OCR

ADVANCED APPRENTICESHIPS

STUDENT GUIDE

LEVEL 3 NVQ CERTIFICATE IN
MANAGEMENT (03367)

STUDENT GUIDE INTRODUCTION

You are about to start an OCR Level 3 NVQ Certificate in Management. We wish you every success and hope that this will be one of many OCR qualifications which you take throughout your life.

This guide has been designed to give you information about:
- the aims and structure of your qualification
- the people who will be involved in your qualification and what they will do
- the assessment process you will go through in order to gain your qualification
- how to plan, collect and organise information to show that you are competent at your job
- the evidence you have to collect to show you can work to those standards
- any extra forms you will use to help you

ARE YOU STUDYING THIS QUALIFICATION AS PART OF AN ADVANCED APPRENTICESHIP FRAMEWORK?

The framework describes the qualifications that an apprentice has to achieve to successfully complete an Apprenticeship.

The components in this Apprenticeship are:

COMPETENCE	TECHNICAL KNOWLEDGE	KEY SKILLS/ FUNCTIONAL SKILLS/ ESSENTIAL SKILLS WALES	EMPLOYMENT RIGHTS AND RESPONSIBILITIES	PERSONAL LEARNING AND THINKING SKILLS
Level 3 NVQ Certificate in Management	Level 3 Certificate in Management	Maths Level 2 English Level 2 ICT Level 1	Embedded in Knowledge Based Element	The PLTS component has been mapped to the mandatory NVQ units and the coverage can be found at the following link www.cfa.uk.com/ apprenticeships/ resources. Where the mapping shows the PLTS are not fully covered by the units, the remaining PLTS must be integrated into the Apprenticeship programme. PLTS not applicable in Wales.

This qualification satisfies the technical knowledge part required to complete an Apprenticeship in Management.

ABOUT THIS QUALIFICATION

This qualification is aimed at individuals who have responsibility for the work of others, as they lead a team. It is suitable for people who are entering a management role, or who have the ability and the opportunity to demonstrate recognisable management and leadership skills, for example, providing leadership for a team, encouraging innovation, allocating and checking work.

QUALIFICATION AIMS

This qualification recognises the skills and competences of candidates in the workplace and provides individuals with the opportunity to demonstrate the competences needed for a career as a manager. The units encompass a broad range of competencies from the management and leadership sector.

QUALIFICATION STRUCTURE

This qualification is made up of smaller units which can be selected according to your requirements. All of the units provide details of how they relate to the National Occupational Standards. There are two types of units:

Mandatory units – this covers core information for the qualification and must be completed

Optional units – you will be able to choose from a number of optional units. You will receive help to choose the best optional units to match your job or interests.

Each unit has:
* **a unit aim** - this explains what the unit is all about and relates the unit content to typical tasks you may carry out
* **learning outcomes** - these set out what you are expected to know, understand or be able to do as a result of the learning process
* **assessment criteria** - these detail the requirements that you will be assessed against in order to evidence the learning outcomes.
* **evidence requirements** - these detail the context in which the learning outcomes and assessment criteria should be met.
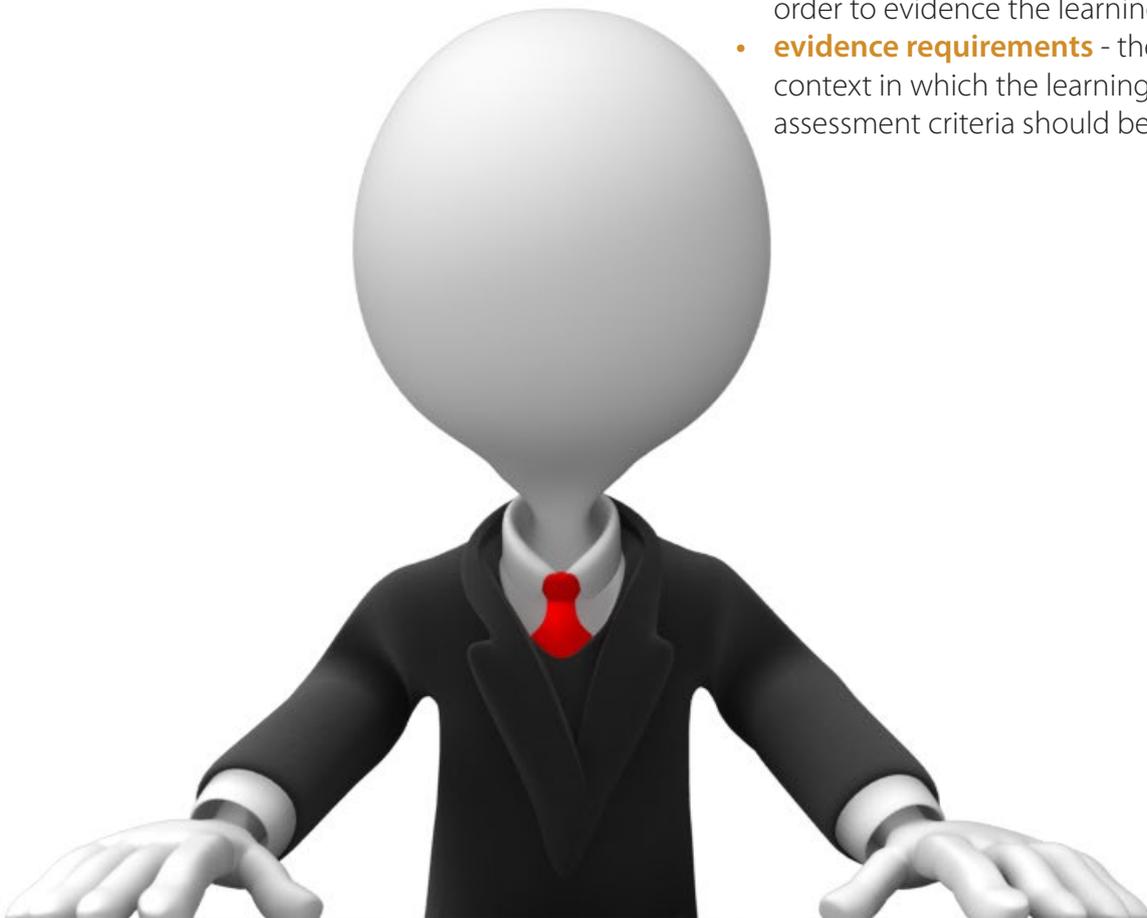
WHO WILL BE INVOLVED IN YOUR QUALIFICATION

Assessment of your qualification is carried out at your centre. Your centre may be your place of work, a college, training agency or combination of these. The people involved in the assessment process are listed below.

An **assessor** (this may be your manager at work) will:
• Help you plan and organise your workload and evidence
• Ask questions and provide feedback
• Examine your portfolio of evidence
• Assess your knowledge and understanding
• Judge when you meet the required standard

An **internal verifier**:
• is employed by your centre to maintain the quality of assessment within the centre
• will visit your place of work to see you being assessed and may wish to speak with you
• will check the assessment of your portfolio of evidence
• will check your assessor is following correct assessment procedures.

An **external verifier**:
• is contracted by OCR to ensure that your centre meets the required standard
• will make visits to your centre to observe assessment and examine evidence in portfolios
• may wish to speak with you as part of this process
• will check the centre is following the correct assessment and verification procedures.

Witnesses
These are normally people in your workplace who regularly see you doing your job and know how your job should be done. As you plan your assessment with your assessor you will be asked to think about who these people are. They may be your supervisor or line manager.
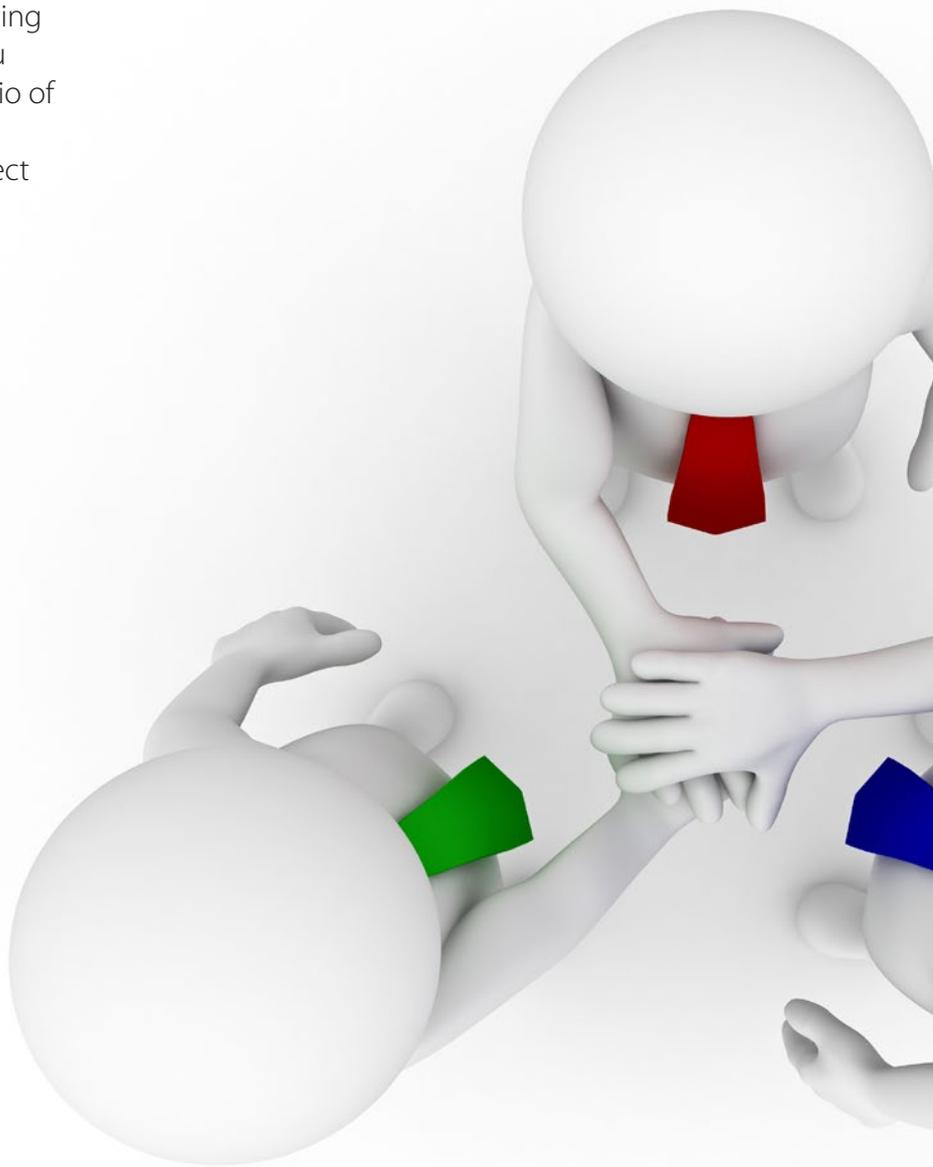
ASSESSMENT

In order for you to effectively progress towards meeting the requirements of each assessment criterion, teachers/tutors must make sure that the supporting knowledge, understanding and skills requirements for each criterion are fully addressed.

When your assessor is satisfied that you have met all of the requirements for a unit, they must confirm this by signing an evidence record sheet for that unit to show that the assessment process is complete.

INITIAL ASSESSMENT

Before you begin this qualification, you must have received some form of initial assessment. Initial assessment determines your starting point. It identifies any competence or knowledge you already have, and also shows where there are any gaps in your knowledge. Initial assessment is undertaken to help plan your progress through this qualification because it allows your assessor to help you understand the best place to start collecting evidence. It will also identify units which you might have difficulty finishing.

Your assessor will spend time with you at the start of your programme making sure that you:
- are taking the right level of qualification
- understand which mandatory units you have to take
- have chosen the optional units you want to take
- understand what you need to know or learn to gain the qualification
- understand what you have to do to collect evidence to meet the required standard
- agree an assessment plan
- agree and sign a learning contract.

ASSESSMENT PLANNING

Your assessor will agree a number of issues with you including:
- finding the best source of evidence to use for particular units
- finding the best way of assessing you
- confirming the best times, dates and places for the assessments to take place.

Your assessors will make a note of their assessment planning and regularly give you feedback.

With your assessor you will make and agree an assessment plan. This will show:
- the units the plan covers
- when you will be observed
- where you will be observed
- what you will be doing
- what evidence you will produce.

Your assessor will be looking to find tasks which will produce evidence for more than one unit. You may be able to produce evidence for more than one unit at a time.

The assessment plan is very important as it will help you prepare for the assessment. You may need to agree with other people when you are to be assessed, especially if you work in a team. You must let your supervisor or manager know so that, as far as possible, your work does not change on the day the assessment is planned.

