

**all you need
to know.**

Qualification Specification

NCFE Level 3 Diploma in Business
Administration (601/3965/1)

Issue 5.1 June 2020

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Summary of changes

This section summarises the changes to this qualification specification since the last version (Issue 5 June 2018). Please check the qualification page on our website for the most recent version.

- Information regarding the [wellbeing and safeguarding](#) of learners added to Section 1 (page 17).

Section 1

Qualification overview

Section 1

Qualification overview

Introduction

We want to make your experience of working with NCFE as pleasant and easy as possible. This qualification specification contains everything you need to know about this qualification and should be used by everyone involved in the planning, delivery and assessment of the NCFE Level 3 Diploma in Business Administration.

All information contained in this specification is correct at the time of publishing.

To ensure that you are using the most up-to-date version of this qualification specification please check the issue date in the page headers against that of the qualification specification on our website www.ncfe.org.uk.

If you advertise this qualification using a different or shortened name you must ensure that learners are aware that their final certificate will state the regulated qualification title of NCFE Level 3 Diploma in Business Administration.

The NCFE Level 3 Diploma in Business Administration is a competence-based qualification.

A competence-based qualification is based on National Occupational Standards (NOS) and is a job-ready qualification which requires learners to demonstrate the skills and knowledge required to work in a specific industry. A competence-based qualification must be assessed in the workplace or in a realistic work environment (RWE) in accordance with the relevant assessment strategy. For further information on the strategy please visit the qualifications page on our website www.ncfe.org.uk.

About this qualification

This is a regulated qualification. The regulated number for this qualification is 601/3965/1.

This is a cross sector qualification aimed at current and prospective business administrators. This qualification covers the skills and knowledge needed to be successful at a managerial level, and covers competencies applicable to a wide range of contexts.

This qualification may be eligible for funding. For further guidance on funding, please contact your local funding provider.

Things you need to know

- Qualification number (QN): 601/3965/1
- Aim reference: 60139651
- Total Qualification Time (TQT): 580
- Guided learning hours (GLH): 282
- Credit value: 58
- Level: 3
- Assessment requirements: internally assessed and externally moderated portfolio of evidence

Total Qualification Time (TQT)

Total Qualification Time is the number of notional hours which represents an estimate of the total amount of time that could reasonably be expected to be required in order for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

Total Qualification Time comprises:

- the Guided Learning Hours for the qualification
- an estimate of the number of hours a learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the immediate guidance or supervision of – a lecturer, supervisor, Tutor or other appropriate provider of education or training.

Aims and objectives of this qualification

This qualification aims to:

- provide learners with the knowledge and skills they need to operate as a successful business administrator
- confirm competence of those already fulfilling a business administration role
- allow learners to develop skills in a range of areas relevant to business administration roles, such as communication, presentation skills and providing administrative support.

The objectives of this qualification are to help learners to:

- develop the skills and qualities valued in employees by employers
- understand and work on their strengths and weaknesses as a business administrator.

Entry guidance

This qualification is designed for learners who are working, or would like to work, in a business administration role within any sector or industry. It's ideal for those who are new to the role or who've been working at that level for a short period of time.

There are no specific recommended prior learning requirements for this qualification/these qualifications. However, learners may find it helpful if they've already achieved a Level 2 qualification.

Entry is at the discretion of the centre. However, learners should be aged 16 or above to undertake this qualification.

Centres are responsible for ensuring that this qualification is appropriate for the age and ability of learners. They need to make sure that learners can fulfil the requirements of the assessment criteria and comply with the relevant literacy, numeracy, and health and safety aspects of this qualification. Learners registered on this qualification shouldn't undertake another qualification at the same level with the same or a similar title, as duplication of learning may affect funding eligibility.

Achieving this qualification

To be awarded the NCFE Level 3 Diploma in Business Administration, learners must achieve a minimum of **58** credits.

- **27** credits from the mandatory units in Group A
- a minimum of **13** credits from Group B
- the remaining credits can be taken from either Group B, C or D – however a maximum of 10 credits from Group C and a maximum of 8 credits from Group D can count towards overall achievement.

A minimum of 40 credits must be achieved at level 3 or above.

Mandatory Group A

- Unit 01 Principles of business (10 credits)
- Unit 02 Principles of business communication and information (4 credits)
- Unit 03 Communicate in a business environment (4 credits)
- Unit 04 Principles of administration (6 credits)
- Unit 05 Manage personal and professional development (3 credits)

Optional Group B

- Unit 06 Contribute to the development and implementation of an information system (6 credits)
- Unit 07 Contribute to the improvement of business performance (6 credits)
- Unit 08 Negotiate in a business environment (4 credits)
- Unit 09 Evaluate the provision of business travel or accommodation (5 credits)
- Unit 10 Develop a presentation (3 credits)
- Unit 11 Manage an office facility (4 credits)
- Unit 12 Provide administrative support in schools (5 credits)
- Unit 13 Build legal case files (5 credits)
- Unit 14 Deliver a presentation (3 credits)
- Unit 15 Analyse and present business data (6 credits)
- Unit 16 Create bespoke business documents (4 credits)
- Unit 17 Manage legal case files (5 credits)
- Unit 18 Administer the recruitment and selection process (3 credits)
- Unit 19 Handle mail (3 credits)
- Unit 20 Organise business travel or accommodation (4 credits)

- Unit 21 Provide administrative support for meetings (4 credits)
- Unit 22 Prepare text from notes using touch typing (4 credits)
- Unit 23 Contribute to the organisation of an event (3 credits)
- Unit 24 Employee rights and responsibilities (2 credits)
- Unit 25 Prepare text from shorthand (6 credits)
- Unit 26 Buddy a colleague to develop their skills (3 credits)
- Unit 27 Store and retrieve information (4 credits)
- Unit 28 Administer finance (4 credits)
- Unit 29 Prepare text from recorded audio instruction (4 credits)
- Unit 30 Administer human resource records (3 credits)
- Unit 31 Produce business documents (3 credits)
- Unit 32 Produce minutes of meetings (3 credits)
- Unit 33 Resolve administrative problems (6 credits)
- Unit 34 Prepare specifications for contracts (4 credits)
- Unit 35 Support environmental sustainability in a business environment (4 credits)
- Unit 36 Administer legal files (5 credits)
- Unit 37 Monitor information systems (8 credits)
- Unit 38 Maintain and issue stationery and supplies (3 credits)

Optional Group C

- Unit 39 Manage team performance (4 credits)
- Unit 40 Participate in a project (3 credits)
- Unit 41 Manage individuals' performance (4 credits)
- Unit 42 Implement and maintain business continuity plans and processes (4 credits)
- Unit 43 Manage individuals' development in the workplace (3 credits)
- Unit 44 Procure products and/or services (5 credits)
- Unit 45 Promote equality, diversity and inclusion in the workplace (3 credits)
- Unit 46 Implement change (5 credits)
- Unit 47 Chair and lead meetings (3 credits)
- Unit 48 Bespoke software (4 credits)
- Unit 49 Spreadsheet software (6 credits)
- Unit 50 Database software (6 credits)
- Unit 51 Word processing software (6 credits)
- Unit 52 Using email (3 credits)
- Unit 53 Organise and deliver customer service (5 credits)
- Unit 54 Resolve customers' complaints (4 credits)
- Unit 55 Manage a budget (4 credits)
- Unit 56 Develop and maintain professional networks (3 credits)

- Unit 57 Manage physical resources (4 credits)
- Unit 58 Prepare for and support quality audits (3 credits)
- Unit 59 Manage business risk (6 credits)
- Unit 60 Manage a project (7 credits)
- Unit 61 Develop and implement an operational plan (5 credits)
- Unit 62 Encourage innovation (4 credits)
- Unit 63 Website software (5 credits)
- Unit 64 Presentation software (6 credits)
- Unit 65 Recruitment, selection and induction practice (6 credits)

Optional Group D

- Unit 66 Principles of digital marketing and research (7 credits)
- Unit 67 Principles of marketing stakeholder relationships (3 credits)
- Unit 68 Principles of market research (5 credits)
- Unit 69 Principles of marketing and evaluation (7 credits)
- Unit 70 Understand the customer service environment (5 credits)
- Unit 71 Understand the legal context of business (6 credits)
- Unit 72 Principles of social media within a business (6 credits)
- Unit 73 Principles of leadership and management (8 credits)

The learning outcomes and assessment criteria for each unit are provided in Section 3 (page 22).

Some units may be available for individual registration. Please visit www.ncfe.org.uk/units for further information.

To achieve the NCFE Level 3 Diploma in Business Administration, learners must successfully demonstrate their achievement of all learning outcomes and assessment criteria of the units as detailed in this qualification specification. Grades are not awarded.

Learners who aren't successful can resubmit work within the registration period; however, a charge may apply. A Credit Certificate can be requested for learners who don't achieve their full qualification but who have achieved at least one whole unit.

Barred units

This qualification contains barred units. These are units that can't be counted together as part of a rule of combination for a qualification. One unit is usually barred against another if there is a lot of overlap between the unit content. If a learner completes units that are barred, they won't all be recognised towards this qualification. Only one of the units will count towards the credit total required to achieve this qualification. Barred units are identified below.

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

Qualifications and awards with simulation and assessment in a Realistic Work Environment (RWE)

Where the assessment strategy for a unit/qualification allows, it is essential that organisations wishing to operate an RWE do so in an environment which reflects a real work setting and replicates the key characteristics of the workplace in which the skill to be assessed is normally employed. This will ensure that any competence achieved in this way will be sustained in real employment.

Progression opportunities

Learners who achieve this qualification could progress to:

- NCFE Level 4 NVQ Diploma in Business Administration
- NCFE Level 3 Diploma in Customer Service
- NCFE Level 4 NVQ Diploma in Customer Service
- NCFE Level 4 Diploma in Management

Progression to Higher Level Studies

This qualification aims to provide learners with a number of progression options, including higher level studies at university or FE colleges. The skills required to progress to higher academic studies are different from those required at Levels 1 and 2. Level 3 qualifications enable the development of these skills. Although there is no single definition of higher level learning skills, they include:

- checking and testing information
- supporting your points with evidence
- self-directed study
- self-motivation
- thinking for yourself
- analysing and synthesising information/materials
- critical thinking and problem solving
- working collaboratively
- reflecting upon learning and identifying improvements.

Level 3 criteria can require learners to analyse, draw conclusions, interpret or justify, which are all examples of higher level skills. This means that evidence provided for the portfolio will also demonstrate the development and use of higher level learning skills.

Credit transfer

Where a learner has already achieved a unit with credit, NCFE will recognise that prior learning and will allow the credit to be transferred onto a new qualification, provided that the units have the same Ofqual reference number.

Exemptions

Exemption allows learners to use evidence of certificated achievement deemed to be of equivalent value against the requirements of a qualification. However, there are no exemptions currently identified for this qualification.

Recognition of Prior Learning (RPL)

Centres may recognise prior learning at their discretion if they are satisfied that the evidence provided meets the requirements of a qualification. Where RPL is to be used extensively (for a whole unit or more), advice must be given by a qualified RPL Advisor.

Qualification dates

Regulated qualifications have operational end dates and certification end dates.

We review qualifications regularly, working with sector representatives, vocational experts and stakeholders to make any changes necessary to meet sector needs and to reflect recent developments.

If a decision is made to withdraw a qualification, we will set an operational end date and provide reasonable notice to our centres. We will also take all reasonable steps to protect the interest of learners.

An operational end date will only show on the Ofqual Register of Regulated Qualifications <https://register.ofqual.gov.uk> and on our website if a decision has been made to withdraw a qualification. After this date we can no longer accept learner registrations. However, certification is allowed until the certification end date so that learners have time to complete any programmes of study. The certification end date will only show on the Ofqual Register once an operational end date has been set. After this date we can no longer process certification claims.

Staffing requirements

Centres delivering any of NCFE's qualifications must:

- have a sufficient number of appropriately qualified/experienced Assessors to assess the volume of learners they intend to register
- have a sufficient number of appropriately qualified/experienced Internal Quality Assurers to internally quality assure the anticipated number of Assessors and learners
- ensure that all staff involved in assessment and internal quality assurance are provided with appropriate training and undertake meaningful and relevant continuing professional development
- implement effective internal quality assurance systems and processes to ensure all assessment decisions are reliable, valid, authentic, sufficient and current. This should include standardisation to ensure consistency of assessment
- provide all staff involved in the assessment process with sufficient time and resources to carry out their roles effectively.

Assessors and Internal Quality Assurance

Staff involved in the Assessment and Internal Quality Assurance of this qualification must be able to demonstrate that they have (or are working towards) the relevant occupational knowledge and/or occupational competence, at the same level or higher as the units being assessed and internal quality assured. This may be gained through experience and/or qualifications.

Examples of relevant qualifications

- Degree in Business Administration-related subject
- Level 4 (NVQ) Diploma in Business Administration
- Staff must hold or be working towards an assessor qualification
- Assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified Assessor/Verifier.

Examples of work experience

- Staff must have recent and relevant experience of working in a mid-level business administration role.
- Teaching specialist in Management or Leadership discipline.

As this qualification is competence-based, please refer to the assessment strategy document available on the qualifications page on our website www.ncfe.org.uk.

Resource requirements

The following document is essential reading for any centre involved in the delivery, assessment and administration of this qualification:

- Skills CFA Assessment Strategy
- e-Skills uk Assessment Strategy

This document can be downloaded from the qualifications page on our website www.ncfe.org.uk.

Support for learners

Learner's Evidence Tracking Log (LETL)

This gives information about this qualification and can help learners keep track of their work. LETLs can be downloaded free of charge from our website www.ncfe.org.uk. You don't have to use the LETL – you can devise your own evidence-tracking documents instead.

Any documents you produce should allow learners to track their achievement against each required learning outcome and assessment criterion and include:

- information on the content, availability and location of NCFE's procedures and policies
- advice on support mechanisms for learners who are experiencing difficulties with their studies
- a mechanism for Assessors and Internal Moderators to authenticate evidence and achievement for each unit.

Support for centres

There are a number of documents available on our website that centres might find useful. These are linked below:

- www.ncfe.org.uk/resources/course-file-documents
- www.ncfe.org.uk/centre-information/assessment-and-moderation-pro-formas

Qualification Support Packs

NCFE offers free Qualification Support Packs (QSPs) for many of our qualifications.

QSPs are a free resource that Tutors can use when planning and delivering an NCFE qualification. Within a QSP, Tutors will find a Scheme of Work, PowerPoint presentation and a wide range of tasks and worksheets to help learners consolidate their knowledge. QSPs are not intended to provide full coverage of learning outcomes and assessment criteria, but the content is mapped to the qualification to ensure it is relevant and useful. If you would like to learn more, or to see which qualifications have QSPs then please visit www.ncfe.org.uk/resources/ncfe-resources/qualification-support-packs.

Centre Support Guide

This explains everything you need to know, from how to apply to become an NCFE-approved centre to registering your learners and claiming their certificates, and everything in between. Centres must seek approval to offer a qualification. Only learners from approved centres can be certificated.

