



TRANSCEND
AWARDS

Transcend Level 3 Diploma in Personal Training

Task D: PT Enterprise Report

Assessment Guidance

Version 01: 01 March 2019

future fit
TRAINING



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Standards

Assessment Guidance			
Enterprise Description	<i>The learner is to identify a clear description of the real or hypothetical enterprise, identifying objective.</i>		U8/LO1/AC1.1
Enterprise Rationale	<i>The learner is to identify the rationale for the enterprise. This may cover local or national needs or absence of similar or adequate support.</i>		U8/LO1/AC1.1
Enterprise Direction	Vision statement	<i>The learner is to confirm the vision for the enterprise.</i>	U8/LO1/AC1.1
	Service offer	<i>The learner is to confirm the services offered by the enterprise.</i>	
Enterprise Funding	<i>The learner is to identify how the enterprise is funded and/or what funds are required.</i>		U8/LO1/AC1.3
Enterprise operations start date	<i>The learner is to identify the date the enterprise has or is (if hypothetical) to commence operations.</i>		N/A

Section Two: Market Analysis

2.1 Macro-environmental analysis

PESTLE		U8/LO1/AC1.1
<p><i>Assessment attainment indicators: breadth</i> The learner is to produce a PESTLE analysis for their PT enterprise to consider:</p> <ul style="list-style-type: none"> • <i>Political: regulation, health and obesity crisis,</i> • <i>Economic: taxation, socioeconomic considerations, facility cost, service cost, inflation</i> • <i>Social: local demographics, culture, leisure interest, attitudes to personal training and health</i> • <i>Technological: technology available, cost, use, competitor's approach, impact on product offer</i> • <i>Legal: privacy, equality, health and safety</i> • <i>Environmental: location, recycling, waster, renewable energy</i> <p><i>Assessment attainment indicators: depth</i> The learner should consider a range of factors in each category. Responses should be relevant to their enterprise</p>		
Market Size and share	<p><i>Assessment attainment indicators: breadth</i> The learner identify size of the market [either nationally or locally as appropriate]. They should confirm the leading providers based on the nature of the service supply, demand and location.</p> <p><i>Assessment attainment indicators: depth</i> The learner must support responses with clear and credible sources and figures to support claims regarding size and share. All material should be sourced appropriately.</p>	U8/LO1/AC1.2
Market trends	<p><i>Assessment attainment indicators: breadth</i> The learner must identify recent market trends.</p> <p><i>Assessment attainment indicators: depth</i> The learner must support responses with clear and credible sources and figures to support claims regarding trends. All material should be sourced appropriately.</p>	U8/LO1/AC1.2

2.2 Meso-environmental analysis

Industry analysis: client services		U8/LO1/AC1.2
Service demand	<p><i>Assessment attainment indicators: breadth</i> The learner is to provide an overview of demand for personal training services.</p> <p><i>Assessment attainment indicators: depth</i> The learner must support response with clear and credible sources and figures to support claims regarding demand. All material should be sourced appropriately. The response should be relevant to their PT enterprise.</p>	
Service supply	<p><i>Assessment attainment indicators: breadth</i> The learner is to provide an overview of the supply of services in response to demand.</p> <p><i>Assessment attainment indicators: depth</i> The learner must support response with clear and credible sources and figures to support claims regarding supply. All material should be sourced appropriately. The response should be relevant to their PT enterprise.</p>	
Client demographics and demands	<p><i>Assessment attainment indicators: breadth</i> The learner is to provide an overview of the client's who will or are most likely to interact with the service offer, identifying their particular demands and needs as well as demographics. This can extend beyond physical needs and may include, for example, technological needs, such as online monitoring of performance and results.</p> <p><i>Assessment attainment indicators: depth</i> The learner must support responses with clear and credible sources and figures to support claims regarding supply. All material should be sourced appropriately. The response should be relevant to their PT enterprise.</p>	

Industry analysis: competitors				U8/LO1/AC1.2
Competitors	Competitor 1 name	Insert competitor 1	Competitor 2 name	Insert competitor 2
Competitor profile	<p><i>Assessment attainment indicators: breadth</i> The learner should provide a profile of at least two competitors. Competitors should be drawn based on service or locality.</p> <p><i>Assessment attainment indicators: depth</i> The template must be completed in full and competitor's must be real.</p>			
Client services + prices				
Core target market				
Marketing strategies				
Competitor strengths				
Competitor weaknesses				
Competitive advantage				