Each time you prepare with your assessor for an assessment in your workplace, you will make an assessment plan. You will review, update and amend your plan many times as you progress through your qualification. This is called the assessment planning cycle.

ASSESSMENT EVIDENCE

There are various assessment methods that can be used as evidence for this qualification. These will be explained in more detail in the next section of this logbook.

ASSESSMENT FEEDBACK

Your assessor will give you specific feedback on your performance after assessment. You will also meet regularly to review your progress and evidence, and update your assessment plan.

ASSESSMENT DECISIONS

When you think you have completed a unit, your assessor will make the final assessment decision. Remember that you must provide enough evidence to meet all the criteria in every unit you are claiming.

You must meet all of the learning outcomes, assessment criteria and evidence requirements.

If you have not yet met all of the requirements, you and your assessor will return to the assessment planning cycle and decide how you can collect further evidence.
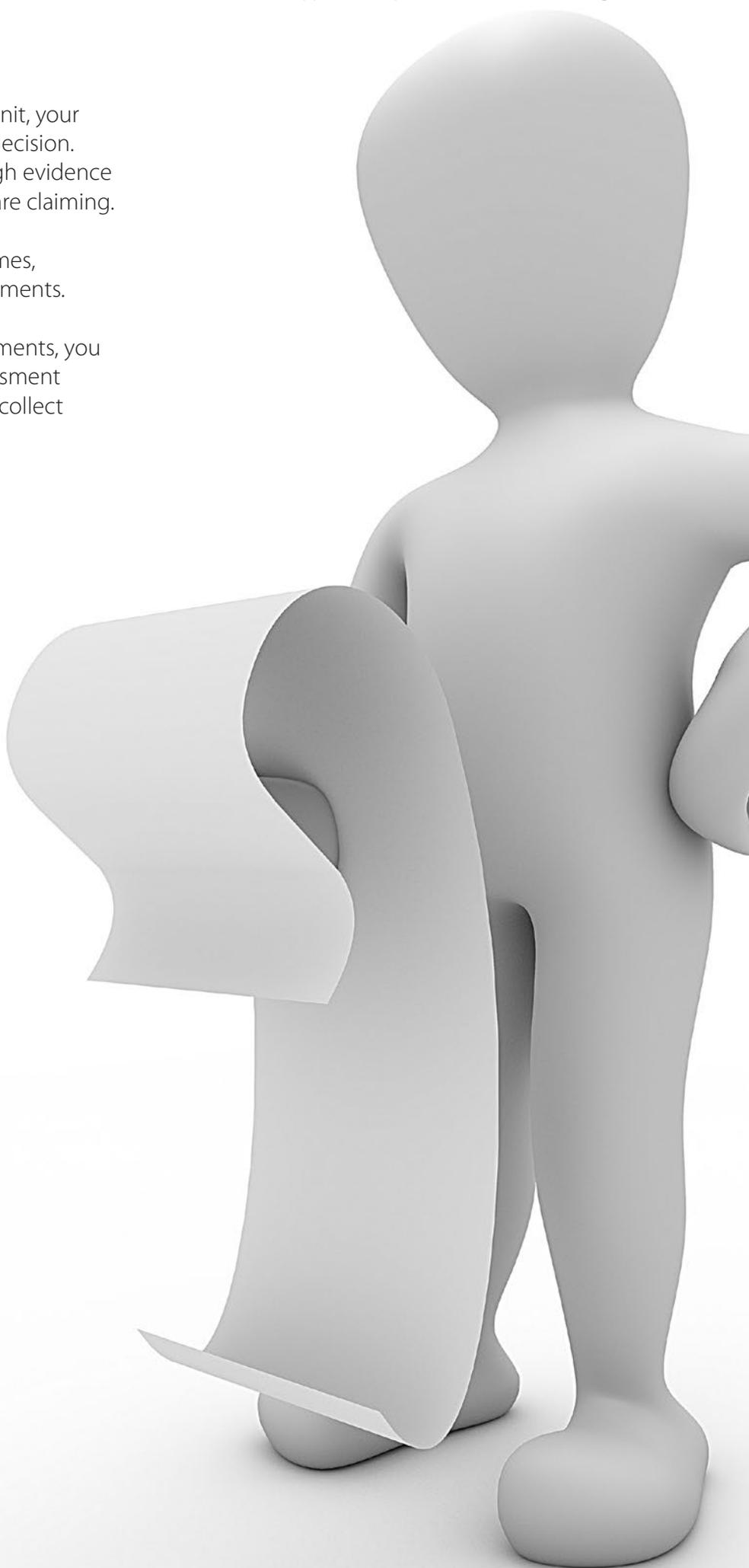
RECORDING EVIDENCE

It has been agreed that the following assessment methods are most suitable for this qualification:
- direct observation of practice by an assessor
- or by the expert witness for occupational specific units
- examination of evidence by an assessor
- questioning by an assessor
- inference of knowledge from direct observation
- professional discussion with an assessor.

In some situations, the assessor may speak to you to provide evidence of the your performance and knowledge (see Professional discussion).

DIRECT OBSERVATION OF PRACTICE

Direct observation is where the assessor watches what you are doing. They check your practice against the assessment criteria to determine if you are meeting the given standard.

You and your assessor should plan direct observations of practice together but it is the assessor's responsibility to record the observation properly.

After the observation has taken place, the assessor needs to record an assessment decision and the justification for the decision. The assessor must also give you feedback on your practice and the decision made.

EXAMINATION OF EVIDENCE

This is where the assessor reviews the evidence you have produced to see if it meets the assessment criteria.

Evidence can:
- be a reflection of how you carried out a process
- be the product of your work
- be a product relating to your competence.For example

The process that you carry out could be recorded in an observation or witness testimony. It is the assessor's responsibility to determine if the evidence you submit for assessment meets the requirements of the qualification.

Your work could be: notebook entries, completed forms, computer records, statements obtained, or reports completed. After the assessor has examined the evidence, the assessor must record an assessment decision and the justification for the decision. The assessor must also give you feedback on your evidence and the decision made.

QUESTIONING

Your assessor may question you or your witness for the assessment of these qualifications.

Questioning is normally an ongoing part of the assessment process, and is necessary to:
test your knowledge of facts and procedures
check if you understand principles and theories
collect information on the type and purpose of the processes you have gone through.

Your assessor will record assessment decisions after they have questioned you. They will record enough information to justify the decisions they make. This does not mean that assessors will record, word for word, the questions put to you and the answers you give. However, assessors will record enough information about what they asked and how you replied to allow the assessment to be verified.

Questioning witnesses is normally an ongoing part of validating written witness statements. However, questioning witnesses should not just be used for this purpose. Assessors should be able to speak to witnesses and record, in whatever way is suitable, the verbal statements of these witnesses. A record of verbal statement is a form of witness statement and could provide valuable evidence to confirm your performance over a period of time.

PROFESSIONAL DISCUSSION

Professional discussion is a structured, planned and in depth discussion recorded by your assessor. It allows you to demonstrate your skills, knowledge and understanding through discussing the evidence and showing how it meets the requirements of the qualification. The assessor will guide the discussion by using open questioning, active listening and knowledge of the requirements of the assessment criteria.

WITNESS STATEMENTS/TESTIMONIES

Witness testimonies can be used as evidence of your performance. Such testimonies can be made verbally to the assessor or can be written in a short note.
If a witness provides a written statement they need to include the following information:
- your name
- the date, time and venue of the activity carried out
- a description of the activities you performed
- the date of writing the testimony
- a description of the witness' relationship to you
- their signature and job title
- their contact details (such as telephone number).

It is not appropriate for witness testimonies to contain a list of the skills to which it relates. Witnesses must direct the information in their testimonies to describing what you did. The assessor will then judge whether the activities meet the requirements. It is not acceptable for you to produce written witness testimonies for witnesses to sign.

COPYRIGHT AND PLAGIARISM

Assessors must be confident that the work they mark is your own work. This does not mean that you must be supervised throughout the completion of all work but the assessor must exercise sufficient supervision, or introduce sufficient checks, to be in a position to judge the authenticity of your work.

Students must not plagiarise. Plagiarism is the submission of another's work as one's own and/ or failure to acknowledge the source correctly. Plagiarism is considered to be malpractice and could lead to you being disqualified. It is therefore important you understand that work you submit must be your own. You may refer to research, quotations or evidence but you must list your sources.

YOUR PORTFOLIO

We have looked at the different types of evidence you might produce for your qualification. In this section we will look at how you should record your evidence.

THE PORTFOLIO

A portfolio is a well-organised collection of your evidence for your qualification. It can be any shape or size, depending on the type of evidence you want to have assessed. It can be paper based or in an electronic format.

Your centre will help you to decide which will be the best option for you when you start your qualification.

The portfolio belongs to you and it is your responsibility to keep it safe and secure. If the portfolio is lost or damaged you may have to reproduce some evidence, which may delay your progress towards your qualification. Your centre may arrange to store the portfolio for you if you decide this is the best way to keep it safe.

Sometimes your centre will need to store the portfolio so it can be checked by the internal and external verifiers. When you have completed your portfolio, the centre will usually keep it until the external verifier has visited. The portfolio will then be returned to you.

BUILDING A PORTFOLIO

It is your responsibility to collect your evidence and build a portfolio. Although your centre will help you to do this, it is up to you to make sure you agree a way of organising evidence that you are happy with.

Your portfolio must show how the evidence you have collected covers the standards. It should be clearly logged and referenced, so that your assessor and verifiers can check it easily. You must show you have covered all of the learning outcomes and assessment criteria requirements in the qualification units.

We recommend that you use a simple referencing system for your evidence. You will often find that one piece of evidence can be used for more than one unit. In these cases, you should clearly cross-reference the evidence to the units and elements it covers, indicating specific assessment criteria.

There may be some evidence that you cannot put into your portfolio because it is too bulky, or because it is confidential. In these cases, you should make a note in your portfolio to explain where the evidence can be found.

PORTFOLIO CONTENTS

Whether you have an electronic or paper-based portfolio, it will need to contain the following information:

Introductory section:
- your personal and contact details
- your centre contact details
- the name and scheme code for your qualification
- your OCR candidate number (you get this when the centre registers you with OCR for this qualification)
- your curriculum vitae, job description or personal statement
- names and contact details of staff involved assessing and verifying your qualification
- names and contact details of witnesses.

Assessment section:
- a summary of your achievements
- an evidence log or locator to reference your evidence to the standards
- your assessment plans and reviews including
  - your assessment feedback
  - assessment decisions.

Evidence section:
- index of evidence

- your pieces of evidence
- evidence assessment records such as records of observations and professional discussions
- records of questions and your answers
- unit progress and sign off record.

RECORDING FORMS

There is a set of OCR Recording Forms you can use to help you build your portfolio. There are also completed examples to refer to, and blank forms which you can photocopy as required. Your centre has access to these on the OCR website.

MANAGEMENT AND LEADERSHIP JOB ROLES

The Level 3 qualifications are ideal for those with some management experience, or who have the ability and the opportunity to demonstrate recognisable management and leadership skills in any sector. They may already have a basic competence in a first level management role and require recognition for a wider range of abilities.

JOB ROLES INCLUDE:

- Section manager
- First line manager
- Assistant manager
- Trainee manager
- Senior supervisor

PROGRESSION

Apprentices, with support and opportunities in the workplace, can progress onto the Level 5 Higher Apprenticeship in Management. Alternatively, apprentices could progress on to a range of Management and other Professional Qualifications at level 4 and above.

With additional training, apprentices could progress to roles such as middle and senior manager, department manager or head of department.