Reasonable Adjustments and Special Considerations Policy

This policy is aimed at our customers - including learners – who use our products and services and who submit requests for reasonable adjustments and special considerations. The policy can be found on our website here:

www.ncfe.org.uk/media/828461/reasonable-adjustments-and-special-considerations-policy-2017.pdf

Subject maps

Our suite of subject maps showcase the qualifications we have available within each specialist sector and how they connect to each other. They demonstrate how you can plot routes for your learners at different levels from entry level right through to higher education or the workforce, with supporting qualifications along the way.

Fees and Pricing

This document is published in the spring for the forthcoming academic year.

Training and support

We can provide training sessions for Assessors and Internal Moderators. Bespoke subject-specific training is also available. For further information please contact our Quality Assurance team on 0191 239 8000.

Learning resources

The resources and materials used in the delivery of this qualification must be age-appropriate and due consideration should be given to the wellbeing and safeguarding of learners in line with your institute's safeguarding policy when developing or selecting delivery materials.

Mapping to National Occupational Standards

National Occupational Standards (NOS) are owned by a Sector Skills Council (SSC) or Standard-Setting Body (SSB) and describe the skills, knowledge and understanding needed to undertake a particular task or job at different levels of competence.

The units and structure of this qualification are based on the Skills CFA NOS for Management and Leadership.

Further information on the NOS used in this qualification can be found on the Skills CFA website <http://www.skillsca.org/>

Mapping to Personal Learning and Thinking Skills (PLTS)

This qualification has been mapped to the PLTS framework. Skills CFA has produced a mapping document which you can find on our qualifications page at www.ncfe.org.uk.

Section 2

Assessment and moderation

Section 2

Assessment and moderation

How the qualification is assessed

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

This qualification must be assessed in line with Skills CFA Assessment Strategy. This document can be downloaded from the qualifications page on our website www.ncfe.org.uk.

The NCFE Level 3 Diploma in Business Administration is internally assessed.

Internal assessment

Each candidate must create a portfolio of evidence which demonstrates achievement of all the learning outcomes and assessment criteria associated with each unit. On completion of each unit candidates must declare that the work produced is their own. The Assessor must countersign this. Examples of suitable evidence for the portfolio for each unit are provided in Section 3 (page 22).

The main pieces of evidence for the portfolio could include (in no particular order):

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

You will also find a variety of assessment and moderation pro-formas here: www.ncfe.org.uk/centre-information/assessment-and-moderation-pro-formas

Evidence must be drawn from actual work situations, with simulation used only in exceptional circumstances.

Please refer to the Skills CFA Assessment Strategy for further information. This can be found on the qualifications page of our website www.ncfe.org.uk.

Assessment guidance is provided for each unit. Assessors can use other methods of assessment as long as they are valid and reliable and maintain the integrity of the assessment and of the standards required of this qualification/these qualifications. Acceptable methods of assessment could be drawn from the list above.

Assessors must be satisfied that candidates have achieved all learning outcomes and assessment criteria related to the unit being assessed, prior to deciding if candidates have been successful. Assessors are also responsible for supporting candidates through the assessment process.

For approval of methods of internal assessment other than portfolio building, please contact the Quality Assurance team on 0191 239 8000.

Moderation

Moderation is the process by which we confirm that assessment decisions in centres are:

- made by competent and qualified Assessors
- the product of sound and fair assessment practice
- recorded accurately and appropriately.

We do this through:

- internal moderation – which you carry out
- external moderation – which we carry out through our External Moderators who, by supporting you, will make sure that assessments meet nationally agreed standards and that your quality assurance systems continue to meet our centre approval criteria.

The Internal Moderator provides the vital link between the Assessors and the External Moderator and acts as the centre's quality assurance agent.

If you'd like to know more about the responsibilities of Assessors and Internal and External Moderators please refer to our Centre Support Guide.

Section 3

Structure and content

Section 3

Structure and content

This section provides details of the structure and content of this qualification.

The unit summary provides an overview of each unit including:

- unit title
- unit overview
- guided learning hours
- credit value
- level
- an indication of whether a unit is mandatory or optional.

Following the unit summary there's detailed information for each unit containing:

- unit title and number
- learning outcomes (the learner will) and assessment criteria (the learner can)
- guidance for developing assessment (an explanation of technical terms and the depth and breadth of coverage of the unit)
- assessment guidance (types of evidence for internal assessment).

The regulators' unit number is indicated in brackets for each unit (eg M/100/7116). However, to make cross-referencing assessment and moderation easier, we've used a sequential numbering system in this document for each unit.

For further information or guidance about this qualification please contact our Research and Product Development team on 0191 239 8000.

Unit summaries

Unit 01 Principles of business (D/506/1942)

This unit aims to provide learners with an understanding of business markets, innovation and growth, financial management, business budgeting and sales and marketing.

Guided learning hours: 74

Credit value: 10

Level: 3

This unit is **mandatory**

Unit 02 Principles of business communication and information (R/506/1940)

The aim of this unit is to provide learners with an understanding of key communication tools in business, such as negotiation, development and delivery of presentations, bespoke business documents and information systems.

Guided learning hours: 27

Credit value: 4

Level: 3

This unit is **mandatory**

Unit 03 Communicate in a business environment (Y/506/1910)

This unit provides learners with an understanding of business communication models, systems and processes. Learners will be able to communicate both verbally and in writing in business.

Guided learning hours: 24

Credit value: 4

Level: 3

This unit is **mandatory**

Unit summaries (cont'd)

Unit 04 Principles of administration (Y/506/1941)

This unit provides learners with an understanding of how to manage an office facility, including health and safety in a business environment. They will understand how to take minutes, chair, lead and manage meetings. Learners will also understand how to supervise an administration team and how to organise events.

Guided learning hours: 27

Credit value: 6

Level: 3

This unit is **mandatory**

Unit 05 Manage personal and professional development (T/506/2952)

The aim of this unit is to equip learners with the ability to identify personal and professional development requirements and to create, fulfil and maintain the relevance of a personal and professional development plan.

Guided learning hours: 12

Credit value: 3

Level: 3

This unit is **mandatory**

Unit 06 Contribute to the development and implementation of an information system (A/506/1916)

This unit aims to provide learners with an understanding of and ability to design and contribute to the development and implementation of an information system.

Guided learning hours: 21

Credit value: 6

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 07 Contribute to the improvement of business performance (D/506/1911)

The aim of this unit is to equip learners with an understanding of the principles of resolving business problems and improvement techniques and processes. Learners will be able to solve problems in business and contribute to the improvement of activities.

Guided learning hours: 33

Credit value: 6

Level: 3

This unit is **optional**

Unit 08 Negotiate in a business environment (H/506/1912)

This unit provides learners with the ability to carry out business negotiations, having prepared for them and gaining an understanding of the principles underpinning negotiation.

Guided learning hours: 18

Credit value: 4

Level: 3

This unit is **optional**

Unit 09 Evaluate the provision of business travel or accommodation (J/506/1918)

This unit aims to provide learners with an understanding of the provision of business travel or accommodation arrangements. The learner will be able to evaluate the quality of and recommend improvements to business travel or accommodation arrangements.

Guided learning hours: 30

Credit value: 5

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 10 Develop a presentation (K/506/1913)

This unit provides learners with an understanding of and ability in presentation development.

Guided learning hours: 11

Credit value: 3

Level: 3

This unit is **optional**

Unit 11 Manage an office facility (K/506/1944)

The aim of this unit is to equip learners with the underpinning knowledge and ability required to manage and maintain an office facility.

Guided learning hours: 21

Credit value: 4

Level: 3

This unit is **optional**

Unit 12 Provide administrative support in schools (L/506/1919)

This unit aims to provide learners with an understanding of administration within a school environment. Learners will be able to provide administrative services and operate school administrative systems and procedures.

Guided learning hours: 33

Credit value: 5

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 13 Build legal case files (L/506/1936)

This unit provides learners with the ability and underpinning knowledge required to build legal case files.

Guided learning hours: 32

Credit value: 5

Level: 3

This unit is **optional**

Unit 14 Deliver a presentation (M/506/1914)

This unit aims to provide learners with an understanding of the principles underpinning the delivery of presentations. Learners will then be able to prepare and deliver a presentation.

Guided learning hours: 17

Credit value: 3

Level: 3

This unit is **optional**

Unit 15 Analyse and present business data (M/506/1945)

The aim of this unit is to provide learners with an understanding of the analysis and presentation of business data. Learners will be able to analyse quantitative and qualitative data and present their analysis.

Guided learning hours: 24

Credit value: 6

Level: 3

This unit is **optional**

Unit 16 Create bespoke business documents (T/506/1915)

This unit aims to provide learners with the knowledge and skills required to understand, design and create bespoke business documents.

Guided learning hours: 23

Credit value: 4

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 17 Manage legal case files (Y/506/1938)

The aim of this unit is to equip learners with the knowledge and skills required to manage legal case files.

Guided learning hours: 32

Credit value: 5

Level: 3

This unit is **optional**

Unit 18 Administer the recruitment and selection process (A/506/1883)

This unit provides learners with an understanding of the recruitment and selection process. Learners will be able to administer both the recruitment and selection processes.

Guided learning hours: 25

Credit value: 3

Level: 2

This unit is **optional**

Unit 19 Handle mail (D/506/1813)

This unit aims to provide learners with an understanding of how to deal with mail, enabling them to deal with both incoming and outgoing mail.

Guided learning hours: 15

Credit value: 3

Level: 2

This unit is **optional**

Unit summaries (cont'd)

Unit 20 Organise business travel or accommodation (D/506/1875)

The aim of this unit is to provide learners with an understanding of the organisation and the ability to research business travel or accommodation arrangements for others.

Guided learning hours: 23
Credit value: 4
Level: 2
This unit is **optional**

Unit 21 Provide administrative support for meetings (H/506/1876)

This unit aims to ensure learners understand the administration of meetings, and are able to make administrative preparations for meetings and support the administration of meetings.

Guided learning hours: 28
Credit value: 4
Level: 2
This unit is **optional**

Unit 22 Prepare text from notes using touch typing (K/506/1815)

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

Guided learning hours: 26
Credit value: 4
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 23 Contribute to the organisation of an event (L/506/1869)

The aim of this unit is to provide learners with an understanding of event organisation. Learners will be able to carry out pre-event actions, set up events and carry out post-event actions.

Guided learning hours: 23
Credit value: 3
Level: 2
This unit is **optional**

Unit 24 Employee rights and responsibilities (L/506/1905)

This unit aims to provide learners with an understanding of the role of organisations and industries, and will also understand employers' expectations and employees' rights and obligations.

Guided learning hours: 16
Credit value: 2
Level: 2
This unit is **optional**

Unit 25 Prepare text from shorthand (M/506/1816)

This unit aims to provide learners with an understanding of and ability to use shorthand to create text.

Guided learning hours: 46
Credit value: 6
Level: 2
This unit is **optional**

Unit 26 Buddy a colleague to develop their skills (M/506/1895)

The aim of this unit is to provide learners with the ability to support a buddy colleague carrying out work activities.

Guided learning hours: 19
Credit value: 3
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 27 Store and retrieve information (R/506/1811)

This unit aims to provide learners with an understanding of information storage and retrieval. Learners will be able to gather, store and retrieve information.

Guided learning hours: 19
Credit value: 4
Level: 2
This unit is **optional**

Unit 28 Administer finance (R/506/1890)

This unit aims to ensure learners understand finance for administrators. Learners will be able to administer finance, recording income and expenditure in accordance with organisational policies and procedures.

Guided learning hours: 21
Credit value: 4
Level: 2
This unit is **optional**

Unit 29 Prepare text from recorded audio instruction (T/506/1817)

The aim of this unit is to provide learners with an understanding of the preparation of text from recorded notes. Learners will be able to prepare text from recorded notes, agreeing on the purpose, format and deadlines for texts, storing texts safely and securely and presenting texts in the required formats within the agreed timescales.

Guided learning hours: 15
Credit value: 4
Level: 2
This unit is **optional**

Unit summaries (cont'd)

Unit 30 Administer human resource records (T/506/1879)

This unit aims to provide learners with an understanding of the administration of human resource (HR) records and the ability to administer HR information.

Guided learning hours: 28
Credit value: 3
Level: 2
This unit is **optional**

Unit 31 Produce business documents (Y/506/1809)

The aim of this unit is to equip learners with the knowledge and ability to prepare business documents, and how to distribute the final documents in the appropriate medium for authorised readers.

Guided learning hours: 24
Credit value: 3
Level: 2
This unit is **optional**

Unit 32 Produce minutes of meetings (Y/506/1812)

This unit aims to provide learners with an understanding of how to take minutes of meetings. Learners will be able to take notes of meetings and produce minutes of meetings.

Guided learning hours: 13
Credit value: 3
Level: 2
This unit is **optional**

Unit 33 Resolve administrative problems (D/506/1956)

The aim of this unit is to equip learners with the skills required to identify and resolve administrative problems, and provides them with the underpinning knowledge to do so.

Guided learning hours: 56
Credit value: 6
Level: 4
This unit is **optional**

Unit summaries (cont'd)

Unit 34 Prepare specifications for contracts (H/506/1957)

This unit aims to provide learners with an understanding of the principles supporting the preparation of specifications for contracts and enables them to prepare these specifications.

Guided learning hours: 23
Credit value: 4
Level: 4
This unit is **optional**

Unit 35 Support environmental sustainability in a business environment (R/506/1954)

This unit aims to provide learners with the knowledge and skills required to implement best practice in environmental sustainability in a business environment.

Guided learning hours: 38
Credit value: 4
Level: 4
This unit is **optional**

Unit 36 Administer legal files (J/506/1935)

The aim of this unit is to equip learners with the knowledge and skills required to administer, maintain, close and archive legal files.

Guided learning hours: 31
Credit value: 5
Level: 3
This unit is **optional**

Unit 37 Monitor information systems (F/506/1917)

The aim of this unit is to equip learners with skills and knowledge required to monitor information systems.

Guided learning hours: 43
Credit value: 8
Level: 3
This unit is **optional**

Unit summaries (cont'd)

Unit 38 Maintain and issue stationery and supplies (Y/506/2295)

This unit aims to provide learners with an understanding of the maintenance of stationery and supplies. Learners will be able to maintain and issue stock of stationery and supplies.

Guided learning hours: 18

Credit value: 3

Level: 2

This unit is **optional**

Unit 39 Manage team performance (A/506/1821)

The aim of this unit is to equip learners with an understanding of managing team performance. Learners will be able to allocate and assure quality of work and to manage communications within a team.

Guided learning hours: 21

Credit value: 4

Level: 3

This unit is **optional**

Unit 40 Participate in a project (F/506/1934)

This unit aims to provide learners with knowledge of project management and the skills required to support the delivery of a project.