2.3 Micro-environmental analysis

Organisational analysis		U8/LO1/AC1.2
Evaluate the legal, regulatory and policy requirements to ensure an effective PT enterprise	<p><i>Assessment attainment indicators: breadth</i> The learner is required to provide an overview of the legal, regulatory and policy requirements which will or could impact on the success of the enterprise.</p> <p><i>Assessment attainment indicators: depth</i> The learner is to provide examples of how each issue will impact on the enterprise. Examples include loss of business, loss of revenue, loss of license. The requirements identified must be clearly linked to the industry and the service offer identified. For example, if the enterprise is focussed on working with young people, legal, regulatory and policy requirements should be considered – for example safeguarding.</p>	
Evaluate the management and workforce requirements to ensure an PT enterprise	<p><i>Assessment attainment indicators: breadth</i> The learner is required to provide an overview of the management and workforce requirements which will or could impact on the success of the enterprise.</p> <p><i>Assessment attainment indicators: depth</i> The learner is to provide examples of how requirements impact on the enterprise. Examples include qualifications and training required, work experience and the number and type of staff expected to meet demand and safety considerations.</p>	
Evaluate the facility requirements to ensure an effective PT enterprise	<p><i>Assessment attainment indicators: breadth</i> The learner is required to provide an overview of the facility requirements which will or could impact on the success of the enterprise.</p> <p><i>Assessment attainment indicators: depth</i> The learner is to provide examples of how requirements impact on the enterprise. Examples include building and surrounding area requirements (such as parking) as well as accessibility and equipment issues.</p>	

<p>Evaluate the impact of ethical and legislative practice on the use of information technology</p>	<p><i>Assessment attainment indicators: breadth</i> The learner is required to a review of ethical and legislative practice on the use of IT. This should refer to GDPR and social media.</p> <p><i>Assessment attainment indicators: depth</i> The learner is to provide examples of how these requirements would impact on their PT enterprise.</p>	<p>U6/LO2/AC2.1</p>
<p>Evaluate the impact of IT and data on business operations</p>	<p><i>Assessment attainment indicators: breadth</i> The learner is required to evaluate the impact of IT and data business operations for example enterprise for example administrative and customer engagement.</p> <p><i>Assessment attainment indicators: depth</i> The learner is to consider the impact this could have on their PT enterprise.</p>	<p>U6/LO2/AC2.2</p>
<p>Evaluate the impact of technological advancements on customer experience to increase physical activity levels, motivation and focus</p>	<p><i>Assessment attainment indicators: breadth</i> The learner is required to evaluate the impact of technological advancements on customer experience to increase physical activity levels, motivation and focus.</p> <p><i>Assessment attainment indicators: depth</i> The learner is to consider the impact this could have on their PT enterprise.</p>	<p>U6/LO2/AC2.3</p>
<p>Evaluate funding required to ensure an effective PT enterprise</p>	<p><i>Assessment attainment indicators: breadth</i> The learner is expected to identify the amount of money required in the start up and launch phase of their PT enterprise.</p> <p><i>Assessment attainment indicators: depth</i> The learner should identify an overall start up cost with justifications.</p>	<p>U8/LO1/AC1.1 U8/LO1/AC1.2 U8/LO1/AC1.3</p>