Advanced Apprenticeship Level 3 Certificate in

Management

OCR Unit No	Sector Unit No	Unit Title	Unit Reference No (URN)	Credit value	Level
Group A Mandatory units					
1	A2	Manage own professional development within an organisation	L/600/9586	4	3
2	B5	Set objectives and provide support for team members	M/600/9600	5	3
3	D5	Plan, allocate and monitor work of a team	Y/600/9669	3	3

OCR Unit No	Sector Unit No	Unit Title	Unit Reference No (URN)	Credit value	Level
Group B Optional units					
4	A3	Develop, maintain and review personal networks	R/600/9587	4	4
5	B6	Provide leadership and direction for own area of responsibility	T/600/9601	5	4
6	B8b	Ensure compliance with legal, regulatory, ethical and social requirements	H/600/9609	5	4
7	B10b	Manage risk in own area of responsibility	L/600/9619	4	4
8	B10c	Review risk management processes in own area of responsibility	L/600/9622	3	4
9	A1	Manage personal development	F/600/9469	4	2
10	B11	Manage or support equality of opportunity, diversity and inclusion in own area of responsibility	M/600/9628	4	3
11	C1	Support team members in identifying, developing and implementing new ideas	L/600/9636	4	3
12	C6	Implement change in own area of responsibility	M/600/9659	6	4
13	D2a	Develop working relationships with colleagues and stakeholders	K/600/9661	4	4
14	D3a	Recruit staff in own area of responsibility	T/600/9663	4	5

15	D1	Develop working relationships with colleagues	H/600/9660	3	2
16	D6	Plan, allocate and monitor work in own area of responsibility	H/600/9674	5	4
17	D7	Support learning and development within own area of responsibility	M/600/9676	5	4
18	D8	Address performance problems affecting team members	F/600/9679	3	4
19	D9	Build, support and manage a team	F/600/9682	4	4
20	D10	Manage conflict in a team	R/600/9685	3	3
21	D11	Lead and manage meetings	Y/600/9685	4	3
22	D12	Participate in meetings	Y/600/9688	4	3
23	D13	Support individiuals to develop and take responsibility for their performance	D/600/9690	4	4
24	D14	Know how to follow disciplinary procedures	H/600/9691	4	4
25	D15	Managing grievance procedures	K/600/9692	3	4
26	D16	Support the management of redundancies in own area of responsibility	M/600/9693	3	4
27	E6	Develop and implement a risk assessment plan in own area of responsibility	L/600/9703	6	4
28	E8	Manage physical resources	K/600/9711	3	4
29	E9	Manage the environmental impact of work activities	M/600/9712	5	4
30	E10	Make effective decisions	F/600/9715	3	3
31	E12	Manage knowledge in own area of responsibility	T/600/9730	4	3
32	E11	Communicate information and knowledge	H/600/9724	3	2
33	E15	Procure supplies	L/600/9734	2	3
34	E16	Manage a tendering process	H/600/9738	4	4
35	F1	Plan and manage a project	J/600/9750	8	4
36	F4	Develop and implement marketing plans	K/600/9790	6	4
37	F9	Analyse the market in which your organisation operates	M/600/9791	5	4
38	F11	Manage the achievement of customer satisfaction	A/600/9793	5	4
39	F14	Prepare for and support quality audits	Y/600/9798	4	4
40	F17	Manage customer service in own area of responsibility	D/600/9804	4	3

To achieve this qualification, candidates must achieve a total of **25 credits** made up as follows:

14 credits from **Group A (mandatory)** all of which are at Level 3.
11 credits from the **Group B (optional)**.

UNIT A2 (L/600/9586)

MANAGE OWN PROFESSIONAL DEVELOPMENT WITHIN AN ORGANISATION

THIS IS A MANDATORY UNIT

The purpose of this unit is to provide learners with the knowledge and understanding of managing their own professional development within an organisation. The learner should be able to display that they can identify their own professional development needs to meet the demands of the organisation.

The unit is divided into four outcomes:

1. Be able to assess own career goals and personal development
2. Be able to set personal work objectives
3. Be able to produce a personal development plan
4. Be able to implement and monitor own personal development plan

UNIT A2 (L/600/9586)

MANAGE OWN PROFESSIONAL DEVELOPMENT WITHIN AN ORGANISATION

Learning Outcome 1 - Be able to assess own career goals and personal development

Assessment criteria. I can:

1.1   Identify own career and personal goals

1.2   Assess how own career goals effect work role and professional development

Learning outcome 2 - Be able to set personal work objectives

Assessment criteria. I can:

2.1   Agree SMART (Specific, Measureable, Achievable, Realistic and Time–Bound) personal work objectives in line with organisational objectives
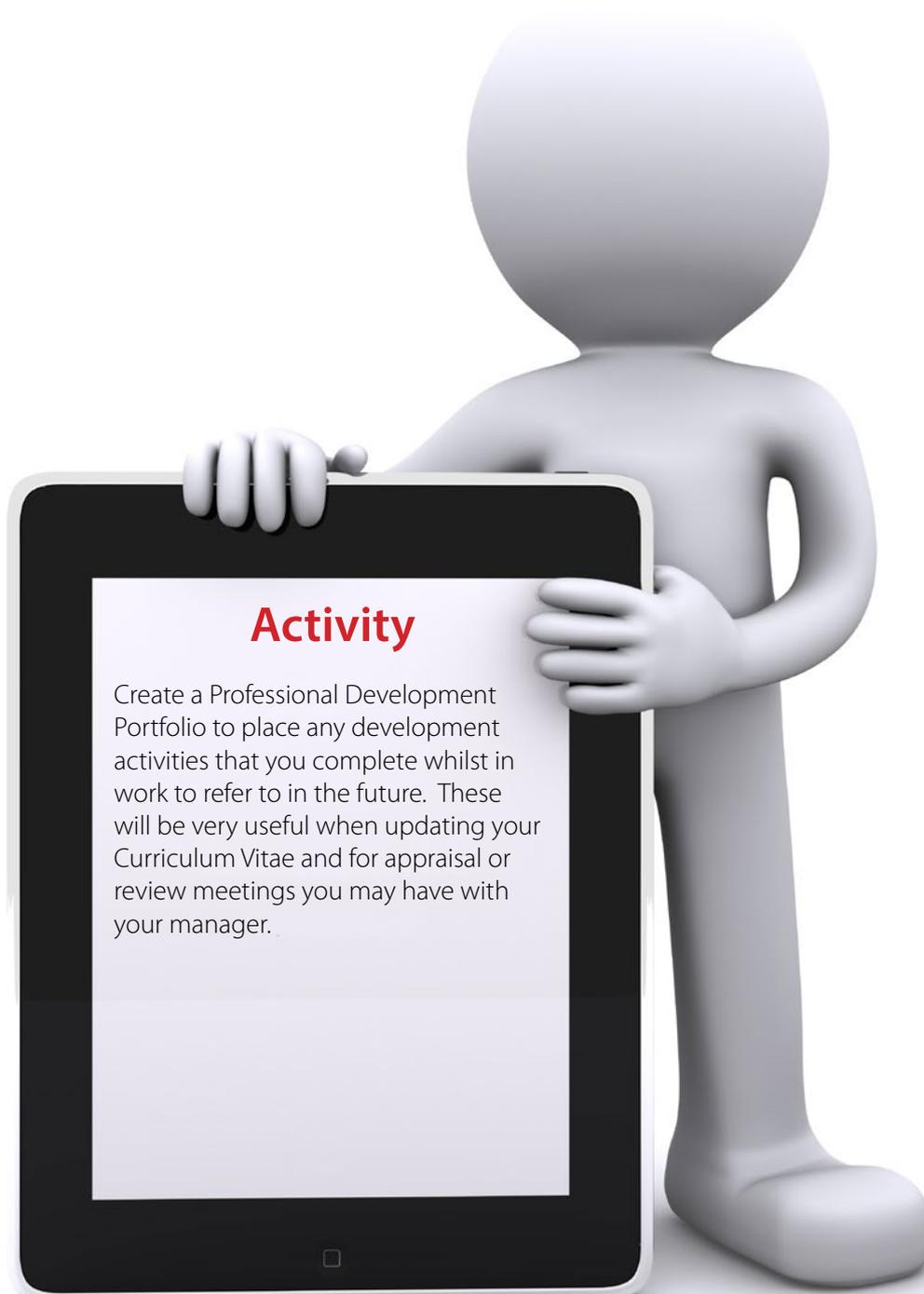
Activity

Create a Professional Development Portfolio to place any development activities that you complete whilst in work to refer to in the future. These will be very useful when updating your Curriculum Vitae and for appraisal or review meetings you may have with your manager.

Learning Outcome 3 - Be able to produce a personal development plan

Assessment criteria. I can:

3.1   Identify gaps between objectives set, own current knowledge and skills

3.2   Produce a development plan

Learning Outcome 4 - Be able to implement and monitor own personal development plan

Assessment criteria. I can:

4.1   Plan activities identified in own development plan

4.2   Explain how to monitor and review own personal development plan

Did you know?

You learn on the job every day. But are you learning what you really need to learn to develop your leadership and advance your career? It's up to you to make sure you're continually improving, growing and learning. It's up to you to take charge of your professional development. Learn, Grow, Lead: Stand Out In the Crowd.

Adapted from Learn, Grow, Lead: Stand Out In the Crowd, © Copyright Marcia Zidle. http://managementhelp.org/personaldevelopment/index.htm#grow

Key terms/words

Professional Development: evidence of you enhancing your skills and knowledge within your chosen career to give yourself opportunities to develop within the organisation.

Career Goals: ong-term achievements that you would like to complete over a period of time, for example, one to two years. This could be in the form of training, qualifications or career progression.

Objectives: short-term development opportunities that you can fulfil which will give you confidence to continue developing and inspire you to succeed even further.

Personal Development plan: a document that outlines specific opportunities for training, qualifications or career progression by detailing the skills and knowledge that you currently have with a movable time frame in order for you to progress to your career goals.

Points to note

Professional development is important in any organisation for both the individual (employee) as well as the business. It gives employees the opportunities to take on new challenges in many different forms and to develop them over a period of time. Employees' skills and knowledge will be enhanced which will be beneficial to the organisation.
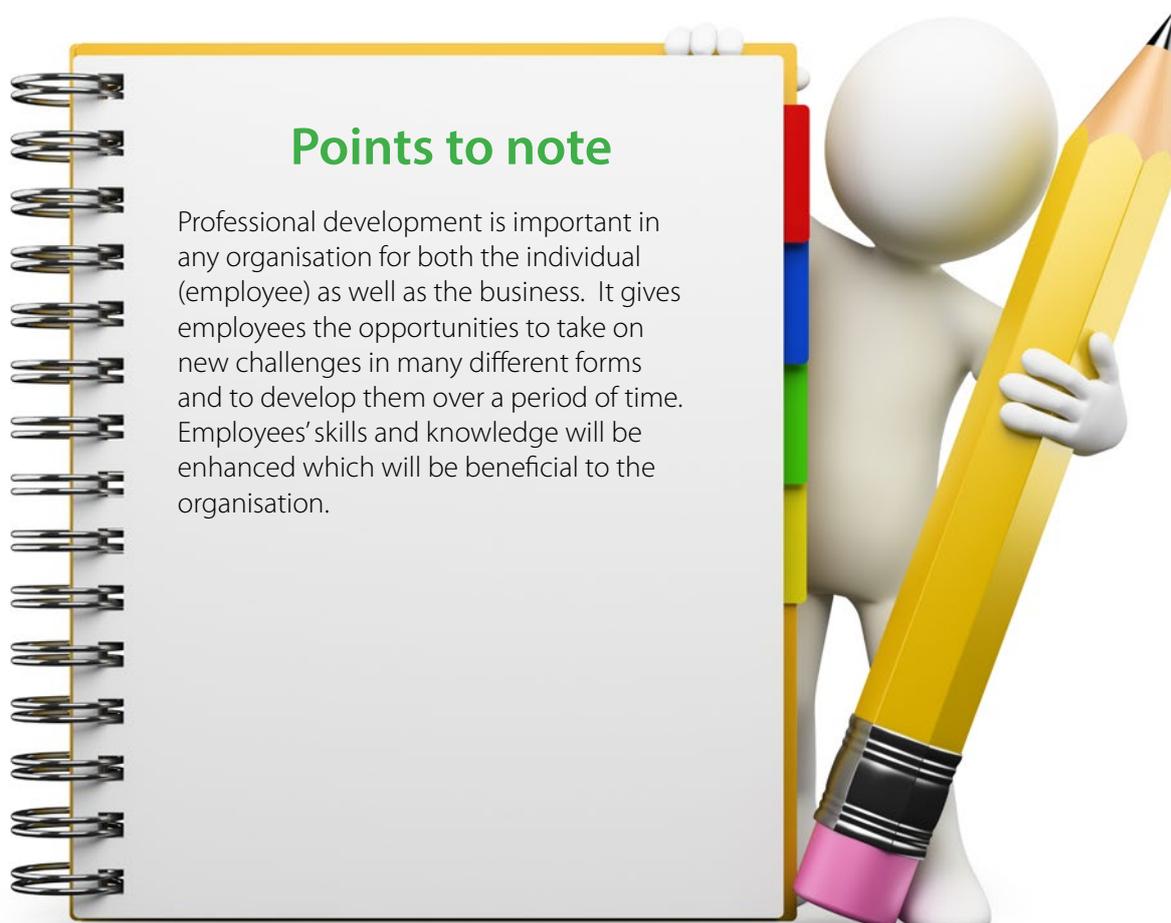
UNIT B5 (M/600/9600)

SET OBJECTIVES AND PROVIDE SUPPORT FOR TEAM MEMBERS

THIS IS A MANDATORY UNIT

This purpose of this unit is to provide learners with the knowledge and understanding of methods to provide direction to a team. It covers communication needs to set objectives and provide support.