Guided learning hours: 19

Credit value: 3

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 41 Manage individuals' performance (J/506/1921)

The aim of this unit is to equip learners with an understanding of management of performance in the workplace. Learners will be able to manage individuals' performance in the workplace.

Guided learning hours: 20

Credit value: 4

Level: 3

This unit is **optional**

Unit 42 Implement and maintain business continuity plans and processes (K/506/1930)

This unit aims to provide learners with the ability to plan for, implement and maintain business continuity plans and processes.

Guided learning hours: 25

Credit value: 4

Level: 3

This unit is **optional**

Unit 43 Manage individuals' development in the workplace (L/506/1922)

The aim of this unit is to equip learners with the skills needed to carry out performance appraisals and support the learning and development of individual team members.

Guided learning hours: 10

Credit value: 3

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 44 Procure products and/or services (M/506/1928)

This unit aims to provide learners with the ability to identify procurement requirements, select suppliers and buy products and/or services.

Guided learning hours: 35

Credit value: 5

Level: 3

This unit is **optional**

Unit 45 Promote equality, diversity and inclusion in the workplace (T/506/1820)

The aim of this unit is to equip learners with an understanding of organisational and personal aspects of equality, diversity and inclusion in the workplace. Learners will also be able to support equality, diversity and inclusion in the workplace.

Guided learning hours: 15

Credit value: 3

Level: 3

This unit is **optional**

Unit 46 Implement change (T/506/1929)

This unit aims to provide learners with an understanding of the principles of change management. Learners will be able to plan, manage and evaluate the implementation of change.

Guided learning hours: 28

Credit value: 5

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 47 Chair and lead meetings (Y/506/1924)

The aim of this unit is to equip learners to prepare to lead meetings, to chair and lead meetings and to deal with post-meeting matters.

Guided learning hours: 10

Credit value: 3

Level: 3

This unit is **optional**

Unit 48 Bespoke software (J/502/4397)

This unit aims to provide learners with the skills required to input and combine information using bespoke software, create and modify appropriate structures to organise and retrieve information efficiently, and exploit functions of the software effectively to process and present information.

Guided learning hours: 30

Credit value: 4

Level: 3

This unit is **optional**

Unit 49 Spreadsheet software (J/502/4626)

The aim of this unit is to equip learners with the ability to use spreadsheets to enter, edit and organise data, use formulas and analysis tools to meet requirements and use tools and techniques to present, format and publish spreadsheet information.

Guided learning hours: 45

Credit value: 6

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 50 Database software (T/502/4556)

The aim of this unit is to provide the learner with skills required to plan, create and modify relational databases; enter, edit and organise structured information in a database and to use database software tools to create, edit and run data queries and produce reports.

Guided learning hours: 45

Credit value: 6

Level: 3

This unit is **optional**

Unit 51 Word processing software (Y/502/4629)

The aim of this unit is to equip learners with the skills required to enter and combine text and other information accurately within word processing documents; create and modify appropriate layouts, structures and styles for word processing documents; and to use word processing software tools and techniques to format and present documents effectively to meet requirements.

Guided learning hours: 45

Credit value: 6

Level: 3

This unit is **optional**

Unit 52 Using email (T/502/4301)

This unit aims to provide learners with the skills and knowledge required to use email software tools and techniques to compose and send messages and manage use of email software effectively.

Guided learning hours: 20

Credit value: 3

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 53 Organise and deliver customer service (L/506/2150)

The aim of this unit is to equip learners with the knowledge and skills required to organise, plan and deliver customer service.

Guided learning hours: 27

Credit value: 5

Level: 3

This unit is **optional**

Unit 54 Resolve customers' complaints (R/506/2151)

This unit aims to provide learners with the knowledge and skills required to monitor and resolve customers' complaints.

Guided learning hours: 22

Credit value: 4

Level: 3

This unit is **optional**

Unit 55 Manage a budget (A/506/1995)

The aim of this unit is to equip learners with an understanding of how to identify financial requirements. Learners will be able to set, manage and evaluate budgets.

Guided learning hours: 26

Credit value: 4

Level: 4

This unit is **optional**

Unit 56 Develop and maintain professional networks (J/506/1949)

This unit aims to provide learners with the knowledge and skills required to network effectively, developing and maintaining professional networks.

Guided learning hours: 15

Credit value: 3

Level: 4

This unit is **optional**

Unit summaries (cont'd)

Unit 57 Manage physical resources (K/506/1989)

The aim of this unit is to equip learners with the ability to identify the need for physical resources. Learners will then obtain and manage physical resources.

Guided learning hours: 26

Credit value: 4

Level: 4

This unit is **optional**

Unit 58 Prepare for and support quality audits (K/506/1992)

This unit aims to provide learners with the knowledge and skills required to prepare for and support quality audits.

Guided learning hours: 17

Credit value: 3

Level: 4

This unit is **optional**

Unit 59 Manage business risk (L/506/2004)

The aim of this unit is to equip learners with the ability to address and mitigate business risk, coupled with an understanding of the management of business risk.

Guided learning hours: 27

Credit value: 6

Level: 4

This unit is **optional**

Unit 60 Manage a project (R/506/1999)

This unit aims to provide learners with the ability to plan, manage and evaluate a project.

Guided learning hours: 38

Credit value: 7

Level: 4

This unit is **optional**

Unit summaries (cont'd)

Unit 61 Develop and implement an operational plan (Y/506/1955)

This unit aims to provide learners with the ability to plan, manage and evaluate an operational plan.

Guided learning hours: 24
Credit value: 5
Level: 4
This unit is **optional**

Unit 62 Encourage innovation (J/506/2292)

This unit aims to provide learners with the ability to identify opportunities for innovation, to generate, test and implement ideas for innovation and improvement.

Guided learning hours: 14
Credit value: 4
Level: 3
This unit is **optional**

Unit 63 Website software (Y/502/4632)

The aim of this unit is to provide learners with the skills and knowledge required to use website software tools to create, publish and test websites with multimedia and interactive features.

Guided learning hours: 40
Credit value: 5
Level: 3
This unit is **optional**

Unit 64 Presentation software (T/502/4623)

This unit aims to provide learners with the skills required to structure, edit, format and prepare an interactive slideshow for presentation.

Guided learning hours: 45
Credit value: 6
Level: 3
This unit is **optional**

Unit summaries (cont'd)

Unit 65 Recruitment, selection and induction practice (R/506/2909)

The aim of this unit is to equip learners with an understanding of the principles and theories underpinning recruitment, selection and induction practice. Learners will be able to recruit people into an organisation and select appropriate people for the role.

Guided learning hours: 33

Credit value: 6

Level: 4

This unit is **optional**

Unit 66 Principles of digital marketing and research (F/502/9937)

This unit aims to provide learners with an understanding of the role of digital marketing and research and techniques used in its implementation.

Guided learning hours: 50

Credit value: 7

Level: 3

This unit is **optional**

Unit 67 Principles of marketing stakeholder relationships (J/502/9938)

The aim of this unit is to equip learners with an understanding of marketing stakeholder relationships, including how to manage and control these relationships.

Guided learning hours: 16

Credit value: 3

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 68 Principles of market research (K/502/9933)

This unit aims to provide learners with knowledge of market research, from the commissioning process, through design, data collection and data interpretation and evaluation.

Guided learning hours: 40

Credit value: 5

Level: 3

This unit is **optional**

Unit 69 Principles of marketing and evaluation (T/502/9935)

The aim of this unit is to equip learners with an understanding of market segmentation, how to assess market opportunities for new products or services, the principles of marketing strategy development and how to evaluate the effectiveness of a marketing strategy.

Guided learning hours: 50

Credit value: 7

Level: 3

This unit is **optional**

Unit 70 Understand the customer service environment (Y/506/2152)

This unit aims to provide learners with an understanding of the relationship between customer service and a brand, the structure of customer service and the implications of legislation on customer service delivery.

Guided learning hours: 40

Credit value: 5

Level: 3

This unit is **optional**

Unit summaries (cont'd)

Unit 71 Understand the legal context of business (D/506/1939)

The aim of this unit is to equip learners with knowledge of the legal framework within which businesses operate, including business governance, contract law and employment law.

Guided learning hours: 44

Credit value: 6

Level: 3

This unit is **optional**

Unit 72 Principles of social media within a business (R/503/9324)

This unit aims to provide learners with an understanding of how social media fits into the objectives and marketing of a business. Learners will understand how to select social media tools and channels for a business and how to measure the success of doing so. Learners will understand how social media policy and guidelines can impact a business and monitor how a business is using social media.

Guided learning hours: 42

Credit value: 6

Level: 3

This unit is **optional**

Unit 73 Principles of leadership and management (F/506/2596)

The aim of this unit is to equip learners with an understanding of the principles of leadership and management, including styles and models of leadership, the role, functions and processes of management and also an understanding of performance measurement.

Guided learning hours: 50

Credit value: 8

Level: 3

This unit is **optional**

Unit 01 Principles of business (D/506/1942)

The learner will:

- 1 Understand business markets

The learner can:

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

The learner will:

- 2 Understand business innovation and growth

The learner can:

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

The learner will:

- 3 Understand financial management

The learner can:

- 3.1 Explain the importance of financial viability for an organisation
 - 3.2 Explain the consequences of poor financial management
 - 3.3 Explain different financial terminology
-

Unit 01 Principles of business (D/506/1942) (cont'd)

The learner will:

- 4 Understand business budgeting

The learner can:

- 4.1 Explain the uses of a budget
 - 4.2 Explain how to manage a budget
-

The learner will:

- 5 Understand sales and marketing

The learner can:

- 5.1 Explain the principles of marketing
 - 5.2 Explain a sales process
 - 5.3 Explain the features and uses of market research
 - 5.4 Explain the value of a brand to an organisation
 - 5.5 Explain the relationship between sales and marketing
-

Unit 01 Principles of business (D/506/1942) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Business markets** are also known as business-to-business (B2B) markets or industrial marketing. They are markets in which goods/services are sold between companies/organisations as opposed to consumer markets.
- 3.3 **Financial terminology** as a minimum should include:
- turnover
 - gross profit
 - net profit
 - debt
 - credit.
-

Unit 02 Principles of business communication and information (R/506/1940)

The learner will:

- 1 Understand negotiation in a business environment

The learner can:

- 1.1 Explain the importance of negotiation in a business environment
 - 1.2 Explain the features and uses of different approaches to negotiation
 - 1.3 Identify the components of negotiation tactics
-

The learner will:

- 2 Understand how to develop and deliver presentations

The learner can:

- 2.1 Explain the different types of presentation and their requirements
 - 2.2 Explain how different resources can be used to develop a presentation
 - 2.3 Explain different methods of giving presentations
 - 2.4 Explain best practice in delivering presentations
 - 2.5 Explain how to collect and use feedback on a presentation
-

The learner will:

- 3 Understand how to create bespoke business documents

The learner can:

- 3.1 Explain the characteristics of bespoke documents
 - 3.2 Explain the factors to be taken into account in creating and presenting bespoke documents
 - 3.3 Explain the legal requirements and procedures for gathering information for bespoke documents
 - 3.4 Explain techniques to create bespoke business documents
 - 3.5 Explain how to gain approval of bespoke documents
-

**Unit 02 Principles of business communication and information
(R/506/1940) (cont'd)**

The learner will:

- 4 Understand information systems in a business environment

The learner can:

- 4.1 Explain the typical stages of information system development
 - 4.2 Analyse the benefits and limitations of different information systems
 - 4.3 Explain legal, security and confidentiality requirements for information systems in a business environment
 - 4.4 Explain how to monitor the use and effectiveness of an information system
-

Unit 02 Principles of business communication and information (R/506/1940) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.2 **Approaches to negotiation** may include, but is not exclusive to:
- breaking down the negotiation into parts
 - taking control
 - prioritising
 - researching and questioning
 - dealing with barriers and ultimatums.
- 2.1 **Presentations** can be electronic or paper-based methods of delivering a message to individuals or a group.
- 3.4 **Techniques** should cover the methods used including software and in-house processes.
- 4.1 **Information systems** may include:
- hardware
 - software
 - infrastructure.
-

Unit 03 Communicate in a business environment (Y/506/1910)

The learner will:

- 1 Understand business communication models, systems and processes

The learner can:

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

The learner will:

- 2 Be able to communicate in writing in business

The learner can:

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

**Unit 03 Communicate in a business environment (Y/506/1910)
(cont'd)**

The learner will:

- 3 Be able to communicate verbally in business

The learner can:

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

Unit 03 Communicate in a business environment (Y/506/1910) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Stakeholders** may include, but are not exclusive to:
- shareholders
 - directors
 - colleagues and managers
 - customers
 - the local community in which a business operates
 - standards agencies.
- 1.3 **Communication systems** may include, but are not exclusive to:
- telephone
 - email
 - face-to-face
 - letter.
- 2.4 **Agreed business practices** to include house styles, and in line with organisational policies.
-

Unit 04 Principles of administration (Y/506/1941)

The learner will:

- 1 Understand how to manage an office facility

The learner can:

- 1.1 Explain the legal requirements relating to the management of office facilities
 - 1.2 Describe the typical services provided by an office facility
 - 1.3 Explain how to establish office management procedures
 - 1.4 Explain how to manage office resources
 - 1.5 Explain techniques to monitor and manage work flows
 - 1.6 Explain typical support and welfare facilities for office workers
-

The learner will:

- 2 Understand health and safety in a business environment

The learner can:

- 2.1 Explain the legal obligations of the employer for health and safety in the workplace
 - 2.2 Explain an individual's responsibilities for health and safety in the workplace
 - 2.3 Describe accident and emergency procedures
-

The learner will:

- 3 Understand how to take minutes of meetings

The learner can:

- 3.1 Explain the purpose of meeting minutes
 - 3.2 Explain the legal implications of meeting minutes
 - 3.3 Explain the importance of accuracy in minute taking
 - 3.4 Describe what should and should not be included in different types of meeting minutes
 - 3.5 Describe how to take notes during meetings
-

Unit 04 Principles of administration (Y/506/1941) (cont'd)

The learner will:

- 4 Understand how to chair, lead and manage meetings

The learner can:

- 4.1 Explain the features and purpose of different types of formal and informal meeting
 - 4.2 Explain the role and responsibilities of the chair
 - 4.3 Explain the role of others in a meeting
 - 4.4 Explain techniques to facilitate a meeting
 - 4.5 Explain the information requirements of a meeting before, during and after a meeting
-

The learner will:

- 5 Understand how to supervise an administration team

The learner can:

- 5.1 Explain the use of targets and budgets to manage workloads
 - 5.2 Explain how to allocate work to individual team members
 - 5.3 Explain different quality management techniques to manage the performance of an administrative team
 - 5.4 Explain the techniques used to identify the need for improvements in team outputs and standards
-

The learner will:

- 6 Understand how to organise events

The learner can:

- 6.1 Explain the characteristics, requirements and purposes of different types of events
 - 6.2 Explain the types of information and information sources needed to organise an event
 - 6.3 Explain how to plan an event
 - 6.4 Explain how to identify the right resources from an event plan
 - 6.5 Describe the likely types of information needed by delegates before, during and after an event
-