Section Three: Strategic Direction

<p>Vision statement</p>	<p><i>Assessment attainment indicators: breadth</i> The learner must confirm a vision statement for their PT enterprise.</p> <p><i>Assessment attainment indicators: depth</i> The vision statement should outline what the PT enterprise would like to ultimately achieve It should be short, simple, specific to the business. It should leave nothing open to interpretation and should have ambition.</p>	<p>U8/LO1/AC1.1</p>
<p>Mission statement</p>	<p><i>Assessment attainment indicators: breadth</i> The learner must confirm a mission statement for their PT enterprise.</p> <p><i>Assessment attainment indicators: depth</i> The mission statement should inspire and provide a clarity of purpose and the benefit to customers.</p>	<p>U8/LO1/AC1.1</p>
<p>Values</p>	<p><i>Assessment attainment indicators: breadth</i> The learner must confirm the core values for their PT enterprise.</p> <p><i>Assessment attainment indicators: depth</i> The learner must ensure that the values are the fundamental beliefs upon which the business and its behaviour are based. They are the guiding principles that the business uses to manage its internal affairs as well as its relationship with customers.</p>	<p>U8/LO1/AC1.1</p>
<p>Client services scope and fees</p>	<p>The learner is to insert the list of services their PT enterprise intends to offer and the fees they will charge for these.</p>	
<p>Client service goals</p>	<p>The learner is to identify clear service goals, which may relate to client numbers and retention levels.</p>	<p>The learner is to identify a KPI against stated goals for each goal identified.</p>

Section Four: Operational plan

Organisational, management and workforce structure		U8/LO1/AC1.1
<p><i>Assessment attainment indicators: breadth</i> The learner is to provide an overview of the human resources required to facilitate efficient delivery.</p> <p><i>Assessment attainment indicators: depth</i> The learner is required to consider organisational, management and workforce structures, identifying lines of responsibilities and hierarchy, with justifications. This should ideally be represented in diagrammatical format.</p>		
Facilities plan		U8/LO1/AC1.1
HQ, facilities and environment selected to support the operation	<p><i>Assessment attainment indicators: breadth</i> The learner is to provide an overview of the physical resources required.</p>	
Equipment and environment selected to maximise the customer experience	<p><i>Assessment attainment indicators: depth</i> The learner is required to cover requirements for staff and customers, with justifications rooted in reality and in consideration of associated costs.</p>	
IT plan		U8/LO1/AC1.3
IT solutions selected to support the business operation	<p><i>Assessment attainment indicators: breadth</i> The learner is to provide an overview of the technological resources required.</p>	
IT solutions selected to maximise the customer experience	<p><i>Assessment attainment indicators: depth</i> The learner is required to identify various IT requirements which cover both business proficiency and the customer experience, with justifications rooted in reality, in consideration of associated costs and with a focus on privacy and suitability.</p>	

Financial plan

U8/LO3/AC1.2

Assessment attainment indicators: breadth

The learner is to provide a list of fixed costs [overheads] and variable costs [e.g. petrol if they are traveling to client's houses or venues if they are using additional sports halls dependent upon group training needs – this is an example only]. They should be able to confirm monthly income considering best and worst-case estimates.

Assessment attainment indicators: depth

The learner is required to provide a realistic profit and loss forecast for the first annual cycle using information drawn from their market research.

Marketing plan		U8/LO2/AC1.2
Brand Recognition Programme [The Enterprise]	Marketing tools	<p><i>Assessment attainment indicators: breadth</i></p> <p>The learner is to provide an overview of the marketing tools, strategies and techniques which will be deployed to support the launch of the enterprise and its brand.</p>
	Marketing strategies and techniques	<p><i>Assessment attainment indicators: depth</i></p> <p>The learner is required to consider a variety of methods considering traditional and modern marketing techniques for example use of social media to generate brand awareness.</p>
Campaign planning [The Client Services]	Campaign tools	<p><i>Assessment attainment indicators: breadth</i></p> <p>The learner is to provide an overview of the marketing tools, strategies and techniques which will be deployed to promote the service offer and engage clients.</p>
	Campaign strategies	<p><i>Assessment attainment indicators: depth</i></p> <p>The learner is required to consider a variety of methods considering traditional and modern marketing techniques for example use of social media to generate brand awareness.</p>
Operational SWOT		U8/LO1/AC1.2
<p><i>Assessment attainment indicators: breadth</i></p> <p>The learner is to provide a SWOT analysis as outlined:</p> <ul style="list-style-type: none"> • Strengths: internal environment [example – highly qualified team] • Weaknesses: internal environment [small team in start-up phase] • Opportunities: external environment [competitor gaps in services] • Threats: external environment [competition brands and reliance on marketing to generate customers] <p><i>Assessment attainment indicators: depth</i></p> <p>The SWOT should be fully aligned to the strategic direction, operational plan and research conducted.</p>		