The unit is divided into four outcomes:

1. Be able to communicate a team's purpose and objectives to the team members
2. Be able to develop a plan with team members showing how team objectives will be met
3. Be able to support team members identifying opportunities and providing support
4. Be able to monitor and evaluate progress and recognise individual and team achievement.

UNIT B5 (M/600/9600)

SET OBJECTIVES AND PROVIDE SUPPORT FOR TEAM MEMBERS

Learning Outcome 1 - Be able to communicate a team's purpose and objectives to the team members

Assessment criteria. I can:

1.1   Describe the purpose of a team

1.2   Set team objectives with its members which are SMART (Specific, Measurable, Achievable, Realistic and Time-Bound)

1.3   Communicate the team's purpose and objectives to its members

Learning outcome 2 - Be able to develop a plan with team members showing how team objectives will be met

Assessment criteria. I can:

2.1   Discuss with team members how team objectives will be met

2.2   Ensure team members participate in the planning process and think creatively

2.3   Develop plans to meet team objectives

2.4   Set SMART personal work objectives with team members

Activity

Look at the objectives you have agreed with your own team and check to see if they each fully meet SMART criteria; if not, rewrite them in such a way that each objective is Specific, Measurable , Achievable, Realistic and Time-bound.

Learning Outcome 3 - Be able to support team members identifying opportunities and providing support

Assessment criteria. I can:

3.1   Identify opportunities and difficulties faced by team members

3.2   Discuss identified opportunities and difficulties with team members

3.3   Provide advice and support to team members to overcome identified difficulties and challenges

3.4   Provide advice and support to team members to make the most of identified opportunities

Learning Outcome 4 - Be able to monitor and evaluate progress and recognise individual and team achivement

Assessment criteria. I can:

4.1   Monitor and evaluate individual and team activities and progress

4.2   Provide recognition when individual and team objectives have been achieved

Did you know?

Leadership is sometimes defined as "getting other people to do what you want to do because they want to do it." John Adair (author of 'Effective Leadership') does not agree. He says: 'If it is your task, why should anyone help you to achieve it? It has to be a common task, one which in the group can share because they see that it has value for the organisation and directly, or indirectly, for themselves.'

The 'task' is a simple way of defining what the team exists to do: its common purpose. You need to make sure that every member of the team shares an understanding of the actual purpose of the team and its objectives, believes in the outcome and sees the outcome as achievable.

Key terms/words

Objectives: are a statement that tells the individual or team what they are required to do, why they are being asked to do it and how their success will be measured. They provide a focus against which a team or individual's performance can be reviewed and assessed.

Personal work objectives: should recognise the skills, knowledge and attributes of the individual whilst also providing development opportunities. It may be useful when setting individual work objectives with a team member to give them a copy of their Job Description and the outcomes of their last performance appraisal – this will help you both to see what tasks are outside the job scope and what they are simply not capable of doing. Following discussion with you, each member of the team should have a plan which outlines their personal work objectives, role and responsibilities, and know how these fit in with the rest of the team.

Support: should be provided to both individuals and the team as a whole. This may take many forms but, as a minimum, everyone needs to know on a regular basis how they are doing, measured against their objectives; it may involve problem-solving or managing conflict within the team. Providing support may also include identifying when individuals are in need of extra help such as training or mentoring, or are dealing with personal issues that are impacting on their performance, and helping them to identify potential solutions.

Points to note

Over-ambitious objectives can be de-motivating, raising expectations that cannot be met; they should therefore reflect the resources and support available to allow the team or individual to achieve their objective(s).
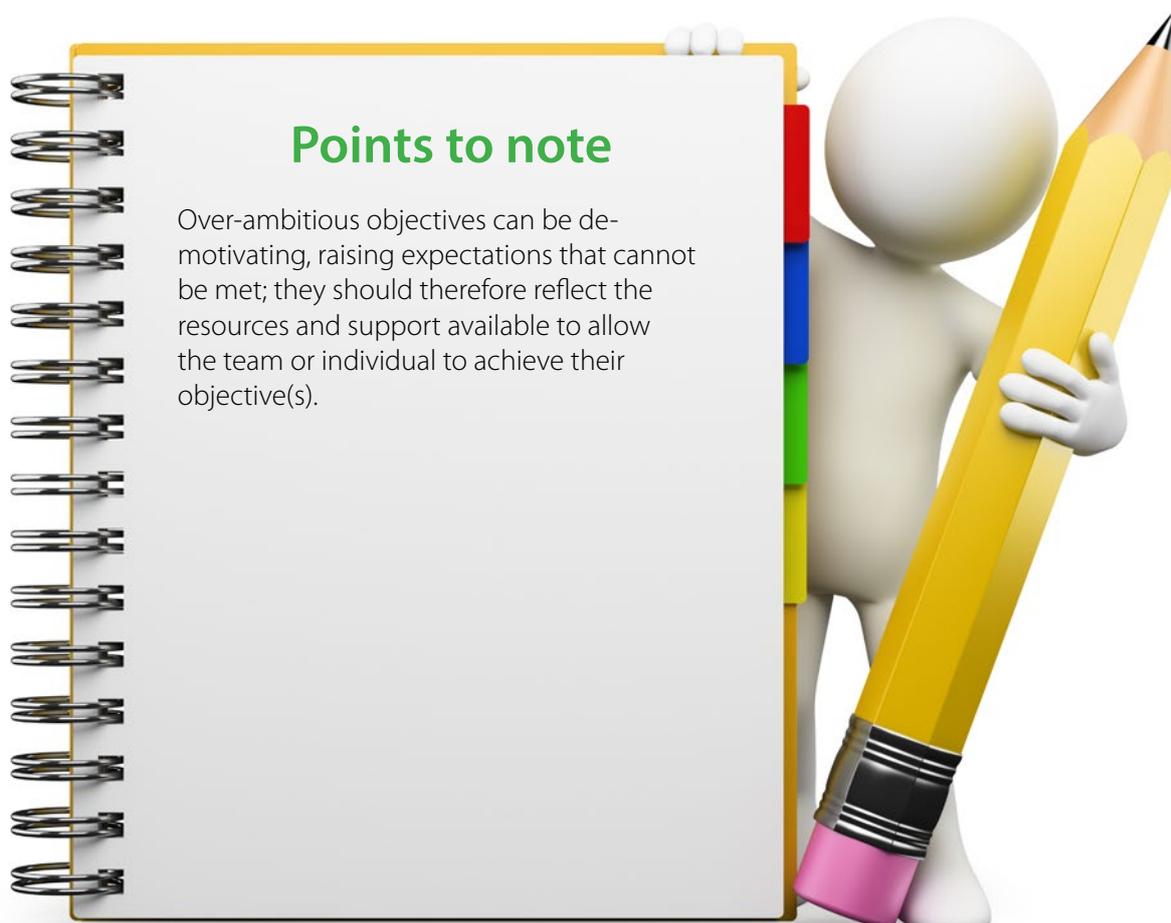
UNIT D5 (Y/600/9669)

PLAN, ALLOCATE AND MONITOR WORK OF A TEAM

THIS IS A MANDATORY UNIT

This unit helps learners to plan and allocate the work of a team. It also covers how to support, monitor and improve team performance.

The unit is divided into five outcomes:

1. Be able to plan work for a team
2. Be able to allocate work across a team
3. Be able to manage team members to achieve team objectives
4. Be able to monitor and evaluate the performance of team members
5. Be able to improve the performance of a team.
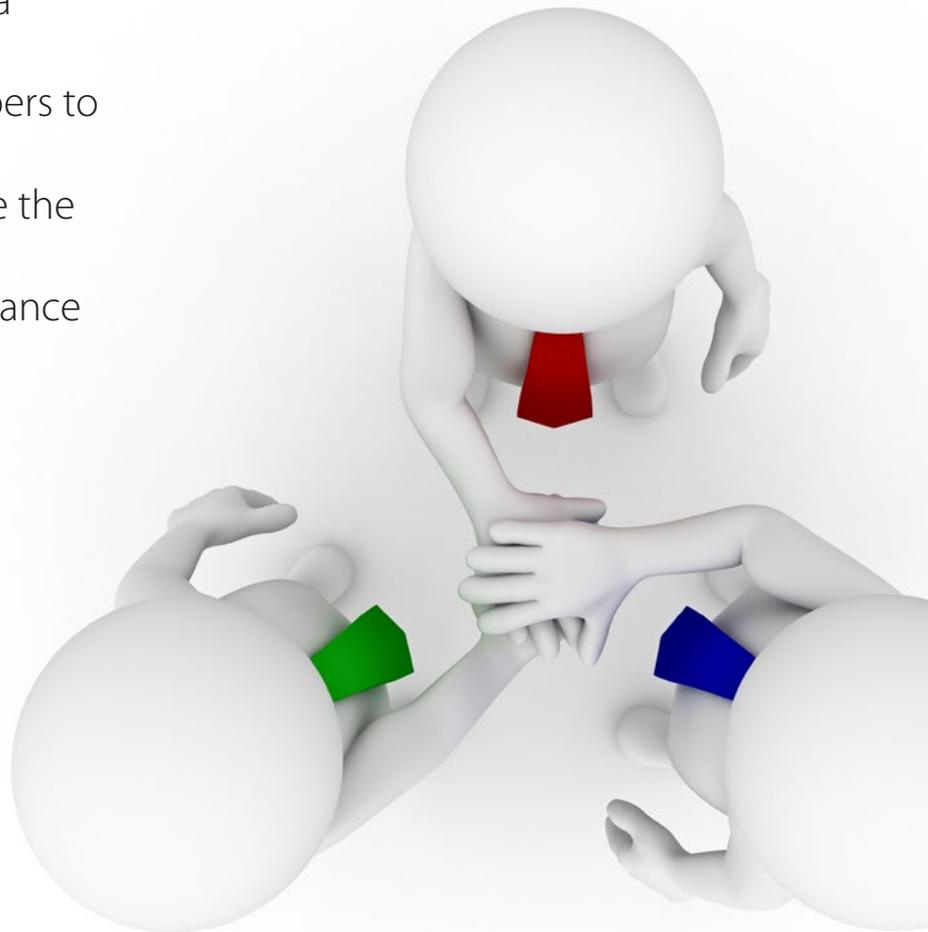
UNIT D5 (Y/600/9669)

PLAN, ALLOCATE AND MONITOR WORK OF A TEAM

Learning Outcome 1 - Be able to plan work for a team

Assessment criteria. I can:

1.1 Agree team objectives with own manager

1.2 Develop a plan for a team to meet agreed objectives, taking into account capacity and capabilities of the team

Learning outcome 2 - Be able to allocate work across a team

Assessment criteria. I can:

2.1 Discuss team plans with a team

2.2 Agree work allocation and SMART (Specific, Measureable, Achievable, Realistic and Time-bound) objectives with team members