Unit 04 Principles of administration (Y/506/1941) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.2 **Typical services** may include:
- purchasing/sales
 - processing customer orders
 - research
 - resolving enquiries.
- 1.6 **Welfare facilities** may include:
- toilets and washrooms
 - drinking water
 - eating areas
 - sufficient ventilation, lighting and temperature.
- 5.3 **Quality management techniques** could include:
- total quality management (TQM)
 - statistical process control (SPC)
 - continual improvement processes.
- 6.1 **Events** may include, but are not limited to:
- a meeting
 - a conference
 - a product launch
 - an announcement
 - a celebration
 - a social occasion.
-

Unit 05 Manage personal and professional development (T/506/2952)

The learner will:

- 1 Be able to identify personal and professional development requirements

The learner can:

- 1.1 Compare sources of information on professional development trends and their validity
 - 1.2 Identify trends and developments that influence the need for professional development
 - 1.3 Evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation
-

The learner will:

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

The learner can:

- 2.1 Evaluate the benefits of personal and professional development
 - 2.2 Explain the basis on which types of development actions are selected
 - 2.3 Identify current and future likely skills, knowledge and experience needs using skills gap analysis
 - 2.4 Agree a personal and professional development plan that is consistent with business needs and personal objectives
 - 2.5 Execute the plan within the agreed budget and timescale
 - 2.6 Take advantage of development opportunities made available by professional networks or professional bodies
-

**Unit 05 Manage personal and professional development
(T/506/2952) (cont'd)**

The learner will:

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

The learner can:

- 3.1 Explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives
 - 3.2 Obtain feedback on performance from a range of valid sources
 - 3.3 Review progress toward personal and professional objectives
 - 3.4 Amend the personal and professional development plan in the light of feedback received from others
-

**Unit 05 Manage personal and professional development
(T/506/2952) (cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 06 Contribute to the development and implementation of an information system (A/506/1916)

The learner will:

- 1 Understand the design and implementation of an information system

The learner can:

- 1.1 Explain the types of information to be managed by a system
 - 1.2 Explain how information will be used and by whom
 - 1.3 Explain who needs to be consulted in the design and implementation of an information system and why
 - 1.4 Explain the impact of legal and organisational security and confidentiality requirements for the design and implementation of an information system
-

The learner will:

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

The learner can:

- 2.1 Confirm the purpose, use and features of an information system
 - 2.2 Identify the information that will be managed by the system
 - 2.3 Confirm requirements for reporting information
 - 2.4 Recommend the functions that will be used to manipulate and report information
 - 2.5 Develop guidance for the use of an information system that is accurate and easy to understand
 - 2.6 Recommend user access and security levels for the information system
 - 2.7 Make contributions to the development of an information system that are consistent with business objectives and values and within budgetary constraints
 - 2.8 Participate in system tests in accordance with the specification
-

Unit 06 Contribute to the development and implementation of an information system (A/506/1916) (cont'd)

The learner will:

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

The learner can:

- 3.1 Implement the information system in accordance with the plan, minimising disruption to business
 - 3.2 Confirm that staff are trained to use the system prior to its launch
 - 3.3 Resolve or report problems or faults with the information system within the limits of their own authority
 - 3.4 Adhere to organisational policies and procedures, and legal and ethical requirements in the implementation of an information system
-

Unit 06 Contribute to the development and implementation of an information system (A/506/1916) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 07 Contribute to the improvement of business performance (D/506/1911)

The learner will:

- 1 Understand the principles of resolving business problems

The learner can:

- 1.1 Explain the use of different problem-solving techniques
 - 1.2 Explain the organisational and legal constraints relating to problem-solving
 - 1.3 Describe the role of stakeholders in problem-solving
 - 1.4 Describe the steps in the business decision-making process
 - 1.5 Analyse the implications of adopting recommendations and implementing decisions to solve business problems
-

The learner will:

- 2 Understand improvement techniques and processes

The learner can:

- 2.1 Describe the purpose and benefits of continuous improvement
 - 2.2 Analyse the features, use and constraints of different continuous improvement techniques and models
 - 2.3 Explain how to carry out a cost-benefit analysis
 - 2.4 Explain the importance of feedback from customers and other stakeholders in continuous improvement
-

Unit 07 Contribute to the improvement of business performance (D/506/1911) (cont'd)

The learner will:

- 3 Be able to solve problems in business

The learner can:

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

The learner will:

- 4 Be able to contribute to the improvement of activities

The learner can:

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

Unit 07 Contribute to the improvement of business performance (D/506/1911) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Problem-solving techniques** may include, but are not exclusive to:
- define and clarify the issue
 - gather all the facts and understand their causes.
 - brainstorm possible options and solutions.
 - consider and compare the pros and cons of each option
 - select the best option
 - explain your decision to those involved and affected.
- 1.2 **Legal constraints** refer to a limit that is set out to regulate how far a person or an organisation can go in regards to a specific matter.
- 1.3 **Stakeholders** may include, but are not exclusive to:
- shareholders
 - directors
 - colleagues and managers
 - customers
 - the local community in which a business operates
 - standards agencies.
- 1.4 The description of how a decision is made will need to be in line with organisational policies and procedures.
- 2.2 **Continuous improvement techniques and models** could include:
- training programmes
 - surveys
 - time studies
 - brainstorming sessions.
- 2.3 **Cost-benefit analysis** refers to a systematic approach for estimating the strengths and weaknesses of different options.

Unit 07 Contribute to the improvement of business performance (D/506/1911) (cont'd)

- 2.4 **Stakeholders** may include, but are not exclusive to:
- shareholders
 - directors
 - colleagues and managers
 - customers
 - the local community in which a business operates
 - standards agencies.
- 3.2 The **scope** of a problem refers to those affected and may include, but not be exclusive to:
- colleagues
 - departments
 - organisation
 - customers
 - resources.
- 3.6 **Approval** must be from the relevant higher authority.
- 4.5 **Standard operating procedures** set out the method, practice and procedures specific to the organisation.
-

Unit 08 Negotiate in a business environment (H/506/1912)

The learner will:

- 1 Understand the principles underpinning negotiation

The learner can:

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

The learner will:

- 2 Be able to prepare for business negotiations

The learner can:

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

The learner will:

- 3 Be able to carry out business negotiations

The learner can:

- 3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities
 - 3.2 Adapt the conduct of the negotiation in accordance with changing circumstances
 - 3.3 Maintain accurate records of negotiations, outcomes and agreements made
 - 3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations
-

Unit 08 Negotiate in a business environment (H/506/1912)
(cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 09 Evaluate the provision of business travel or accommodation (J/506/1918)

The learner will:

- 1 Understand the provision of business travel or accommodation arrangements

The learner can:

- 1.1 Explain the factors to be taken into account in setting evaluation criteria for the provision of business travel or accommodation
 - 1.2 Explain different travel or accommodation-related needs and services
 - 1.3 Explain different arrangements that could be made for the provision of business travel or accommodation
 - 1.4 Explain the scope of legal and organisational security and confidentiality requirements relating to business travel or accommodation
-

The learner will:

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

The learner can:

- 2.1 Assess the performance of providers of travel or accommodation against agreed criteria
 - 2.2 Identify instances of exceptional and inadequate performance
 - 2.3 Evaluate the benefits and limitations of existing arrangements for organising business travel or accommodation and their implications
 - 2.4 Identify alternative potential providers and ways of providing travel or accommodation
-

Unit 09 Evaluate the provision of business travel or accommodation (J/506/1918) (cont'd)

The learner will:

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

The learner can:

- 3.1 Produce costed plans that set out different options, their benefits, limitations and implications
- 3.2 Shortlist alternative potential providers of business travel or accommodation against agreed criteria
- 3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when recommending improvements to arrangements for business travel or accommodation

This unit is barred against:

- Unit 20 Organise business travel or accommodation (D/506/1875)
-

Unit 09 Evaluate the provision of business travel or accommodation (J/506/1918) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Evaluation criteria** may include:
- availability
 - suitability
 - effectiveness.
-

Unit 10 Develop a presentation (K/506/1913)

The learner will:

- 1 Understand how to develop a presentation

The learner can:

- 1.1 Explain best practice in developing presentations
 - 1.2 Explain who needs to be consulted on the development of a presentation
 - 1.3 Explain the factors to be taken into account in developing a presentation
 - 1.4 Analyse the advantages and limitations of different communication media
-

The learner will:

- 2 Be able to develop a presentation

The learner can:

- 2.1 Identify the purpose, content, style, timing and audience for a presentation
 - 2.2 Select a communication media that is appropriate to the nature of a presentation, message and audience
 - 2.3 Tailor a presentation to fit the timescale and audience's needs
 - 2.4 Prepare a presentation that is logically structured, summarises the content and addresses the brief
 - 2.5 Take action to ensure that a presentation adheres to organisational guidelines and policies
 - 2.6 Develop materials that support the content of a presentation
-

Unit 10 Develop a presentation (K/506/1913) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Presentations** can be electronic or paper-based methods of delivering a message to individuals or a group.
- 1.4 **Communication media** refers to the manner in which the information is to be presented:
- visually – on screen, flip chart, white board, paper
 - verbally – face-to-face, teleconference.
- 2.1 **Audience** may include, but is not exclusive to:
- internal – colleagues, managers, other departments
 - external – individuals, companies.
- 2.6 **Materials** may include, but are not exclusive to:
- handouts
 - models.
-

Unit 11 Manage an office facility (K/506/1944)

The learner will:

- 1 Understand the management of an office facility

The learner can:

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

The learner will:

- 2 Be able to manage and maintain an office facility

The learner can:

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

Unit 11 Manage an office facility (K/506/1944) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.3 **Constraints** in a business could include, but not be limited to:
- time
 - financial
 - policies
 - staffing
 - regulations.
- 2.3 **Users** may include, but are not limited to:
- colleagues
 - customers.
-

Unit 12 Provide administrative support in schools (L/506/1919)

The learner will:

- 1 Understand administration within a school environment

The learner can:

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

The learner will:

- 2 Be able to provide administrative services

The learner can:

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

**Unit 12 Provide administrative support in schools (L/506/1919)
(cont'd)**

The learner will:

- 3 Be able to operate school administrative systems and procedures

The learner can:

- 3.1 Maintain accurate records
 - 3.2 Maintain the currency of registers, licences and contracts
 - 3.3 Present reports and statistical returns on time in the agreed format
 - 3.4 Select analysis and evaluation techniques that are appropriate to the purpose of the report and the nature of the information
-

Unit 12 Provide administrative support in schools (L/506/1919) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

2.3 **Documents** may include:

- letters
- emails
- reports
- text messages
- newsletters
- information notices.

3.3 **Present reports** according to:

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

Unit 13 Build legal case files (L/506/1936)

The learner will:

- 1 Understand how to build legal case files

The learner can:

- 1.1 Explain the administrative requirements of the different legal areas being administered
 - 1.2 Explain the scope and limits of their own responsibilities and authority
 - 1.3 Explain the requirements of the duty of confidentiality
 - 1.4 Explain how to identify shortfalls in evidence and materials
 - 1.5 Explain the features and uses of different interviewing techniques
 - 1.6 Explain the use of specialist software for processing legal cases
 - 1.7 Explain how to access and use sources of information and evidence
 - 1.8 Explain the potential consequences of not meeting deadlines when building a legal case file
-

The learner will:

- 2 Be able to build case files

The learner can:

- 2.1 Identify gaps in evidence and materials needed
 - 2.2 Carry out interviews in accordance with the principles of best practice in communication and interviewing
 - 2.3 Obtain evidence and materials needed to complete the file
 - 2.4 Generate correspondence that conforms with the house style and regulatory requirements
 - 2.5 Submit cases on time in line with internal and external deadlines
 - 2.6 Complete follow-up actions in accordance with the instructions
 - 2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when building case files
-

Unit 13 Build legal case files (L/506/1936) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Legal areas** will be defined by the learner's workplace.
- 1.2 **Shortfall** is a failure to attain a specified amount or level - a shortage.
- 1.5 **Interviewing techniques** may include, but are not limited to:
- listening
 - questioning
 - advising
 - taking instruction.
- 2.2 **Best practice** means commercial or professional procedures that are accepted or prescribed as being correct or most effective.
- 2.4 A **house style** is a company's preferred manner of presentation and layout of written material.
- 2.7 A **case file** is a collection of documents and evidence relating to a particular legal case.
-

Unit 14 Deliver a presentation (M/506/1914)

The learner will:

- 1 Understand the principles underpinning the delivery of presentations

The learner can:

- 1.1 Analyse the advantages and limitations of different methods of, and media for, making presentations
 - 1.2 Explain how the type and size of the audience affects the delivery of a presentation
 - 1.3 Explain the factors to be taken into account in developing contingency plans when delivering presentations
 - 1.4 Explain voice projection and timing techniques when delivering presentations
 - 1.5 Explain the factors to be taken into account in responding to questions from an audience
 - 1.6 Explain different methods for evaluating the effectiveness of a presentation
-

The learner will:

- 2 Be able to prepare to deliver a presentation

The learner can:

- 2.1 Confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation
 - 2.2 Develop contingency plans for potential equipment and resource failure
 - 2.3 Take action to ensure that the presentation fits the time slot available
-

Unit 14 Deliver a presentation (M/506/1914) (cont'd)

The learner will:

- 3 Be able to deliver a presentation

The learner can:

- 3.1 Speak clearly and confidently, using language that is appropriate for the topic and the audience
 - 3.2 Vary their voice tone, pace and volume appropriately when delivering a presentation
 - 3.3 Use body language in a way that reinforces messages
 - 3.4 Use equipment and resources effectively when delivering a presentation
 - 3.5 Deliver a presentation within the agreed timeframe
 - 3.6 Respond to questions in a way that meets the audience's needs
 - 3.7 Evaluate the effectiveness of a presentation
-

Unit 14 Deliver a presentation (M/506/1914) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Methods/media** may include:
- chalk and talk
 - OHP (Overhead projection)
 - PowerPoint
 - video clips
 - interactive white board
 - handouts.
- 1.3 **Contingency plans** may include:
- agreement for post-event handouts
 - use of USB sticks
 - secondary emergency equipment
 - pre-event testing of equipment.
- 1.5 **Factors** may include:
- timing
 - listening
 - understanding
 - considering
 - responding
 - referring.
-

Unit 15 Analyse and present business data (M/506/1945)

The learner will:

- 1 Understand the analysis and presentation of business data

The learner can:

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

The learner will:

- 2 Be able to analyse quantitative and qualitative business data

The learner can:

- 2.1 Agree the parameters of the analysis
 - 2.2 Clarify any ethical requirements of the analysis
 - 2.3 Organise the data in a way that will facilitate its analysis
 - 2.4 Select valid and reliable data analysis methods and techniques that are appropriate to the data and analysis objectives
 - 2.5 Apply analytical techniques that are appropriate to the purpose of the research and the nature of the data
 - 2.6 Confirm the accuracy of data analysis and make necessary adjustments
 - 2.7 Draw conclusions that are valid and supported by evidence
-

**Unit 15 Analyse and present business data (M/506/1945)
(cont'd)**

The learner will:

- 3 Be able to present the analysis of business data

The learner can:

- 3.1 Present data in the agreed reporting format and house style
 - 3.2 Acknowledge the limitations of the analysis
 - 3.3 Reference data sources
-

Unit 15 Analyse and present business data (M/506/1945) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

2.5 **Techniques** may include:

- comparing
- contrasting
- measuring
- monitoring.

