for this to take place?			
Did the Assessor agree an assessment plan so that you understood what is required, by when and why in order to achieve the qualification?			
Did the Assessor consider your prior learning and experience in the development of the assessment plan?			
Did the Assessor review and update assessment plans to provide clear structure and guidance to you for the completion of the qualification?			
Do you feel you have received the required support to complete the required assessments?			
Do you feel you can discuss disagreements with assessment decisions with the Assessor?			
Do you feel the qualification will help you in the future?			
Have you been provided with advice and guidance on what you could progress to after the completion of this qualification?			

**Any other comments:**

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<b>Learner Signature</b>		<b>Date:</b>
<b>IQA Signature</b>		<b>Date:</b>



# SFEDI<sup>®</sup>AWARDS

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