2.3 Agree standard of work required by team

Activity

Read about Maslow's Motivation Pyramid and Herzberg's Theory of Motivation. Identify what rewards and benefits motivate each member of your team and then review the objectives you set each of them and consider whether they appeal to these rewards and benefits, and how you might consider amending them to do so.
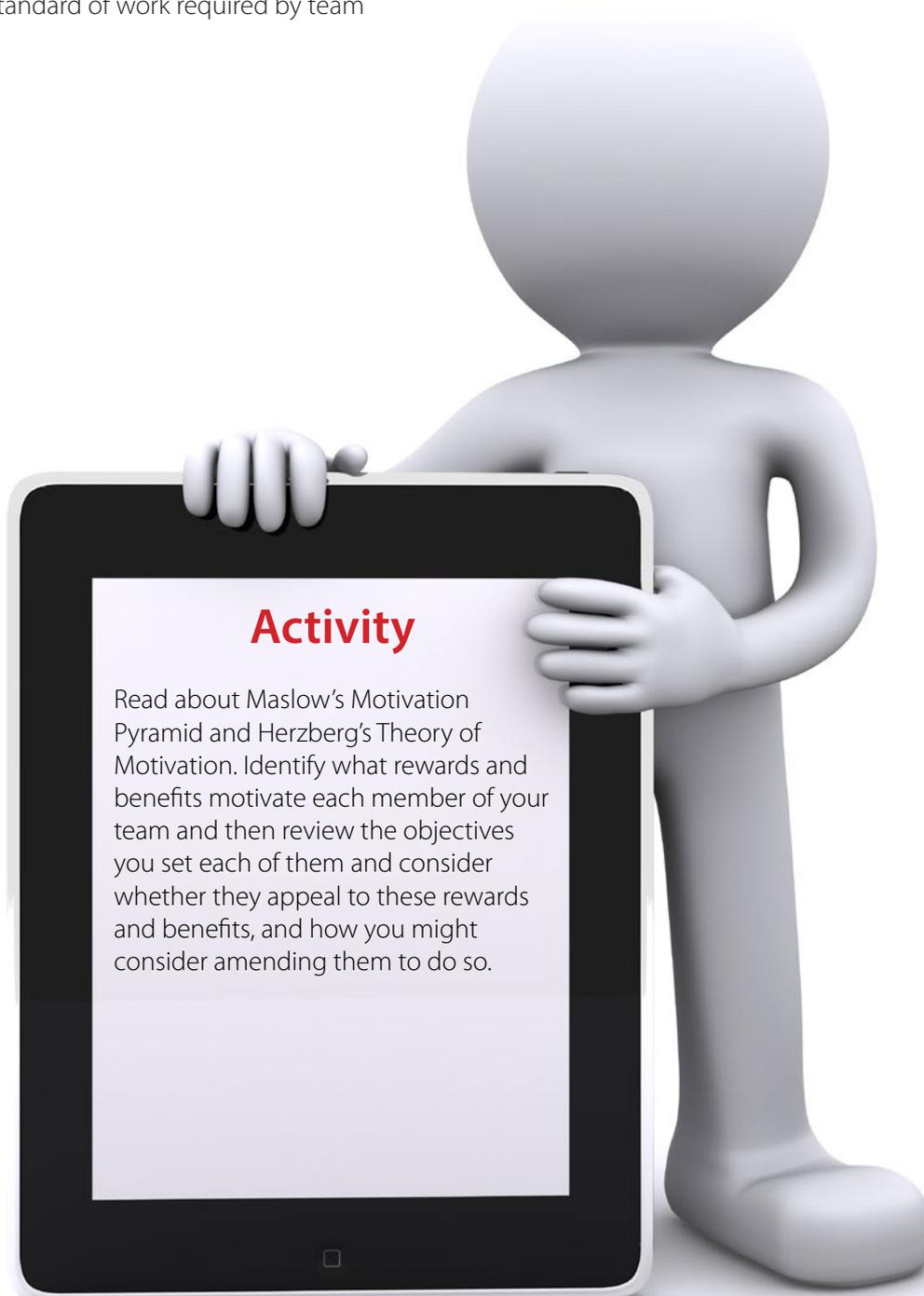
Learning Outcome 3 - Be able to manage team members to achieve team objectives

Assessment criteria. I can:

3.1   Support all team members in order to achieve team objectives

Learning Outcome 4 - Be able to monitor and evaluate the performance of team members

Assessment criteria. I can:

4.1   Assess team member's work against agreed standards and objectives

4.2   Identify and monitor conflict within a team

4.3   Identify causes for team members not meeting team objectives

Learning Outcome 5 - Be able to improve the performance of a team

Assessment criteria. I can:

5.1   Identify ways of improving team performance

5.2   Provide constructive feedback to team members to improve their performance

5.3   Implement identified ways of improving team performance

Did you know?

"Empowerment is the ability to cultivate a clear and guiding sense of individual worth, responsibility and commitment as opposed to a dependency culture where the individual is unable to function without a manager directing proceedings." (Thomas 1977). An empowered team is one in which the team leader delegates tasks effectively and fairly, providing opportunities for coaching and skills development. It can strengthen commitment and motivation.

Key terms/words

Agree team objectives: these may include, for example, targets for production and quality of output of the product or service, working within a budget, training in new legislation or processes, or levels of attendance or time-keeping, or reduction in number of faults, returns or complaints. You may need to explain, with evidence, why your team cannot, at present, meet your manager's expectations and be prepared to negotiate new objectives or request further resources in order to meet the objectives.

Capacity and capabilities: these will include knowing how much work can be reasonably expected of your team over a given period at present, and the current and potential capability of each individual team member.

Monitor and evaluate performance: requires you to have communicated effectively with your team the objectives and standards you expect of them and, with them, to assess progress. Encouraging the team to take responsibility for this evaluation process makes it much more a part of everyday work and less of a management control exercise. Managers and teams need to agree what needs to be reviewed and evaluated, how it is to be done and how it can help the team to be more successful.

Improve performance of a team: this will require you to know what is preventing the team, or individuals or groups within the team, from meeting or exceeding the performance standards required. This may include problems with organisational systems, the resources available, lack of skills or knowledge, poor attitudes, or conflict. You will then need to identify what can be done to improve the situation.

Points to note

You are responsible to your organisation for your team's performance. You need to understand what motivates the individuals within the team and how you can build on this to improve overall team performance and empower your team.
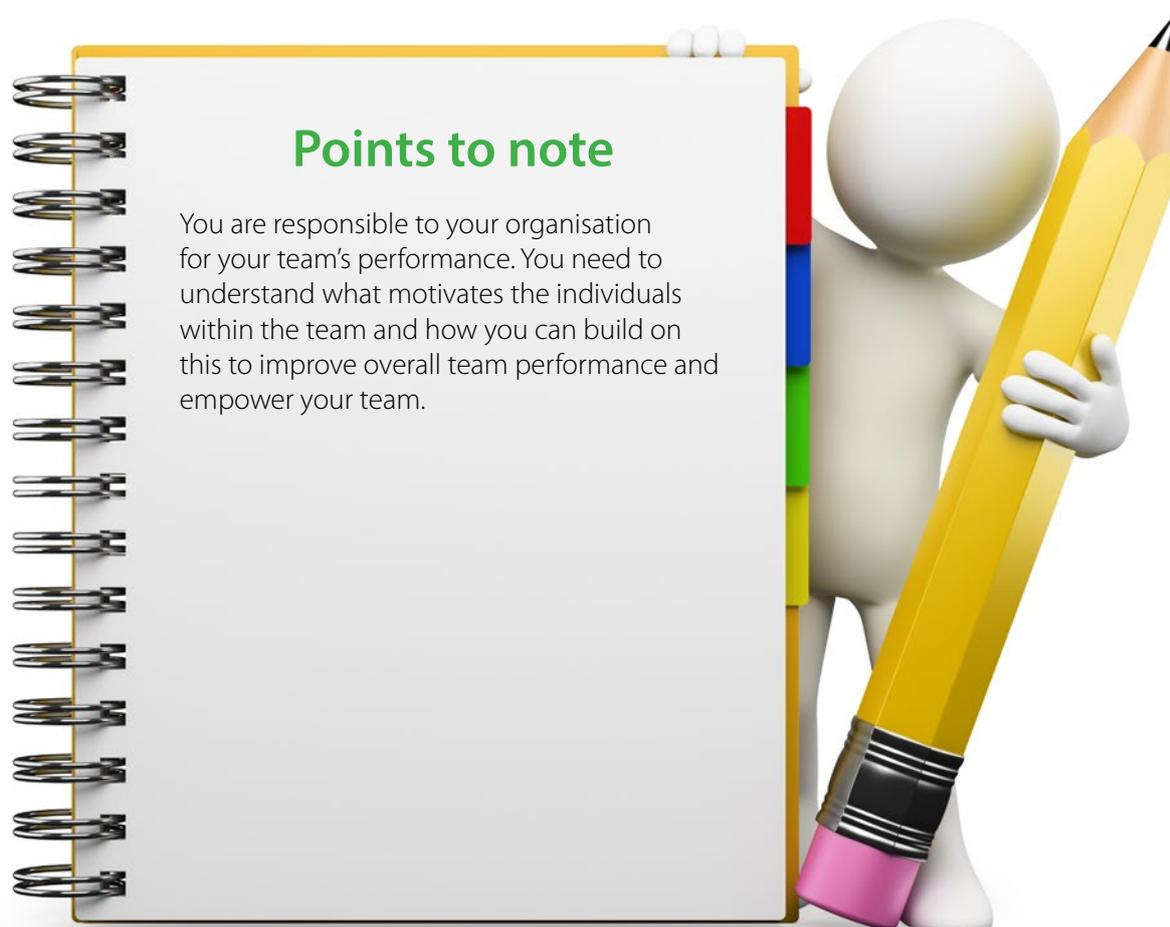
UNIT A3 (R/600/9587)

DEVELOP, MAINTAIN AND REVIEW PERSONAL NETWORKS

THIS IS AN OPTIONAL UNIT

This unit aims to equip the candidate with the ability to create, review, develop and maintain personal networks. The candidate is able to develop networks to support both current and future work, with an understanding of the need that exchanging information and other linked resources has mutual benefit.

The unit is divided into three outcomes:

1. Understand the benefits of networking and the need for data privacy
2. Be able to develop a personal network of contacts
3. Be able to review networking relationships

UNIT A3 (D/600/9587)

DEVELOP, MAINTAIN AND REVIEW PERSONAL NETWORKS

Learning Outcome 1 - Understand the benefits of networking and the need for data privacy

Assessment criteria. I can:

1.1   Evaluate the benefits of networking with individuals and organisations

1.2   Identify individuals and organisations that would provide benefits to own organisation and networks

1.3   Explain the need for confidentiality with networking contacts

Learning outcome 2 - Be able to develop a personal network of contacts

Assessment criteria. I can:

2.1   Develop networks that will provide personal and organisational benefit

2.2   Develop guidelines for working with networks in line with organisational procedures

Activity

Devise a table of contacts that you currently have in your workplace and outside of work. From your list, consider if any of the contacts could potentially be a source of useful information or potential custom to your organisation in terms of networking in the future.
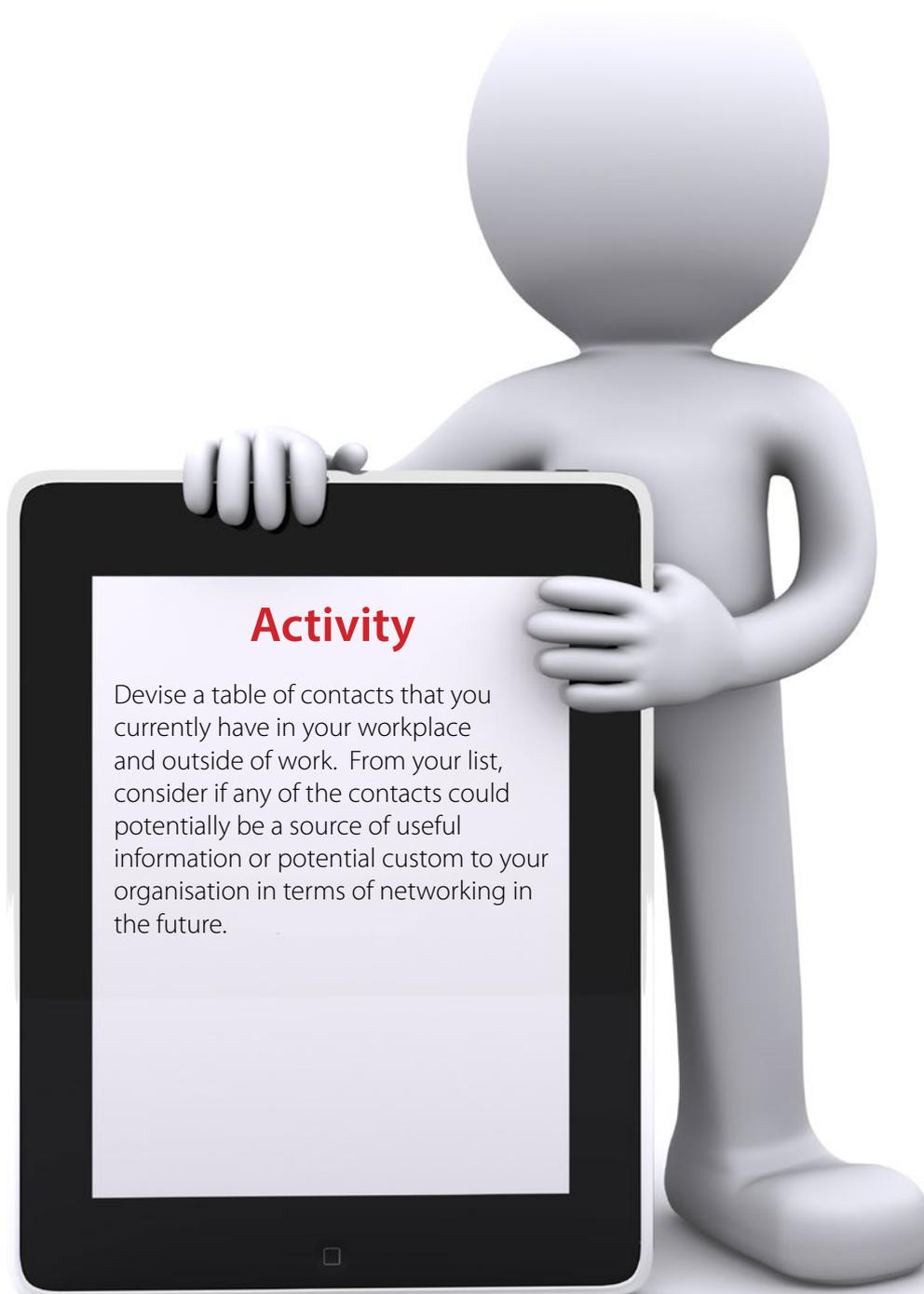
Learning Outcome 3 - Be able to review networking relationships

Assessment criteria. I can:

3.1 Assess the value own current personal network

3.2 Evaluate own experience with existing contacts and use these to inform future actions

Did you know?