2.7 **Conclusions:**

- within limits of own responsibility
 - linked to original brief
 - in agreed format.
-

Unit 16 Create bespoke business documents (T/506/1915)

The learner will:

- 1 Understand how to create bespoke business documents

The learner can:

- 1.1 Explain the use of bespoke business documents
 - 1.2 Describe the factors to be taken into account in selecting the appropriate method of presenting a business document
 - 1.3 Describe the use of technology to create bespoke business documents
 - 1.4 Explain the purpose and requirements of corporate identity in bespoke business documents
 - 1.5 Analyse different design techniques used to create attractive bespoke business documents
 - 1.6 Explain the factors to be taken into account in evaluating the impact of bespoke business documents
-

The learner will:

- 2 Be able to design bespoke business documents

The learner can:

- 2.1 Confirm the purpose, nature, content, style, quality standards, audience and deadline of the document
 - 2.2 Identify the optimum method of presenting the document
 - 2.3 Create design options that meet the specification
 - 2.4 Take into account feedback from stakeholders
-

The learner will:

- 3 Be able to create bespoke business documents

The learner can:

- 3.1 Include content that meets the brief, is accurate and grammatically correct
 - 3.2 Use design techniques to create documents that meet the specification
 - 3.3 Integrate non-text items into the agreed layout
 - 3.4 Present documents within the agreed timescale
-

Unit 16 Create bespoke business documents (T/506/1915) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Bespoke** - something that has been tailored, personalised or custom made.
- 1.3 **Technology** may include, but is not exclusive to:
- word processing
 - graphic design
 - publishing software
 - online publishing
 - digital printing
 - blog, vlog and other social media formats.
- 1.3 **Corporate identity** is a collection of visual elements, which are used in various applications to promote the image of an organisation.
- 1.5 **Design techniques** may include, but are not exclusive to:
- graphic design
 - logotype
 - fonts
 - icons
 - symbols.
- 2.4 **Stakeholders** may include, but are not exclusive to:
- shareholders
 - directors
 - colleagues and managers
 - customers
 - the local community in which a business operates
 - standards agencies.
- 3.1 A **brief** is a set of instructions about a job or task.

Unit 16 Create bespoke business documents (T/506/1915) (cont'd)

3.3 **Non-text items** may include, but are not exclusive to:

- icons
 - symbols
 - images or diagrams
 - graphs or charts
 - tables
 - photographs.
-

Unit 17 Manage legal case files (Y/506/1938)

The learner will:

- 1 Understand the management of legal case files

The learner can:

- 1.1 Explain the administrative requirements of the different legal areas being administered
 - 1.2 Explain the scope and limits of their own responsibilities and authority
 - 1.3 Explain the requirements of the duty of confidentiality
 - 1.4 Describe the structure, format and contents of a case file
 - 1.5 Explain how to validate information when managing a legal case file
 - 1.6 Explain the requirements of processing appeals
 - 1.7 Explain the potential consequences of not meeting internal and external deadlines when managing a legal case file
-

The learner will:

- 2 Be able to manage case files

The learner can:

- 2.1 Plan the management of a case file to meet deadlines
 - 2.2 Identify the location of required documents and materials
 - 2.3 Take action to ensure the file contains accurate and up to date information, documents and materials and is secure
 - 2.4 Take action to ensure court bundles are prepared correctly
 - 2.5 Generate correspondence and documents that conform with the requirements of house style and legal and procedural requirements
 - 2.6 Submit documents on time
 - 2.7 Process and record the hearing outcomes in accordance with organisational and procedural requirements
 - 2.8 Close and archive files in accordance with organisational and regulatory requirements
 - 2.9 Keep fee-earners informed of actions taken, progress, developments and problems
 - 2.10 Adhere to organisational policies and procedures, and legal and ethical requirements when managing case files
-

Unit 17 Manage legal case files (Y/506/1938) (cont'd)

Assessment guidance

No assessment guidance available for this unit.

Unit 18 Administer the recruitment and selection process (A/506/1883)

The learner will:

- 1 Understand the recruitment and selection process

The learner can:

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

The learner will:

- 2 Be able to administer the recruitment process

The learner can:

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

**Unit 18 Administer the recruitment and selection process
(A/506/1883) (cont'd)**

The learner will:

- 3 Be able to administer the selection process

The learner can:

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

Unit 18 Administer the recruitment and selection process (A/506/1883) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 2.5 Learners should be able to show awareness of **legal requirements** which may include, but are not limited to:
- employment law
 - Employment Rights Act
 - Equality Act 2010
 - data protection legislation
 - National Minimum Wage Act 1998
 - Working Time Regulations 1998
 - Pensions Act
 - Trade Unions and Labour Relations (Consolidation) Act 1992.
- 3.3 **Pre-employment checks** should cover DRB/CRB reference requests as required for the organisation/role before commencement of employment.
-

Unit 19 Handle mail (D/506/1813)

The learner will:

- 1 Understand how to deal with mail

The learner can:

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

The learner will:

- 2 Be able to deal with incoming mail

The learner can:

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

The learner will:

- 3 Be able to deal with outgoing mail

The learner can:

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

Unit 19 Handle mail (D/506/1813) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 3.2 **Best option** within limits of own authority, eg if the organisation has a contract with a preferred supplier.
-

Unit 20 Organise business travel or accommodation (D/506/1875)

The learner will:

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

The learner can:

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

The learner will:

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

The learner can:

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

Unit 20 Organise business travel or accommodation (D/506/1875) (cont'd)

The learner will:

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

The learner can:

- 3.1 Confirm the requirements for travel or accommodation
- 3.2 Agree arrangements that specify any limitations, prohibitions or responsibilities and which meet the requirements
- 3.3 Prepare and issue itinerary/schedule documentation that reflect agreed arrangements accurately
- 3.4 Obtain travel or accommodation documentation within the required timescale
- 3.5 Confirm the acceptability of payments to be made within the limits of their own authority
- 3.6 Keep up to date records of travel or accommodation arrangements and agreed commitments
- 3.7 Adhere to organisational policies and procedures, legal and ethical requirements when making business travel or accommodation arrangements for others

This unit is barred against:

- Unit 09 Evaluate the provision of business travel or accommodation (J/506/1918)
-

**Unit 20 Organise business travel or accommodation
(D/506/1875) (cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 21 Provide administrative support for meetings (H/506/1876)

The learner will:

- 1 Understand the administration of meetings

The learner can:

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

The learner will:

- 2 Be able to make administrative preparations for meetings

The learner can:

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

**Unit 21 Provide administrative support for meetings
(H/506/1876) (cont'd)**

The learner will:

- 3 Be able to support the administration of meetings

The learner can:

- 3.1 Take action to ensure that the equipment allocated for use at a meeting functions correctly
 - 3.2 Provide support to meetings in accordance with requests
 - 3.3 Ensure the venue is restored to the required conditions after the meeting
 - 3.4 Distribute meeting records promptly to the agreed distribution list
 - 3.5 Carry out any follow-up actions in accordance with the brief
-

**Unit 21 Provide administrative support for meetings
(H/506/1876) (cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 22 Prepare text from notes using touch typing (K/506/1815)

The learner will:

- 1 Understand how to create text from notes

The learner can:

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

The learner will:

- 2 Be able to produce text using touch typing

The learner can:

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

Unit 22 Prepare text from notes using touch typing (K/506/1815) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.4 **Technology features** may refer to a function of an IT application or system.
-

Unit 23 Contribute to the organisation of an event (L/506/1869)

The learner will:

- 1 Understand event organisation

The learner can:

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

The learner will:

- 2 Be able to carry out pre-event actions

The learner can:

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

The learner will:

- 3 Be able to set up an event

The learner can:

- 3.1 Set up layout and resources in accordance with the event plan
- 3.2 Confirm that all identified resources are in place and meet requirements
- 3.3 Behave in a way that maintains organisational values and standards

**Unit 23 Contribute to the organisation of an event (L/506/1869)
(cont'd)**

The learner will:

- 4 Be able to carry out post-event actions

The learner can:

- 4.1 Ensure the venue is restored to the required conditions in accordance with the terms of the contract
 - 4.2 Carry out follow-up actions in accordance with the event plan and agreements made at the event
-

Unit 23 Contribute to the organisation of an event (L/506/1869) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 The **event** may include, but is not exclusive to:
- a meeting
 - an announcement
 - a celebration
 - a social occasion
 - a product launch.
- 1.3 **Resources** may include, but are not exclusive to:
- human resource
 - equipment
 - materials
 - public address systems
 - information technology.
- 2.3 **Pre-event documentation** may include, but is not exclusive to:
- invitations
 - meeting requests
 - preparatory notes
 - agenda
 - menu
 - health and safety forms.
- 2.5 **Special requirements** may include, but are not exclusive to:
- mobility
 - translation or interpretation services
 - hearing loops
 - special dietary requirements
 - allergies
 - travel and accommodation bookings
 - religious or cultural requirements
 - security requirements.
- 3.1 The **layout** includes the arrangement of furniture and other environmental features.

3.2 **Resources** may include, but are not limited to:

- human resource
- equipment
- materials
- public address systems
- information technology.

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

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

Unit 24 Employee rights and responsibilities (L/506/1905)

The learner will:

- 1 Understand the role of organisations and industries

The learner can:

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

The learner will:

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

The learner can:

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

Unit 24 Employee rights and responsibilities (L/506/1905)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 25 Prepare text from shorthand (M/506/1816)

The learner will:

- 1 Understand how to use shorthand to create text

The learner can:

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

The learner will:

- 2 Be able to use shorthand to prepare text

The learner can:

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

Unit 25 Prepare text from shorthand (M/506/1816) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 26 Buddy a colleague to develop their skills (M/506/1895)

The learner will:

- 1 Understand how to buddy a colleague

The learner can:

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

The learner will:

- 2 Be able to plan to buddy a colleague

The learner can:

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

The learner will:

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

The learner can:

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

Unit 26 Buddy a colleague to develop their skills (M/506/1895) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.2 **Techniques** may include:
- choice of medium used to provide feedback
 - giving praise
 - choice of timing, location and approach.
- 1.3 **Techniques** may include:
- body language
 - listening actively
 - speech tone
 - understand strengths and weaknesses of each other
 - collaboration and partnership working
 - build objectives and aims.
-

Unit 27 Store and retrieve information (R/506/1811)

The learner will:

- 1 Understand information storage and retrieval

The learner can:

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

The learner will:

- 2 Be able to gather and store information

The learner can:

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

The learner will:

- 3 Be able to retrieve information

The learner can:

- 3.1 Confirm information to be retrieved and its intended use
 - 3.2 Retrieve the required information within the agreed timescale
-

Unit 27 Store and retrieve information (R/506/1811) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Systems** may include, but are not exclusive to:
- paper
 - electronic
 - organisational systems.
-

Unit 28 Administer finance (R/506/1890)

The learner will:

- 1 Understand finance for administrators

The learner can:

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

The learner will:

- 2 Be able to administer finance

The learner can:

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

Unit 28 Administer finance (R/506/1890) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 29 Prepare text from recorded audio instruction (T/506/1817)

The learner will:

- 1 Understand the preparation of text from recorded notes

The learner can:

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

The learner will:

- 2 Be able to prepare text from recorded notes

The learner can:

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

Unit 29 Prepare text from recorded audio instruction (T/506/1817) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.2 **Types of technology** may include, but are not exclusive to:
- analogue recording
 - digital recording
 - dictation software
 - tape recorders
 - disk recorders.
- 1.3 **Speaking styles** may include, but are not exclusive to:
- accents
 - slang
 - abbreviations
 - mumbling.
-

Unit 30 Administer human resource records (T/506/1879)

The learner will:

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

The learner can:

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

The learner will:

- 2 Be able to administer HR information

The learner can:

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

Unit 30 Administer human resource records (T/506/1879) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.4 **Organisational systems** may be electronic or paper-based.

Unit 31 Produce business documents (Y/506/1809)

The learner will:

- 1 Understand how to prepare business documents

The learner can:

- 1.1 Explain the requirements for language, tone, image and presentation for different documents
 - 1.2 Explain how to integrate images into documents
 - 1.3 Describe how corporate identity impacts upon document production
 - 1.4 Explain the requirements of data protection, copyright and intellectual property legislation relating to document production
 - 1.5 Describe organisational procedures for version control
 - 1.6 Describe security requirements relating to document production
-

The learner will:

- 2 Be able to prepare business documents

The learner can:

- 2.1 Identify the purpose, audience, content, style, format and deadlines of a document
 - 2.2 Use document production resources in line with organisational guidelines
 - 2.3 Use correct grammar, spelling, punctuation and sentence structure
 - 2.4 Produce documents that meet the requirements within the agreed timescale
-

Unit 31 Produce business documents (Y/506/1809) (cont'd)

The learner will:

- 3 Be able to distribute business documents

The learner can:

- 3.1 Provide final documents in the appropriate medium for authorised readers
 - 3.2 Specify restrictions and distribution lists in accordance with the requirements
 - 3.3 Maintain the requirements of security in the production, distribution and storage of documents
-

Unit 31 Produce business documents (Y/506/1809) (cont'd)
Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 2.4 **Requirements** include those of the organisation and the task at hand.
-

Unit 32 Produce minutes of meetings (Y/506/1812)

The learner will:

- 1 Understand how to take minutes of meetings

The learner can:

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

The learner will:

- 2 Be able to take notes of meetings

The learner can:

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

The learner will:

- 3 Be able to produce minutes of meetings

The learner can:

- 3.1 Transcribe notes accurately into meeting minutes using correct language, grammar, punctuation and sentence structure and in the agreed style
 - 3.2 Include agreed attachments or appendices
 - 3.3 Obtain approval for the final documents
 - 3.4 Distribute minutes to the agreed distribution list
 - 3.5 Maintain the requirements of confidentiality
-

Unit 32 Produce minutes of meetings (Y/506/1812) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.1 **Minutes** are a written record of a meeting or hearing.

Meeting records may include, but are not limited to:

- minutes
- agendas
- audio recordings
- video recordings
- secretary's notes.