Networking works because other networkers will share with you what works. They will share with you the tips, techniques and protocol of their particular organization to ensure that your membership gets off on the right foot and begins to work as soon as possible. Networking effectively creates third-party synergistic opportunities that will expand the number of professional contacts who refer their clients, patients, customers, associates, friends, and relatives to you.

Adapted from Networking Facts, http://www.jigyo.com/ thenetworkersplace/networkingFacts.ht

Key terms/words

Networking: organisations rely on good communication with other businesses in order to gain knowledge and contacts within the organisations. This can be mutually beneficial in terms of business and potential customers.

Data Privacy: being aware of confidentially in the workplace is key in any organisation. Staff will know the types of data that are private to the business and these should not be divulged at any time.

Points to note

Networking works because other networkers will share with you what works. They will share with you the tips, techniques and protocol of their particular organization to ensure that your membership gets off on the right foot and begins to work as soon as possible. Networking effectively creates third-party synergistic opportunities that will expand the number of professional contacts who refer their clients, patients, customers, associates, friends, and relatives to you.

Adapted from Networking Facts, http://www.jigyo.com/thenetworkersplace/networkingFacts.ht

UNIT B6 (T/600/9601)

PROVIDE LEADERSHIP AND DIRECTION FOR OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit aims to provide the candidate with the ability to recognise own strengths within own area of responsibility and to use these to provide leadership to the team in achieving required goals. The candidate will also gather appropriate feedback from team members which, together with own reflection on leadership of the team, will lead to enhancement in the performance of the team and the individual.

The unit is divided into four outcomes:

1. Be able to lead in own area of responsibility
2. Be able to provide direction and set objectives in own area of responsibility
3. Be able to communicate the direction for own area of responsibility and collect feedback to inform improvement.
4. Be able to assess own leadership performance
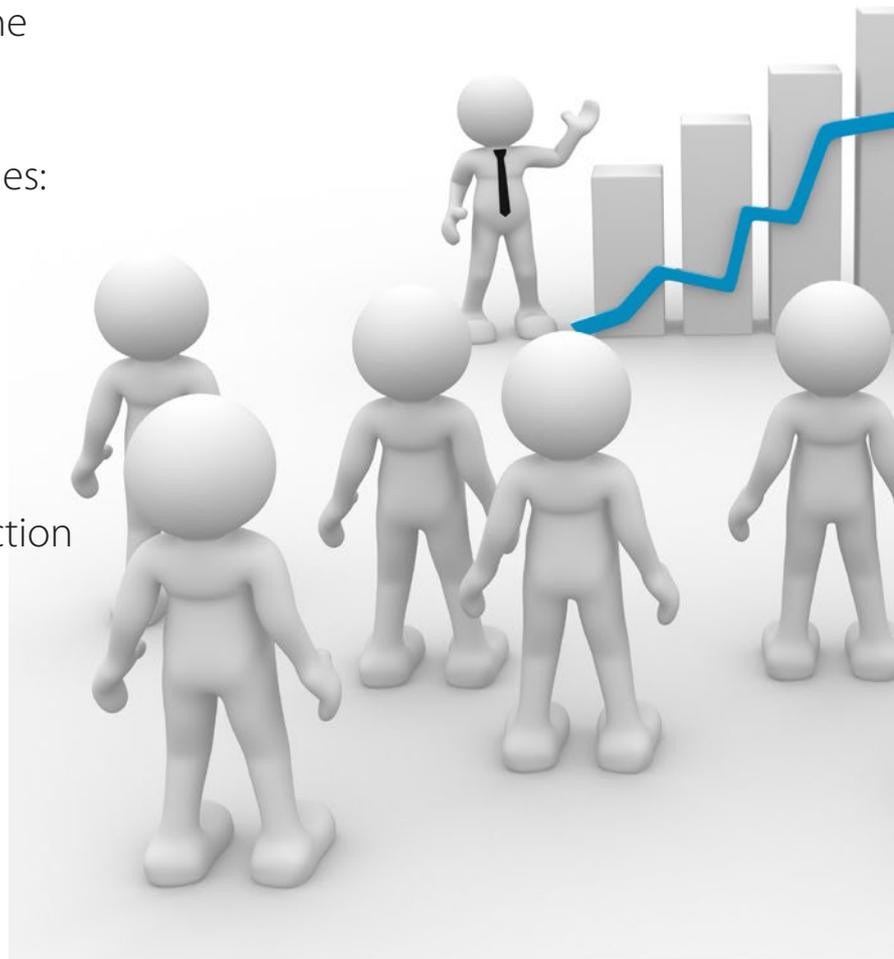
UNIT B6 (T/600/9601)

PROVIDE LEADERSHIP AND DIRECTION FOR OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Be able to lead in own area of responsibility

Assessment criteria. I can:

1.1   Identify own strengths and ability to lead in a leadership role

1.2   Evaluate strengths within own area of responsibility

Learning outcome 2 - Be able to provide direction and set objectives in own area of responsibility

Assessment criteria. I can:

2.1   Outline direction for own area of responsibility

2.2   Implement objectives with colleagues that align with those of the organisation
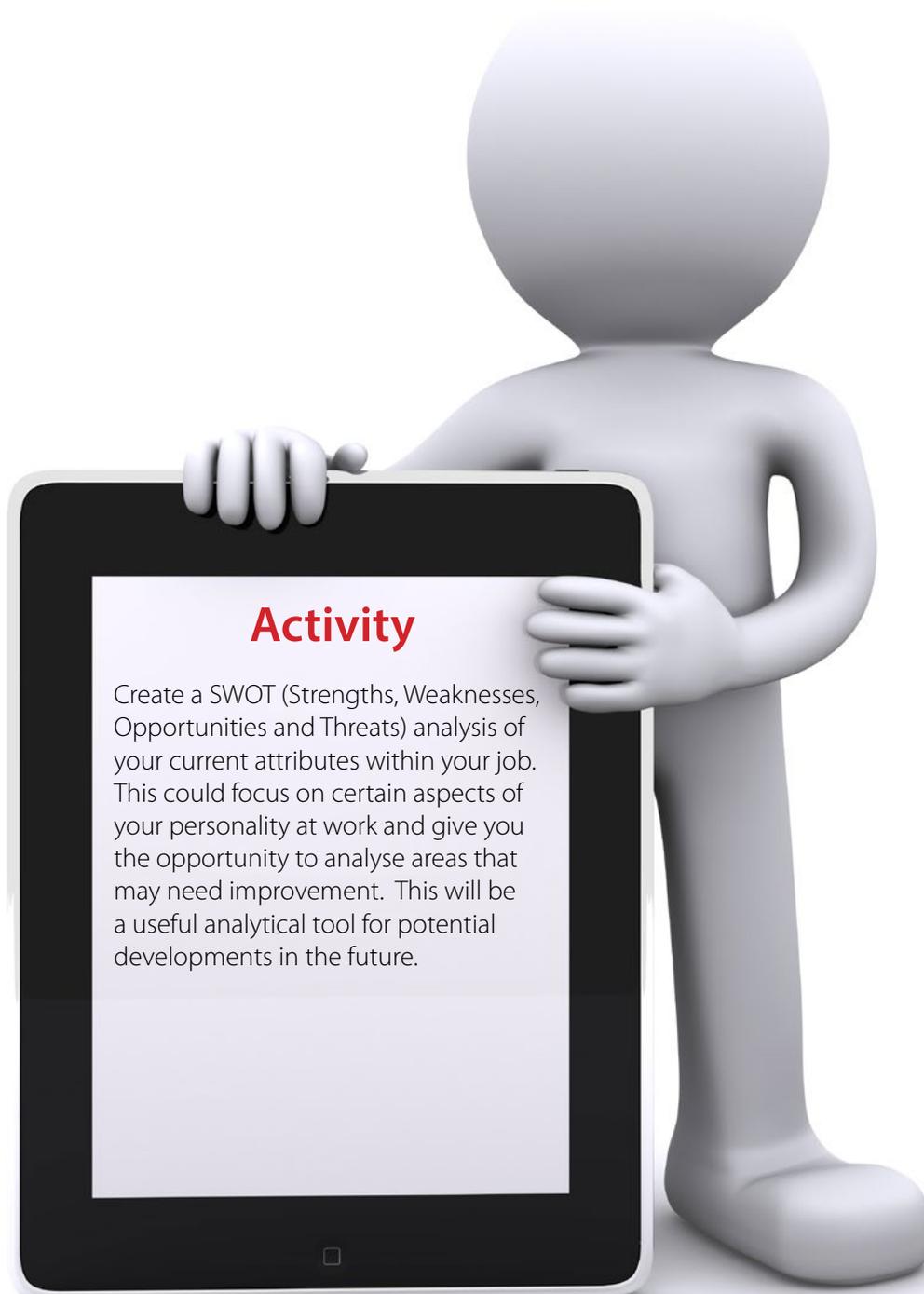
Activity

Create a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of your current attributes within your job. This could focus on certain aspects of your personality at work and give you the opportunity to analyse areas that may need improvement. This will be a useful analytical tool for potential developments in the future.

Learning outcome 3 - Be able to communicate the direction for own area of responsibility and collect feedback to inform improvement

Assessment criteria. I can:

3.1   Communicate the agreed direction to individuals within own area of responsibility

3.2   Collect feedback to inform improvement

Learning outcome 4 - Be able to assess own leadership performance

Assessment criteria. I can:

4.1   Assess feedback on own leadership performance

4.2   Evaluate own leadership performance

Did you know?

Leadership begins with learning how to manage your own personality, temperament and time. Learn to lead yourself before you try to lead others.
Adapted from Facts on Leadership, © Copyright Susan Faulk.
 http://www.livestrong.com/article/2965-facts-leadership/

Key terms/words

Responsibility: when leading a team of individuals it is important that all aspects of a project are considered. As a leader you will take the lead and guide the group to a positive conclusion. If at times the experience is negative then you will use your skills and be accountable for mistakes made, ensuring that the team's morale is still productive.

Direction: often a group of people will need one member to take the lead and 'show the way' to produce the end project. This means that one member could offer a solution, giving specific instructions to individuals so the task is completed to a given deadline.

Leadership performance: analysis of a group leader can take many forms – the most common being an evaluation sheet produced by management for staff to make constructive comments that the leader can then put into practice to enhance their skills.

Organisational goals: achievements that the business will want to complete over a period of time which employees will strive to achieve for the good of the organisation. This will create a sense of purpose for all staff.
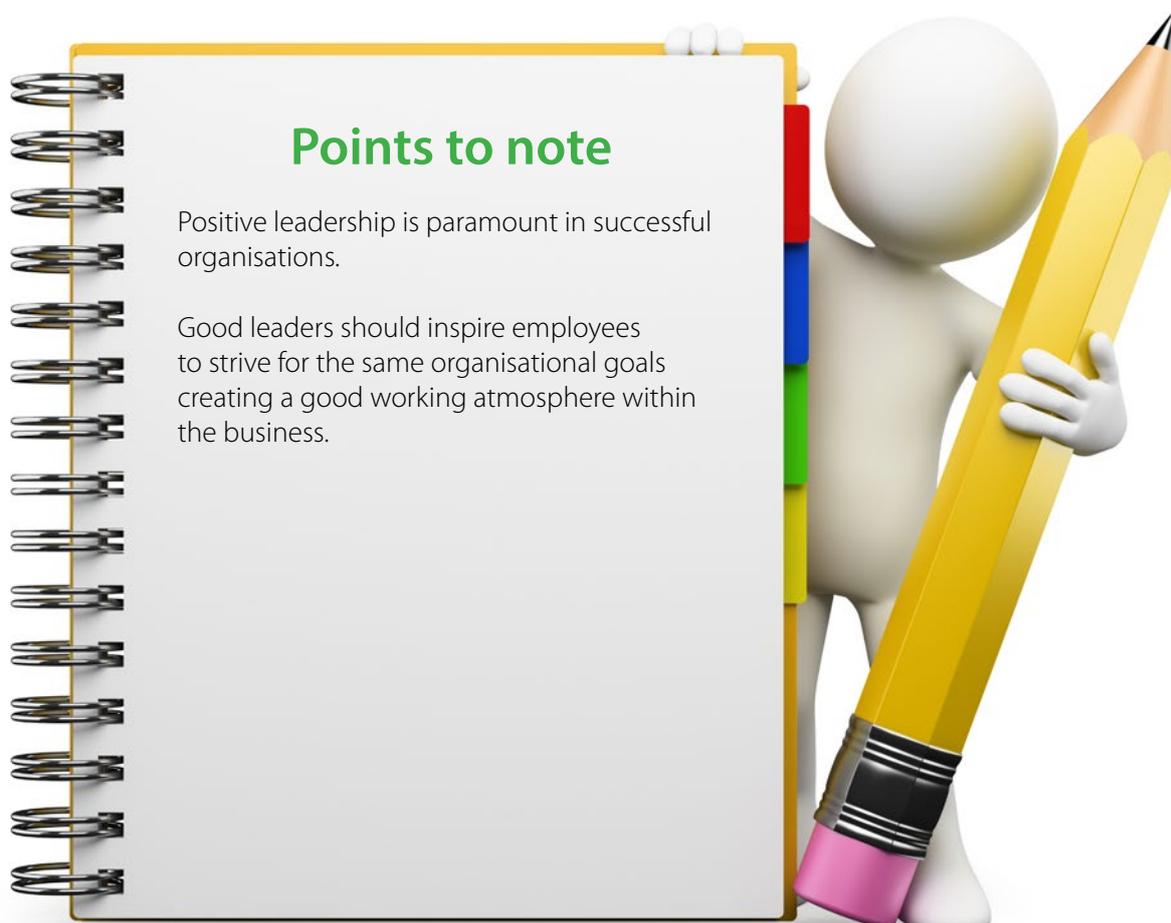
Points to note

Positive leadership is paramount in successful organisations.

Good leaders should inspire employees to strive for the same organisational goals creating a good working atmosphere within the business.

UNIT B8B (H/600/9609)

ENSURE COMPLIANCE WITH LEGAL, REGULATORY, ETHICAL AND SOCIAL REQUIREMENTS

THIS IS AN OPTIONAL UNIT

This unit aims to provide the candidate with the knowledge and skills to ensure that they comply with all regulatory, statutory, ethical and social requirements relating to their area of responsibility. It will also enable them to recognise failure or omission in compliance within their own area and to make appropriate recommendations to correct such problems.

The unit is divided into two outcomes:

1. Be able to monitor the operational compliance of procedures in meeting legal, regulatory, ethical and social requirements
2. Be able to identify and make recommendations on areas of non-compliance with procedures for legal, regulatory, ethical and social requirements relating to own area of responsibility

UNIT B8B (H/600/9609)

ENSURE COMPLIANCE WITH LEGAL, REGULATORY, ETHICAL AND SOCIAL REQUIREMENTS

Learning Outcome 1 - Be able to monitor the operational compliance of procedures in meeting legal, regulatory, ethical and social requirements

Assessment criteria. I can:

1.1   Monitor the operational compliance of procedures in meeting legal, regulatory, ethical and social requirements

Activity

Form a focus group with fellow colleagues to identify and discuss certain areas of compliance and non-compliance issues within the workplace.
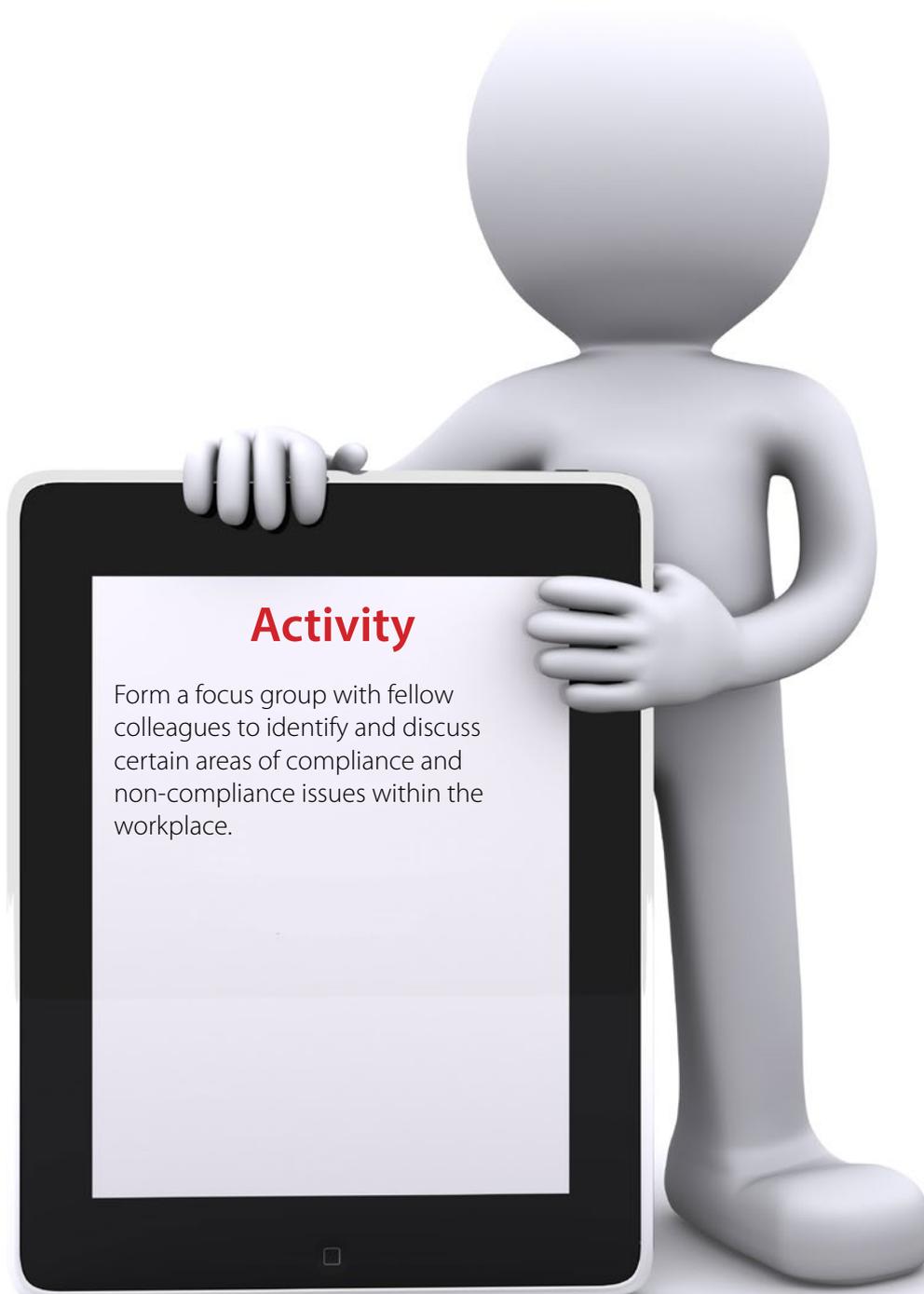
Learning outcome 2 - Be able to identify and make recommendations on areas of non-compliance with procedures for legal, regulatory, ethical and social requirements relating to own area of responsibility

Assessment criteria. I can:

2.1   Identify areas of non-compliance with legal, regulatory, ethical and social procedures

2.2   Examine reasons for non-compliance with procedures

2.3   Make recommendations for corrections to ensure compliance with procedures

Did you know?

Organisations must show that they act responsibly in relation to their staff, customers, investors and the communities in which they work. All types of organisations must obey the law in key areas such as health and safety, employment, finance and company law. Many organisations also have to work within specific regulations for their industry and ethical frameworks. Organisations who want to maintain a good reputation also have to take account of the views of people in their communities on a whole range of issues, such as the environment and other ways in which the organisation affects people's quality of life.

Adapted from Skills for Justice Page 1 National Occupational Standards for Managing Justice Sector Services.

http://www.sqa.org.uk/files_ccc/
MLB8EnsureCompliancewithLegalRegulatoryEthicaland
Socialrequirements.pdf

Key terms/words

Compliance: businesses should act in an appropriate manner when dealing with specific requirements from individuals or groups.

Making recommendations: recommendations can be a tool to show initiative in a given business situation and a way to show management your potential.

Social requirements: considering employees at all levels in decision making is important to show that you are aware. Speaking to people to gain thoughts and opinions of a proposal would enable a transition to a new procedure to run with less animosity.
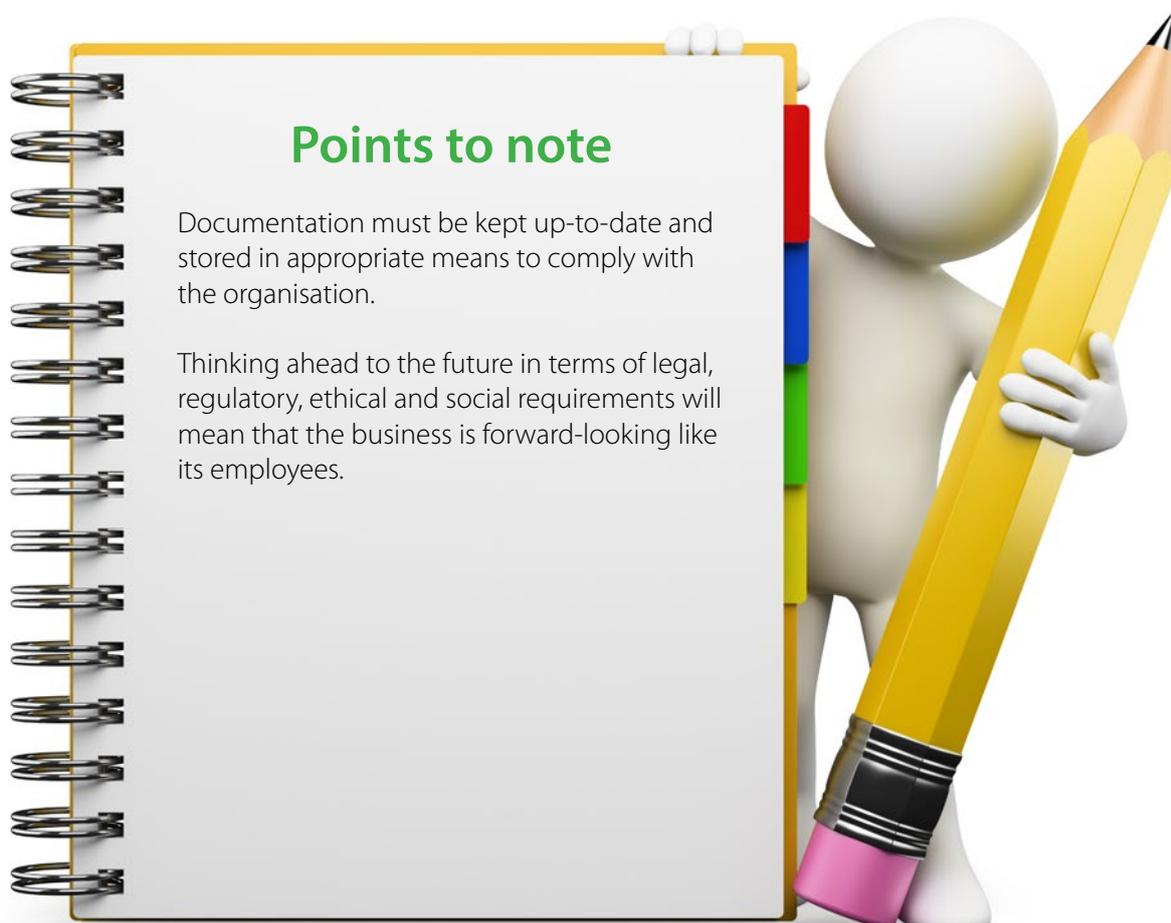
Points to note

Documentation must be kept up-to-date and stored in appropriate means to comply with the organisation.

Thinking ahead to the future in terms of legal, regulatory, ethical and social requirements will mean that the business is forward-looking like its employees.

UNIT B10B (L/600/9619)

MANAGE RISK IN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit will enable candidates to recognise risks and potential risks within their own area of responsibility, assess the type, impact and probability of the risk and produce an action plan or equivalent to manage the risk. The unit will also ensure that candidates are able to allocate responsibility for specific risk management and provide appropriate information to stakeholders.