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

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

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

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

Unit 33 Resolve administrative problems (D/506/1956)

The learner will:

- 1 Understand the principles underpinning the resolution of administrative problems

The learner can:

- 1.1 Evaluate the effectiveness of different types of information on an administrative function
 - 1.2 Explain the basis for selecting tools, techniques and strategies to analyse administrative functions
 - 1.3 Explain the constraints attached to the use of resources needed to resolve administrative problems
 - 1.4 Explain how to apply risk assessment and management techniques to identify and resolve administrative problems
 - 1.5 Analyse the effectiveness of different techniques used to resolve administrative problems
-

The learner will:

- 2 Be able to identify administrative problems

The learner can:

- 2.1 Collect information relevant to the administrative problem
 - 2.2 Use analytical techniques that are appropriate to the administrative problem
 - 2.3 Clarify whether an administrative problem is recurrent, intermittent or a sole instance
 - 2.4 Identify patterns of issues and problems
 - 2.5 Identify the likely cause of an administrative problem
-

Unit 33 Resolve administrative problems (D/506/1956) (cont'd)

The learner will:

- 3 Be able to resolve administrative problems

The learner can:

- 3.1 Select a strategy that is appropriate for the nature, scale, seriousness and priority of the administrative problem
 - 3.2 Develop a plan that addresses the administrative problem whilst minimising disruption to business
 - 3.3 Identify success criteria that are capable of measuring the effectiveness of solutions to solve administrative problems
 - 3.4 Implement a problem-solving plan within the agreed timescale and constraints
 - 3.5 Take action to ensure that systems and processes are capable of preventing future reoccurrences
 - 3.6 Evaluate the effectiveness of problem solving activities
 - 3.7 Adhere to organisational policies and procedures, legal and ethical requirements when resolving administrative problems
-

Unit 33 Resolve administrative problems (D/506/1956) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 **Information** can include, but is not limited to:
- customer/client details
 - financial records
 - project plans and dates.
- 2.2 **Analytical techniques** may include:
- defining the problem not just the symptoms
 - considering different perspectives on the problem
 - understanding how the problem interrelates with other people/departments.
-

Unit 34 Prepare specifications for contracts (H/506/1957)

The learner will:

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

The learner can:

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

The learner will:

- 2 Be able to prepare specifications for contracts

The learner can:

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

Unit 34 Prepare specifications for contracts (H/506/1957) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.3 **Contracts** may cover:
- distribution agreements
 - partnership agreements
 - joint ventures.
-

Unit 35 Support environmental sustainability in a business environment (R/506/1954)

The learner will:

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

The learner can:

- 1.1 Describe current legislation in relation to environmental sustainability in a business environment
 - 1.2 Explain government incentives that support environmental sustainability in a business environment
 - 1.3 Analyse the relationship between environmental sustainability and corporate social responsibility
 - 1.4 Explain the health and safety considerations for environmental sustainability and waste management
 - 1.5 Explain techniques to evaluate the impact of an organisation's environmental and sustainability policies and procedures
-

The learner will:

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

The learner can:

- 2.1 Identify the environmental standards that are relevant to an organisation
 - 2.2 Evaluate the impact of an organisation's business on its environment
 - 2.3 Promote a culture of efficient consumption of energy in line with an organisation's energy management policies
 - 2.4 Establish procedures to minimise waste and maximise the recycling of materials
 - 2.5 Establish procedures to meet hazardous waste regulations
 - 2.6 Adhere to organisational policies and procedures, legal and ethical requirements when implementing best practice in a business environment
-

Unit 35 Support environmental sustainability in a business environment (R/506/1954) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.5 **Techniques** may include, but are not exclusive to:
- compliance audit
 - issues audit
 - health and safety audit
 - site audit
 - corporate audit
 - due diligence audit
 - activity or operational audit
 - product or life cycle audit.
-

Unit 36 Administer legal files (J/506/1935)

The learner will:

- 1 Understand the administration of legal files

The learner can:

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

The learner will:

- 2 Be able to maintain a legal file

The learner can:

- 2.1 Confirm that information on file is complete, accurate and valid
 - 2.2 Process money received from clients in accordance with organisational and regulatory requirements
 - 2.3 Keep fee-earners informed of actions taken, progress, developments and problems
 - 2.4 Take action to ensure that files are correctly labelled and dated including summaries of their contents
 - 2.5 Generate correspondence that conform with the requirements of house style
 - 2.6 Record all time spent, costs and disbursements accurately
 - 2.7 Generate accurate bills that conform with organisational and regulatory requirements
 - 2.8 Adhere to organisational policies and procedures, and legal and ethical requirements when maintaining a legal file
-

Unit 36 Administer legal files (J/506/1935) (cont'd)

The learner will:

- 3 Be able to close and archive a legal file

The learner can:

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

Unit 36 Administer legal files (J/506/1935) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.1 Learners should be able to explain the different **legal areas** they themselves are responsible for.
 - 1.3 The explanation of the **duty of confidentiality** should include relevant and current legislation and practical implications.
 - 1.6 For ACs 1.6 and 1.7 the description/explanation should include reference to appropriate **regulation** and demonstrate an understanding of internal **organisational** procedures. It should also include the **purpose** and potential implications of non-compliance.
-

Unit 37 Monitor information systems (F/506/1917)

The learner will:

- 1 Understand how information systems are used

The learner can:

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

The learner will:

- 2 Be able to monitor information systems

The learner can:

- 2.1 Develop a plan to monitor information systems that specifies objectives, scope, timescale, resource implications, the techniques to be used and reporting requirements
 - 2.2 Carry out monitoring activities in accordance with the plan
 - 2.3 Provide training and support to system users that is appropriate to their needs
 - 2.4 Identify the cause of problems with an information system
 - 2.5 Suggest solutions to problems with an information system
 - 2.6 Recommend adaptations to the system in response to identified problems or developments
 - 2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when monitoring information systems
-

Unit 37 Monitor information systems (F/506/1917) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

1.3 **Information systems** may include:

- hardware
- software
- infrastructure.

Different problem-solving techniques may include, but is not be exclusive to:

- means-end analysis
- inductive reasoning
- rule of thumb (heuristic).

1.7 **Consequences** cover the effects on:

- the individual
 - the organisation
 - the stakeholders.
-

Unit 38 Maintain and issue stationery and supplies (Y/506/2295)

The learner will:

- 1 Understand the maintenance of stationery and supplies

The learner can:

- 1.1 Describe organisational policies, procedures and levels of authority in maintaining supplies
 - 1.2 Explain how to carry out a stock check of stationery
 - 1.3 Describe the types of problems that may occur with deliveries and stock items
 - 1.4 Explain how to deal with problems that occur with deliveries and stock items
 - 1.5 Explain the factors to take into account when ordering stationery
 - 1.6 Explain the benefits and limitations of different potential suppliers, against organisational requirements
 - 1.7 Explain how to calculate quantities of stationery and supplies to be ordered
 - 1.8 Describe how to dispose of or recycle waste
-

The learner will:

- 2 Be able to maintain stocks of stationery and supplies

The learner can:

- 2.1 Maintain stocks of stationery and supplies at the required levels
 - 2.2 Maintain the requirements of storage and security
 - 2.3 Carry out stock checks in accordance with organisational policies and procedures
 - 2.4 Chase up late or incorrect orders with suppliers
-

**Unit 38 Maintain and issue stationery and supplies (Y/506/2295)
(cont'd)**

The learner will:

- 3 Be able to issue stock of stationery and supplies

The learner can:

- 3.1 Issue stationery and supplies in accordance with organisational requirements
 - 3.2 Maintain up to date records of stock issued, received and in storage
 - 3.3 Deal with unwanted or damaged stationery and supplies safely
 - 3.4 Recommend ways in which the system for receiving and issuing stock could be improved
-

Unit 38 Maintain and issue stationery and supplies (Y/506/2295) (cont'd)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.3 **Problems** may include:
- late, damaged or incorrect deliveries of ordered items.
- 1.5 **Factors** may include:
- urgency
 - budget
 - availability of products/delivery time
 - expected usage.
- 2.1 **Required levels** may include those based on statistical information, supply and demand estimation and consideration from others, such as managers.
-

Unit 39 Manage team performance (A/506/1821)

The learner will:

- 1 Understand the management of team performance

The learner can:

- 1.1 Explain the use of benchmarks in managing performance
 - 1.2 Explain a range of quality management techniques to manage team performance
 - 1.3 Describe constraints on the ability to amend priorities and plans
-

The learner will:

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

The learner can:

- 2.1 Identify the strengths, competences and expertise of team members
 - 2.2 Allocate work on the basis of the strengths, competences and expertise of team members
 - 2.3 Identify areas for improvement in team members' performance outputs and standards
 - 2.4 Amend priorities and plans to take account of changing circumstances
 - 2.5 Recommend changes to systems and processes to improve
-

Unit 39 Manage team performance (A/506/1821) (cont'd)

The learner will:

- 3 Be able to manage communications within a team

The learner can:

- 3.1 Explain to team members the lines of communication and authority levels
 - 3.2 Communicate individual and team objectives, responsibilities and priorities
 - 3.3 Use communication methods that are appropriate to the topics, audience and timescales
 - 3.4 Provide support to team members when they need it
 - 3.5 Agree with team members a process for providing feedback on work progress and any issues arising
 - 3.6 Review the effectiveness of team communications and make improvements
-

Unit 39 Manage team performance (A/506/1821) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 40 Participate in a project (F/506/1934)

The learner will:

- 1 Understand how to manage a project

The learner can:

- 1.1 Explain the features of a project business case
 - 1.2 Explain the stages of a project lifecycle
 - 1.3 Explain the roles of people involved in a project
 - 1.4 Explain the uses of project-related information
 - 1.5 Explain the advantages and limitations of different project monitoring techniques
 - 1.6 Analyse the interrelationship of project scope, schedule, finance, risk, quality and resources
-

The learner will:

- 2 Be able to support the delivery of a project

The learner can:

- 2.1 Fulfil their role in accordance with a project plan
 - 2.2 Collect project-related information in accordance with project plans
 - 2.3 Use appropriate tools to analyse project information
 - 2.4 Report on information analysis in the agreed format and timescale
 - 2.5 Draw issues, anomalies and potential problems to the attention of project managers
 - 2.6 Adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project
-

This unit is barred against:

- Unit 60 Manage a project (R/506/1999)
-

Unit 40 Participate in a project (F/506/1934) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 41 Manage individuals' performance (J/506/1921)

The learner will:

- 1 Understand the management of underperformance in the workplace

The learner can:

- 1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance
 - 1.2 Explain how to identify causes of underperformance
 - 1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively
 - 1.4 Explain how to address issues that hamper individuals' performance
 - 1.5 Explain how to agree a course of action to address underperformance
-

The learner will:

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

The learner can:

- 2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives
 - 2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs
 - 2.3 Apply motivation techniques to maintain morale
 - 2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards
 - 2.5 Monitor individuals' progress towards objectives in accordance with agreed plans
 - 2.6 Recognise individuals' achievement of targets and quality standards
 - 2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace
-

Unit 41 Manage individuals' performance (J/506/1921) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 42 Implement and maintain business continuity plans and processes (K/506/1930)

The learner will:

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

The learner can:

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

The learner will:

- 2 Be able to implement business continuity plans and processes

The learner can:

- 2.1 Develop a framework for business continuity management
 - 2.2 Recommend resources that are proportionate to the potential impact of business disruption
 - 2.3 Communicate the importance and requirements of business continuity plans and processes to stakeholders
 - 2.4 Meet their own objectives within the plan
-

Unit 42 Implement and maintain business continuity plans and processes (K/506/1930) (cont'd)

The learner will:

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

The learner can:

- 3.1 Provide training for staff who may be affected
 - 3.2 Validate and test the strength of business continuity plans and processes
 - 3.3 Update plans and processes in the light of feedback from business continuity exercises and other sources of information
-

Unit 42 Implement and maintain business continuity plans and processes (K/506/1930) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 43 Manage individuals' development in the workplace (L/506/1922)

The learner will:

- 1 Be able to carry out performance appraisals

The learner can:

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

The learner will:

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

The learner can:

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

**Unit 43 Manage individuals' development in the workplace
(L/506/1922) (cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 44 Procure products and/or services (M/506/1928)

The learner will:

- 1 Be able to identify procurement requirements

The learner can:

- 1.1 Explain current and likely future procurement requirements
 - 1.2 Decide whether the purchase of products and/or services offers the organisation best value
 - 1.3 Evaluate ethical and sustainability considerations relating to procurement
 - 1.4 Justify the decision to buy products and/or services with evidence of an analysis of risk, costs and benefits
-

The learner will:

- 2 Be able to select suppliers

The learner can:

- 2.1 Explain the factors to be taken into account in selecting suppliers
 - 2.2 Explain organisational procurement policies, procedures and standards
 - 2.3 Explain the effect of supplier choice on the supply chain
 - 2.4 Use appropriate media to publicise procurement requirements
 - 2.5 Confirm the capability and track record of suppliers and their products and/or services
 - 2.6 Select suppliers that meet the procurement specification
-

Unit 44 Procure products and/or services (M/506/1928) (cont'd)

The learner will:

- 3 Be able to buy products and/or services

The learner can:

- 3.1 Explain the action to be taken in the event of problems arising
 - 3.2 Agree contract terms that are mutually acceptable within their own scope of authority
 - 3.3 Record agreements made, stating the specification, contract terms and any post-contract requirements
 - 3.4 Adhere to organisational policies and procedures, legal and ethical requirements
-

Unit 44 Procure products and/or services (M/506/1928) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 45 Promote equality, diversity and inclusion in the workplace (T/506/1820)

The learner will:

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

The learner can:

- 1.1 Explain the difference between equality, diversity and inclusion
 - 1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy
 - 1.3 Explain the potential consequences of breaches of equality legislation
 - 1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion
-

The learner will:

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

The learner can:

- 2.1 Explain the different forms of discrimination and harassment
 - 2.2 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace
 - 2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace
-

The learner will:

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

The learner can:

- 3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace
- 3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace
- 3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace

Unit 45 Promote equality, diversity and inclusion in the workplace (T/506/1820) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 46 Implement change (T/506/1929)

The learner will:

- 1 Understand the principles of change management

The learner can:

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

The learner will:

- 2 Be able to plan the implementation of change

The learner can:

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

Unit 46 Implement change (T/506/1929) (cont'd)

The learner will:

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

The learner can:

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

The learner will:

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

The learner can:

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

Unit 46 Implement change (T/506/1929) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 47 Chair and lead meetings (Y/506/1924)

The learner will:

- 1 Be able to prepare to lead meetings

The learner can:

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

The learner will:

- 2 Be able to chair and lead meetings

The learner can:

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

The learner will:

- 3 Be able to deal with post-meeting matters

The learner can:

- 3.1 Take action to ensure that accurate records of a meeting are produced and distributed in the agreed format and timescale
 - 3.2 Take action to ensure that post-meeting actions are completed
 - 3.3 Evaluate the effectiveness of a meeting and identify points for future improvement
-

Unit 47 Chair and lead meetings (Y/506/1924) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 48 Bespoke Software (J/502/4397)

The learner will:

- 1 Input and combine information using bespoke software

The learner can:

- 1.1 Input relevant information accurately so that it is ready for processing
 - 1.2 Select and use appropriate techniques to link and combine information within the application and across different software applications
-

The learner will:

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

The learner can:

- 2.1 Evaluate the use of software functions to structure, layout and style information
 - 2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently
 - 2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available
-

The learner will:

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

The learner can:

- 3.1 Select and use appropriate tools and techniques to edit, analyse and format information
 - 3.2 Check information meets needs, using IT tools and making corrections as necessary
 - 3.3 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs
 - 3.4 Select and use presentation methods to aid clarity and meaning
-

Unit 48 Bespoke Software (J/502/4397) (cont'd)

Assessment guidance

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 49 Spreadsheet software (J/502/4626)

The learner will:

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

The learner can:

- 1.1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured
 - 1.2 Enter and edit numerical and other data accurately
 - 1.3 Combine and link data from different sources
 - 1.4 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available
-

The learner will:

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

The learner can:

- 2.1 Explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them
 - 2.2 Select and use a wide range of appropriate functions and formulas to meet calculation requirements
 - 2.3 Select and use a range of tools and techniques to analyse and interpret data to meet requirements
 - 2.4 Select and use forecasting tools and techniques
-

Unit 49 Spreadsheet Software (J/502/4626) ((cont'd)

The learner will:

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

The learner can:

- 3.1 Explain how to present and format spreadsheet information effectively to meet needs
 - 3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively
 - 3.3 Select and use appropriate tools and techniques to generate, develop and format charts and graphs
 - 3.4 Select and use appropriate page layout to present, print and publish spreadsheet information
 - 3.5 Explain how to find and sort out any errors in formulas
 - 3.6 Check spreadsheet information meets needs, using IT tools and making corrections as necessary
 - 3.7 Use auditing tools to identify and respond appropriately to any problems with spreadsheets
-

Unit 49 Spreadsheet Software (J/502/4626) (cont'd)

Assessment guidance

Assessment guidance

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 50 Database Software (T/502/4556)

The learner will:

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

The learner can:

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

The learner will:

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

The learner can:

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

Unit 50 Database Software (T/502/4556) (cont'd)

The learner will:

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

The learner can:

- 3.1 Explain how to select, generate and output information from queries according to requirements
 - 3.2 Create and run database queries to display, amend or calculate selected data
 - 3.3 Plan and produce database reports from a multiple-table relational database
 - 3.4 Select and use appropriate tools and techniques to format database reports
 - 3.5 Check reports meet needs, using IT tools and making corrections as necessary
-

Unit 50 Database Software (T/502/4556) (cont'd)

Assessment guidance

Assessment guidance

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 51 Word processing software (Y/502/4629)

The learner will:

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

The learner can:

- 1.1 Summarise what types of information are needed for the document and how they should be linked or integrated
 - 1.2 Use appropriate techniques to enter text and other types of information accurately and efficiently
 - 1.3 Create, use and modify appropriate templates for different types of documents
 - 1.4 Explain how to combine and merge information from other software or multiple documents
 - 1.5 Combine and merge information within a document from a range of sources
 - 1.6 Store and retrieve document and associated files effectively, in line with local guidelines and conventions where available
 - 1.7 Select and use tools and techniques to work with multiple documents or users
 - 1.8 Customise interface to meet needs
-

The learner will:

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

The learner can:

- 2.1 Analyse and explain the requirements for structure and style
 - 2.2 Create, use and modify columns, tables and forms to organise information
 - 2.3 Define and modify styles for document elements
 - 2.4 Select and use tools and techniques to organise and structure long documents
-

Unit 51 Word processing software (Y/502/4629) (cont'd)

The learner will:

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

The learner can:

- 3.1 Explain how the information should be formatted to aid meaning
 - 3.2 Select and use appropriate techniques to format characters and paragraphs
 - 3.3 Select and use appropriate page and section layouts to present and print multi-page and multi-section documents
 - 3.4 Check documents meet needs, using IT tools and making corrections as necessary
 - 3.5 Evaluate the quality of the documents produced to ensure they are fit for purpose
 - 3.6 Respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose
-

Unit 51 Word processing software (Y/502/4629) (cont'd)

Assessment guidance

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 52 Using email (T/502/4301)

The learner will:

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

The learner can:

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

The learner will:

- 2 Manage use of email software effectively

The learner can:

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

Unit 52 Using email (T/502/4301)

Assessment guidance

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 53 Organise and deliver customer service (L/506/2150)

The learner will:

- 1 Understand how to organise customer service delivery

The learner can:

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

The learner will:

- 2 Be able to plan the delivery of customer service

The learner can:

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

**Unit 53 Organise and deliver customer service (L/506/2150)
(cont'd)**

The learner will:

- 3 Be able to deliver customer service

The learner can:

- 3.1 Take steps to ensure that the needs of customers are balanced with organisational objectives
 - 3.2 Agree realistic and achievable actions with customers
 - 3.3 Identify areas for improvement in their own customer service delivery
 - 3.4 Adapt their own customer service delivery to meet customers' changing expectations
-

Unit 53 Organise and deliver customer service (L/506/2150)
(cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 54 Resolve customers' complaints (R/506/2151)

The learner will:

- 1 Understand the monitoring and resolution of customers' complaints

The learner can:

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

Unit 54 Resolve customers' complaints (R/506/2151) (cont'd)

The learner will:

- 2 Be able to deal with customers' complaints

The learner can:

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

Unit 54 Resolve customers' complaints (R/506/2151) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 55 Manage a budget (A/506/1995)

The learner will:

- 1 Understand how to identify financial requirements

The learner can:

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

The learner will:

- 2 Understand how to set budgets

The learner can:

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

The learner will:

- 3 Be able to manage a budget

The learner can:

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

Unit 55 Manage a budget (A/506/1995) (cont'd)

The learner will:

- 4 Be able to evaluate the use of a budget

The learner can:

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

Unit 55 Manage a budget (A/506/1995) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 56 Develop and maintain professional networks (J/506/1949)

The learner will:

- 1 Understand the principles of effective networking

The learner can:

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

The learner will:

- 2 Be able to identify professional networks for development

The learner can:

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

**Unit 56 Develop and maintain professional networks
(J/506/1949) (cont'd)**

The learner will:

- 3 Be able to maintain professional networks

The learner can:

- 3.1 Identify the potential for mutual benefit with network members
 - 3.2 Promote their own skills, knowledge and competence to network members
 - 3.3 Provide information, services or support to network members where the potential for mutual benefit has been identified
 - 3.4 Establish the boundaries of confidentiality
 - 3.5 Agree guidelines for the exchange of information and resources
 - 3.6 Take action to ensure that participation in networks reflects current and defined future aspirations and needs
 - 3.7 Make introductions to people with common or complementary interest to and within networks
-

**Unit 56 Develop and maintain professional networks
(J/506/1949) (cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 57 Manage physical resources (K/506/1989)

The learner will:

- 1 Be able to identify the need for physical resources

The learner can:

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

The learner will:

- 2 Be able to obtain physical resources

The learner can:

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

Unit 57 Manage physical resources (K/506/1989) (cont'd)

The learner will:

- 3 Be able to manage the use of physical resources

The learner can:

- 3.1 Take action to ensure physical resources are used in accordance with manufacturers' instructions
 - 3.2 Evaluate the efficiency of physical resources against agreed criteria
 - 3.3 Recommend improvements to the use of physical resources and associated working practices
 - 3.4 Analyse the benefits of effective equipment in the conservation of energy and the environment
-

Unit 57 Manage physical resources (K/506/1989) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 58 Prepare for and support quality audits (K/506/1992)

The learner will:

- 1 Understand the principles underpinning the management of quality

The learner can:

- 1.1 Analyse the principles of quality management
 - 1.2 Analyse the purpose and requirements of a range of quality standards
 - 1.3 Analyse the advantages and limitations of a range of quality techniques
 - 1.4 Assess how the management of quality contributes to the achievement of organisational objectives
-

The learner will:

- 2 Be able to prepare for quality audits

The learner can:

- 2.1 Establish the quality requirements applicable to the work being audited
 - 2.2 Confirm that documentation is complete
 - 2.3 Confirm that any previously agreed actions have been implemented
 - 2.4 Make available information requested in advance by auditors
-

The learner will:

- 3 Be able to support quality audits

The learner can:

- 3.1 Provide access to information on request within scope of the audit
- 3.2 Agree actions and timescales with auditors that will remedy non-conformance or non-compliance
- 3.3 Identify instances where business processes, quality standards and/or procedures could be improved
- 3.4 Develop a quality improvement plan that addresses the issues raised

**Unit 58 Prepare for and support quality audits (K/506/1992)
(cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 59 Manage business risk (L/506/2004)

The learner will:

- 1 Understand the management of business risk

The learner can:

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

The learner will:

- 2 Be able to address business risk

The learner can:

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

The learner will:

- 3 Be able to mitigate business risk

The learner can:

- 3.1 Develop risk management plans and processes that are proportionate to the risk and the available resources
 - 3.2 Implement risk management plans in accordance with organisational requirements
 - 3.3 Monitor ongoing 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
-

Unit 59 Manage business risk (L/506/2004)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 60 Manage a project (R/506/1999)

The learner will:

- 1 Understand the management of a project

The learner can:

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

The learner will:

- 2 Be able to plan a project

The learner can:

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

Unit 60 Manage a project (R/506/1999) (cont'd)

The learner will:

- 3 Be able to manage a project

The learner can:

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

The learner will:

- 4 Be able to evaluate the effectiveness of a project

The learner can:

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

This unit is barred against:

- Unit 40 Participate in a project (F/506/1934)
-

Unit 60 Manage a project (R/506/1999) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 61 Develop and implement an operational plan (Y/506/1955)

The learner will:

- 1 Understand the principles of operational planning

The learner can:

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

The learner will:

- 2 Be able to develop an operational plan

The learner can:

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

**Unit 61 Develop and implement an operational plan
(Y/506/1955) (cont'd)**

The learner will:

- 3 Be able to implement an operational plan

The learner can:

- 3.1 Implement plans within agreed budgets and timescales
 - 3.2 Communicate the requirements of the plans to those who will be affected
 - 3.3 Revise plans in the light of changing circumstances in accordance with strategic objectives and identified risks
-

The learner will:

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

The learner can:

- 4.1 Conduct periodic reviews of the progress and effectiveness of the plans, using information from a range of sources
 - 4.2 Report on the effectiveness of operational plans in the appropriate format
-

**Unit 61 Develop and implement an operational plan
(Y/506/1955) (cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 62 Encourage innovation (J/506/2292)

The learner will:

- 1 Be able to identify opportunities for innovation

The learner can:

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

The learner will:

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

The learner can:

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

Unit 62 Encourage innovation (J/506/2292) (cont'd)

The learner will:

- 3 Be able to implement innovative ideas and improvements

The learner can:

- 3.1 Explain the risks of implementing innovative ideas and improvements
 - 3.2 Justify conclusions of efficiency and value with evidence
 - 3.3 Prepare costings and schedules of work that will enable efficient implementation
 - 3.4 Design processes that support efficient implementation
-

Unit 62 Encourage innovation (J/506/2292) (cont'd)

Assessment guidance

There is no assessment guidance available for this unit.

Unit 63 Website software (Y/502/4632)

The learner will:

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

The learner can:

- 1.1 Determine what website content and layout will be needed for each page and for the site
 - 1.2 Plan and create web page templates to layout content
 - 1.3 Select and use website features and structures to enhance website navigation and functionality
 - 1.4 Create, select and use styles to enhance website consistency and readability
 - 1.5 Provide guidance on laws, guidelines and constraints that affect the content and use of websites
 - 1.6 Explain what access issues may need to be taken into account
 - 1.7 Explain when and why to use different file types for saving content
 - 1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available
-

The learner will:

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

The learner can:

- 2.1 Prepare content for web pages so that it is ready for editing and formatting
- 2.2 Organise and combine information needed for web pages in line with any copyright constraints, including across different software
- 2.3 Select and use appropriate editing and formatting techniques to aid meaning
- 2.4 Select and use appropriate programming and development techniques to add features and enhance websites
- 2.5 Select and use file formats that make information easier to download
- 2.6 Check web pages meet needs, using IT tools and making corrections as necessary

Unit 63 Website software (Y/502/4632) (cont'd)

The learner will:

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

The learner can:

- 3.1 Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned
 - 3.2 Identify any quality problems with websites and explain how to respond to them
 - 3.3 Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently
 - 3.4 Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose
-

Unit 63 Website software (Y/502/4632) (cont'd)

Assessment guidance

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 64 Presentation software (T/502/4623)

The learner will:

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

The learner can:

- 1.1 Explain what types of information are required for the presentation
 - 1.2 Enter text and other information using layouts appropriate to type of information
 - 1.3 Insert charts and tables and link to source data
 - 1.4 Insert images, video or sound to enhance the presentation
 - 1.5 Identify any constraints which may affect the presentation
 - 1.6 Organise and combine information for presentations in line with any constraints
 - 1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available
-

The learner will:

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

The learner can:

- 2.1 Explain when and how to use and change slide structure and themes to enhance presentations
 - 2.2 Create, amend and use appropriate templates and themes for slides
 - 2.3 Explain how interactive and presentation effects can be used to aid meaning or impact
 - 2.4 Select and use appropriate techniques to edit and format presentations to meet needs
 - 2.5 Create and use interactive elements to enhance presentations
 - 2.6 Select and use animation and transition techniques appropriately to enhance presentations
-

Unit 64 Presentation Software (T/502/4623) (cont'd)

The learner will:

- 3 Prepare interactive slideshow for presentation

The learner can:

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

Unit 64 Presentation Software (T/502/4623) (cont'd)

Assessment guidance

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 65 Recruitment, selection and induction practice (R/506/2909)

The learner will:

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

The learner can:

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

The learner will:

- 2 Be able to recruit people into an organisation

The learner can:

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

**Unit 65 Recruitment, selection and induction practice
(R/506/2909) (cont'd)**

The learner will:

- 3 Be able to select appropriate people for the role

The learner can:

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

- 4 Be able to induct people into an organisation

The learner can:

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

**Unit 65 Recruitment, selection and induction practice
(R/506/2909) (cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 66 Principles of digital marketing and research (F/502/9937)

The learner will:

- 1 Understand the role and requirements of digital marketing

The learner can:

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

The learner will:

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

The learner can:

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

**Unit 66 Principles of digital marketing and research
(F/502/9937) (cont'd)**

The learner will:

- 3 Understand the principles of marketing research using the internet

The learner can:

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

The learner will:

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

The learner can:

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

**Unit 66 Principles of digital marketing and research
(F/502/9937) (cont'd)**

The learner will:

- 5 Understand how to use digital technology for marketing purposes

The learner can:

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

**Unit 66 Principles of digital marketing and research
(F/502/9937) (cont'd)**

Assessment guidance

This unit must be assessed in line with e-Skills uk Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 67 Principles of marketing stakeholder relationships (J/502/9938)

The learner will:

- 1 Understand marketing stakeholder relationships

The learner can:

- 1.1 Explain the basis on which the need for marketing stakeholder relationships are identified and prioritised
 - 1.2 Explain the use of stakeholder mapping in developing ways of building relationships
 - 1.3 Describe the nature of interest of different stakeholder groups and how this affects the nature of relationships and communications
 - 1.4 Explain the significance of stakeholders to the achievement of the overall marketing strategy
 - 1.5 Describe the features of the market in which stakeholders operate
 - 1.6 Describe how to establish stakeholders' attitudes to an organisation
 - 1.7 Describe actual and potential synergies and conflicts between clients and other stakeholders
-

The learner will:

- 2 Understand how to build and manage marketing stakeholder relationships

The learner can:

- 2.1 Explain how to identify common goals and potential synergy between stakeholders and an organisation
 - 2.2 Explain the importance of engaging stakeholders in marketing activities
 - 2.3 Explain the basis upon which stakeholder communications plans are developed
 - 2.4 Explain the requirements of a competitor management strategy
 - 2.5 Explain the importance of agreeing common objectives with clients
 - 2.6 Describe the scope of generalist and specialist personnel that can be deployed in support of building long-term relationships with clients
-

**Unit 67 Principles of marketing stakeholder relationships
(J/502/9938) (cont'd)**

The learner will:

- 3 Understand how to monitor and control marketing stakeholder relationships

The learner can:

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

**Unit 67 Principles of marketing stakeholder relationships
(J/502/9938) (cont'd)**

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 68 Principles of market research (K/502/9933)

The learner will:

- 1 Understand the basis on which market research is commissioned

The learner can:

- 1.1 Describe how to identify the need for market research and the sources of evidence to support this
 - 1.2 Describe the basis for scoping the research and identifying linkages, interdependencies and the possible impact of one element on others
 - 1.3 Explain how to set research parameters, aims and evaluation criteria
 - 1.4 Explain the importance of involving stakeholders in the definition of research to be carried out
 - 1.5 Explain how to evaluate different options for conducting the research
-

The learner will:

- 2 Understand how to design market research projects

The learner can:

- 2.1 Explain how to set research objectives, timescales, budget and resource requirements and success criteria
 - 2.2 Explain how to specify the characteristics and size of the sample to be researched in accordance with the research aims and objectives
 - 2.3 Describe the factors to be taken into account when selecting research instruments that are fit for purpose
 - 2.4 Explain how to ensure the suitability of methods chosen to conduct research
 - 2.5 Explain the strengths and limitations of quantitative and qualitative research
 - 2.6 Explain how risks inherent in market research may be addressed
 - 2.7 Explain how to ensure that research data collected is valid and reliable
 - 2.8 Describe the uses of the research outputs
 - 2.9 Explain how to obtain approval to the proposed research
-

Unit 68 Principles of market research (K/502/9933) (cont'd)

The learner will:

- 3 Understand the principles of marketing data collection

The learner can:

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

The learner will:

- 4 Understand the principles of marketing data interpretation and evaluation

The learner can:

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

Unit 68 Principles of market research (K/502/9933) (cont'd)

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 69 Principles of marketing and evaluation (T/502/9935)

The learner will:

- 1 Understand the principles of market segmentation

The learner can:

- 1.1 Explain the importance of defining market segments to the development and achievement of the marketing strategy
 - 1.2 Explain the difference between market segments and customer classification
 - 1.3 Explain how the characteristics, motivations and behaviours of potential target customers are identified
 - 1.4 Explain how to cluster customers with similar characteristics
 - 1.5 Describe how to confirm that proposed segments are real, distinctive, viable and their buying power measurable
 - 1.6 Explain how to evaluate the profitability and stability of market segments
 - 1.7 Describe how a range of products may appeal to different market segments
 - 1.8 Explain the motivators and inhibitors that influence customer behaviour
 - 1.9 Explain the use of Customer Relationship Management
-

The learner will:

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

The learner can:

- 2.1 Describe the economic and buyer behavioural factors to be taken into account when assessing new market opportunities
 - 2.2 Describe the cultural factors that are likely to affect customers' perception of products and/or services and sales performance
 - 2.3 Explain how to identify opportunities and threats in new markets and for new products in existing markets
 - 2.4 Explain how competitor and potential competitor activity may affect projected sales performance
 - 2.5 Explain the basis of recommendations to exploit new market opportunities
-

**Unit 69 Principles of marketing and evaluation (T/502/9935)
(cont'd)**

The learner will:

- 3 Understand the principles of marketing strategy development

The learner can:

- 3.1 Describe the topics to be addressed in a marketing strategy
 - 3.2 Explain the use of market analyses to inform the development of a marketing strategy
 - 3.3 Explain how to evaluate risks to the achievement of objectives
 - 3.4 Describe how to forecast sales by product and/or service
 - 3.5 Explain how to present a marketing strategy including aims, objectives, actions, accountabilities, resources, budgets and forecasts
 - 3.6 Explain the importance of engaging stakeholders in the development of a marketing strategy
 - 3.7 Explain the significance of customer loyalty to the achievement of marketing objectives and strategy
 - 3.8 Explain how to set performance indicators and evaluation arrangements that are capable of measuring returns on investment
-

**Unit 69 Principles of marketing and evaluation (T/502/9935)
(cont'd)**

The learner will:

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

The learner can:

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

**Unit 69 Principles of marketing and evaluation (T/502/9935)
(cont'd)**

Assessment guidance

This unit must be assessed in line with Skills CFA Sales Standards Assessment Strategy.

Please visit the qualification page on our website www.ncfe.org.uk.

Unit 70 Understand the customer service environment (Y/506/2152)

The learner will:

- 1 Understand the concepts and practices underpinning customer service delivery

The learner can:

- 1.1 Explain the value of customer service as a competitive tool
 - 1.2 Explain the process of mapping the customer journey and its importance in delivering effective customer service
 - 1.3 Describe techniques used to identify service failures
 - 1.4 Explain the concept and importance of the service profit chain
 - 1.5 Describe methods of measuring organisational effectiveness in the delivery of customer service
-

The learner will:

- 2 Understand the relationship between customer service and a brand

The learner can:

- 2.1 Explain the importance of a brand to customers and to an organisation
 - 2.2 Explain how branding can influence customers' perception of an organisation and its products and/or services
 - 2.3 Explain the potential impact of good and poor customer service on a brand
-

**Unit 70 Understand the customer service environment
(Y/506/2152) (cont'd)**

The learner will:

- 3 Understand the structure of customer service

The learner can:

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

The learner will:

- 4 Understand the structure of customer service

The learner can:

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

**Unit 70 Understand the customer service environment
(Y/506/2152) (cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 71 Understand the legal context of business (D/506/1939)

The learner will:

- 1 Understand the legal framework within which businesses operate

The learner can:

- 1.1 Explain the legal requirements of different types of business
 - 1.2 Describe the roles and powers of government departments and agencies in regulating business
 - 1.3 Explain the legal provisions relating to intellectual property
-

The learner will:

- 2 Understand the principles of business governance

The learner can:

- 2.1 Explain the corporate governance statutory framework of a business
 - 2.2 Explain the roles and responsibilities of an organisation's governing body
 - 2.3 Explain the financial reporting requirements of an organisation
-

The learner will:

- 3 Understand how contract law affects a business

The learner can:

- 3.1 Explain the elements of a valid business contract
 - 3.2 Analyse different types of contracts
 - 3.3 Explain the difference between negligence and liability
 - 3.4 Explain the liabilities and entitlements of sellers and purchasers of goods and services
-

**Unit 71 Understand the legal context of business (D/506/1939)
(cont'd)**

The learner will:

- 4 Understand the requirements of employment law

The learner can:

- 4.1 Describe the sources, institutions and enforcement systems for individual employment rights
 - 4.2 Explain the features of types of worker and employment contracts for service
 - 4.3 Explain the implications of contracts of service and contracts for service
 - 4.4 Explain the implications of different types of employment status
 - 4.5 Explain the requirements for an organisation for health and safety
 - 4.6 Explain the requirements for an organisation for equality and diversity
 - 4.7 Explain the implications for an organisation of wrongful dismissal, unfair dismissal and redundancy
 - 4.8 Describe the impact of human rights legislation on the employment relationship
-

Unit 71 Understand the legal context of business (D/506/1939)

Assessment guidance

Assessment guidance is provided below for some assessment criteria. The purpose of this is to clarify and define elements of the assessment criteria as required. Assessment guidance provided is for example purposes only and is not intended to be exhaustive.

Assessment criteria:

- 1.2 **Government departments and agencies** may include, but are not exclusive to:
- the Department for Business, Innovation and Skills (BIS)
 - the Environment Agency
 - the Health and Safety Executive
 - the Driver and Vehicle Licensing Agency
 - the Food Standards Agency.
- 3.2 **Contracts** may include, but are not exclusive to:
- distribution agreements
 - partnership agreements
 - joint ventures.
- 4.4 **Employment status** may include, but is not exclusive to:
- worker
 - employee
 - self-employed and contactor
 - director.
-

Unit 72 Principles of social media within a business (R/503/9324)

The learner will:

- 1 Understand how social media fits into the objectives and marketing of a business

The learner can:

- 1.1 Describe a business and its type, vision, aims, objectives and goals
 - 1.2 Identify the brand and values of a business and how these are portrayed to the audience of a business
 - 1.3 Describe the marketing tools available to a business
 - 1.4 Explain the consequences of using social media on the budget of different sizes and types of business
 - 1.5 Explain the benefits and consequences of encouraging amplification
 - 1.6 Explain the benefits and consequences of encouraging engagement
 - 1.7 Explain the factors to consider when identifying a social media plan for a business
 - 1.8 Explain how social media could fit into the marketing plan of a business
-

The learner will:

- 2 Understand how to select social media tools and channels for a business

The learner can:

- 2.1 Describe the different tools and channels that can be used for social media
 - 2.2 Describe the features and benefits of the different tools and channels that can be used for social media
 - 2.3 Identify the potential type of audience for each different tool and channel that can be used for social media
 - 2.4 Explain the factors to consider when selecting different tools and channels for social media
 - 2.5 Evaluate different tools and channels for social media for business use
-

Unit 72 Principles of social media within a business (R/503/9324) (cont'd)

The learner will:

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

The learner can:

- 3.1 Explain the importance of measuring the outcomes of using different social media tools and channels
 - 3.2 Explain why SMARTER targets should be set for different social media tools and channels
 - 3.3 Describe the methods a business can use to measure and identify success of different social media tools and channels
 - 3.4 Describe what success could look like when using different social media tools and channels for different types and sizes of business
-

The learner will:

- 4 Understand how social media policy and guidelines can impact a business

The learner can:

- 4.1 Describe the components of a business's social media policy and guidelines
 - 4.2 Explain the importance of having a social media policy and guidelines
 - 4.3 Explain the importance of having a reputation management policy
 - 4.4 Describe the benefits of managing perception changes in a business's reputation
 - 4.5 Describe how to manage perception changes in a business's reputation
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**Unit 72 Principles of Social Media within a Business
(R/503/9324) (cont'd)**

The learner will:

- 5 Be able to monitor how a business is using social media

The learner can:

- 5.1 Explain the importance of knowing how similar businesses or industries are using social media
 - 5.2 Explain how to monitor the ways similar businesses or industries are using social media
 - 5.3 Monitor how a business is using social media
 - 5.4 Identify improvements to a business's use of social media
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**Unit 72 Principles of social media within a business
(R/503/9324) (cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Unit 73 Principles of leadership and management (F/506/2596)

The learner will:

- 1 Understand the principles of effective decision making

The learner can:

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

The learner will:

- 2 Understand leadership styles and models

The learner can:

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

Unit 73 Principles of leadership and management (F/506/2596) (cont'd)

The learner will:

- 3 Understand the role, functions and processes of management

The learner can:

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

- 4 Understand performance measurement

The learner can:

- 4.1 Explain the relationship between business objectives and performance measures
 - 4.2 Explain the features of a performance measurement system
 - 4.3 Explain how to set key performance indicators (KPIs)
 - 4.4 Explain the tools, processes and timetable for monitoring and reporting on business performance
 - 4.5 Explain the use of management accounts and management information systems in performance management
 - 4.6 Explain the distinction between outcomes and outputs
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**Unit 73 Principles of leadership and management (F/506/2596)
(cont'd)**

Assessment guidance

There is no assessment guidance available for this unit.

Section 4

Explanation of terms

Explanation of terms

This table explains how the terms used at Level 3 in the unit content are applied to this qualification (not all verbs are used in this qualification).

Apply	Explain how existing knowledge can be linked to new or different situations in practice.
Analyse	Break the subject down into separate parts and examine each part. Show how the main ideas are related and why they are important. Reference to current research or theory may support the analysis.
Clarify	Explain the information in a clear, concise way.
Classify	Organise according to specific criteria.
Collate	Collect and present information arranged in sequence or logical order.
Compare	Examine the subjects in detail and consider the similarities and differences.
Critically compare	This is a development of compare where the learner considers the positive aspects and limitations of the subject.
Consider	Think carefully and write about a problem, action or decision.
Demonstrate	Show an understanding by describing, explaining or illustrating using examples.
Describe	Write about the subject giving detailed information in a logical way.
Develop (a plan/idea which...)	Expand a plan or idea by adding more detail and/or depth of information.
Diagnose	Identify the cause based on valid evidence.
Differentiate	Identify the differences between two or more things.

Discuss	Write a detailed account giving a range of views or opinions.
Distinguish	Explain the difference between two or more items, resources, pieces of information.
Draw conclusions (which...)	Make a final decision or judgment based on reasons.
Estimate	Form an approximate opinion or judgment using previous knowledge or considering other information.
Evaluate	Examine strengths and weaknesses, arguments for and against and/or similarities and differences. Judge the evidence from the different perspectives and make a valid conclusion or reasoned judgement. Reference to current research or theory may support the evaluation.
Explain	Provide detailed information about the subject with reasons showing how or why. Responses could include examples to support these reasons.
Extrapolate	Use existing knowledge to predict possible outcomes which might be outside the norm.
Identify	Recognise and name the main points accurately. (Some description may also be necessary to gain higher marks when using compensatory marking).
Implement	Explain how to put an idea or plan into action.
Interpret	Explain the meaning of something.
Judge	Form an opinion or make a decision.
Justify	Give a satisfactory explanation for actions or decisions.
Plan	Think about and organise information in a logical way using an appropriate format.
Perform	Carry out a task or process to meet the requirements of the question.

Provide	Identify and give relevant and detailed information in relation to the subject.
Review and revise	Look back over the subject and make corrections or changes.
Reflect	Learners should consider their actions, experiences or learning and the implications of this for their practice and/or professional development.
Select	Make an informed choice for a specific purpose.
Show	Supply evidence to demonstrate accurate knowledge and understanding.
State	Give the main points clearly in sentences or paragraphs.
Summarise	Give the main ideas or facts in a concise way.

Section 5

General information

Section 4

General information

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