The unit is divided into three outcomes:

1. Be able to undertake a risk evaluation for current and planned activities within own area of responsibility
2. Be able to minimise the impact and likelihood of potential risks occurring in own area of responsibility
3. Be able to communicate identified risks

UNIT B10B (L/600/9619)

MANAGE RISK IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 -Be able to undertake a risk evaluation for current and planned activities within own area of responsibility

Assessment criteria. I can:

1.1   Identify potential risks in current and planned activities within own area of responsibility

1.2   Assess the nature of identified risks and potential consequences

1.3   Evaluate the probability of identified risks occurring

Learning outcome 2 - Be able to minimise the impact and likelihood of potential risks occurring in own area of responsibility

Assessment criteria. I can:

2.1   Identify ways and means of minimising the impact and likelihood of potential risks

2.2   Allocate responsibility for risk management to relevant individuals within own area of responsibility

Activity

Look around quickly at the workplace that you work in and see if you can identify 5 risks within a few minutes. Consider how these could be prevented by individuals or a group.
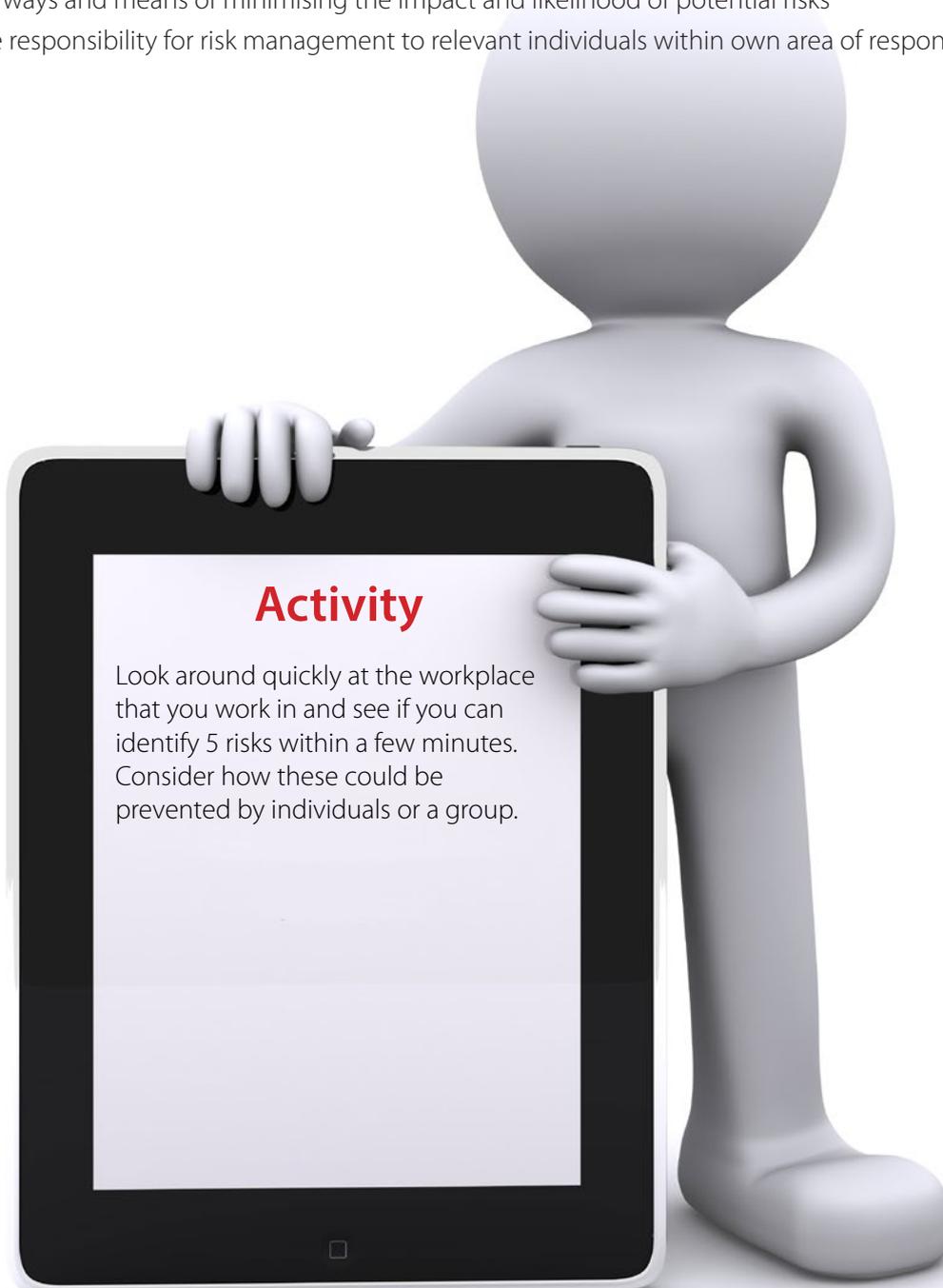
Learning Outcome 3 - Be able to communicate identified risks

Assessment criteria. I can:

3.1 Provide information on identified risks to relevant stakeholders

Did you know?

Workplace injuries and ill health (excluding cancer) cost society an estimated £13.4 billion in 2010/11 according to the Health and Safety Executive.

Adapted from Health and safety statistics: http://www.hse.gov.uk/statistics/

Key terms/words

Recognising Risks: being forward-thinking and identifying potential risks in any situation that is considered to be 'different' in the organisation is important. In an identifying role everything must be considered to ensure that all potential hazards are dealt with in an appropriate way with safety being paramount.

Hazards: these are situations that could pose a risk to individuals or groups in the workplace

Minimising risks: workplaces are not immune from risks, therefore, with designated staff who can identify risks, accidents can be minimised, thereby creating a safe workplace for all employees.

Stakeholders: stakeholders are anyone who has anything to do with the organisation, ranging from employees to suppliers, to people who live next door to the work place. All need to be considered when completing any risk assessment on activities to do with the organisation.

Points to note

Recognising and identifying risks is as important as communicating organisational procedures. All staff must be aware and the type of communication chosen to inform of such risks needs to ensure that staff get the appropriate and required information and act accordingly.

UNIT B10C (L/600/9622)

REVIEW RISK MANAGEMENT PROCESSES IN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to explain customer service standards to support staff and monitor customer service performance in own area of responsibility.

The unit is divided into three outcomes:

1. Be able to establish and communicate measurable customer service standards for own area of responsibility
2. Be able to support staff in meeting customer service standards
3. Be able to monitor and evaluate customer service performance, systems and processes.

UNIT B10C (L/600/9622)

REVIEW RISK MANAGEMENT PROCESSES IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Be able to establish and communicate measurable customer service standards for own area of responsibility

Assessment criteria. I can:

1.1   State organisational, legal and regulatory requirements for customer service
1.2   Explain expected standards for customer service performance to employees in own area of responsibility
1.3   Describe measurement criteria to monitor customer service performance

Learning outcome 2 - Be able to support staff in meeting customer service standards

Assessment criteria. I can:

2.1   Identify staff and other resources to meet customer service standards
2.2   Communicate roles and responsibilities to employees and provide support
2.3   Describe how to resolve customer service queries within own organisational policy

Activity

Conduct a survey asking colleagues about the best methods of communication for certain situations. The results will help you decipher which communication methods are appropriate when situations arise in the future.

Learning Outcome 3 - Be able to monitor and evaluate customer service performance, systems and processess

Assessment criteria. I can:

3.1   Monitor customer service performance against established criteria

3.2   Analyse feedback from staff and customers on the quality of customer service

3.3   Evaluate customer feedback and identify areas for improvement

3.4   Recommend changes to customer service processes or standards based on performance evaluation

Did you know?

WORLD BANK OPERATIONS EVALUATION DEPARTMENT state that monitoring and evaluating means learning from past experience, improving service delivery, planning and allocating resources, and demonstrating results as part of accountability to key stakeholders. Adapted from Monitoring & Evaluation: Some Tools, Methods & Approaches, © Copyright 2004 The International Bank for Reconstruction and Development/THE WORLD BANK

http://siteresources.worldbank.org/EXTEVACAPDEV/Resources/4585672-1251481378590/MandE_tools_methods_approaches.pdf

Key terms/words

Risk management process: a new process to an organisation should be consulted with key individuals within the business before the procedure is put into place. Managers should be consulted with any decisions that will be made for the good of the business.

Effectiveness: being an effective leader when identifying risks is important, as staff will look to you for answers. Staff will want to feel reassured that you have the confidence to deal with situations in your own area of responsibility and lead the group effectively.

Communicating outcomes to colleagues: selecting the correct method of communication to staff needs to be properly considered when it comes to important and potentially harmful situations. Will staff read an emailed document in full? Is a full staff meeting appropriate or team meeting?

Points to note

Reviews and evaluations often lead to improvements being made to old procedures which can only be positive to an organisation and its workforce.
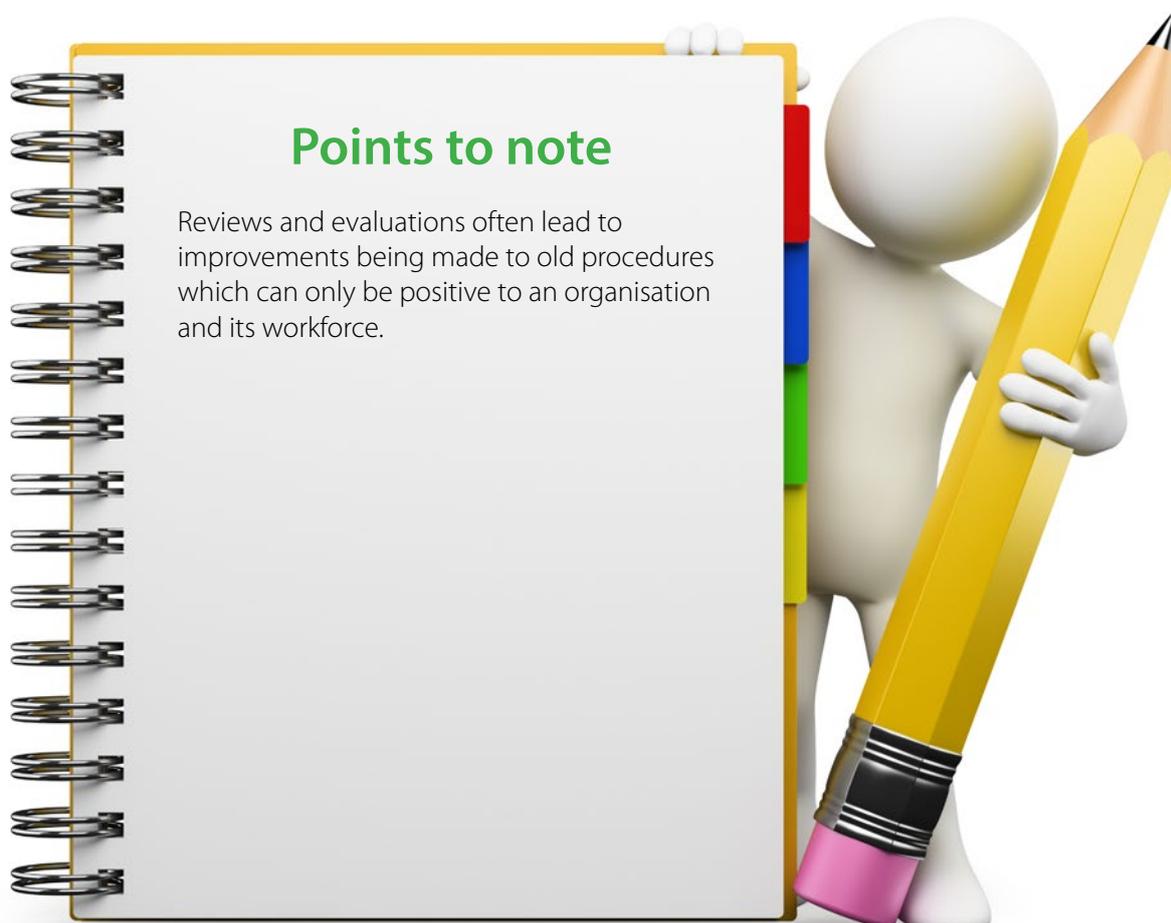
UNIT A1 (F/600/9469)

MANAGE PERSONAL DEVELOPMENT

THIS IS AN OPTIONAL UNIT

The purpose of this unit is to provide learners with the knowledge and understanding of managing personal development. You should be able to display that you can identify performance needs of a work role and how development activities can contribute to performance of an organisation.

The unit is divided into four outcomes:

1. Be able to identify performance requirements of own work role
2. Be able to measure and progress against objectives
3. Be able to identify gaps in skills and knowledge in own performance
4. Be able to carry out and assess activities within own development plan.
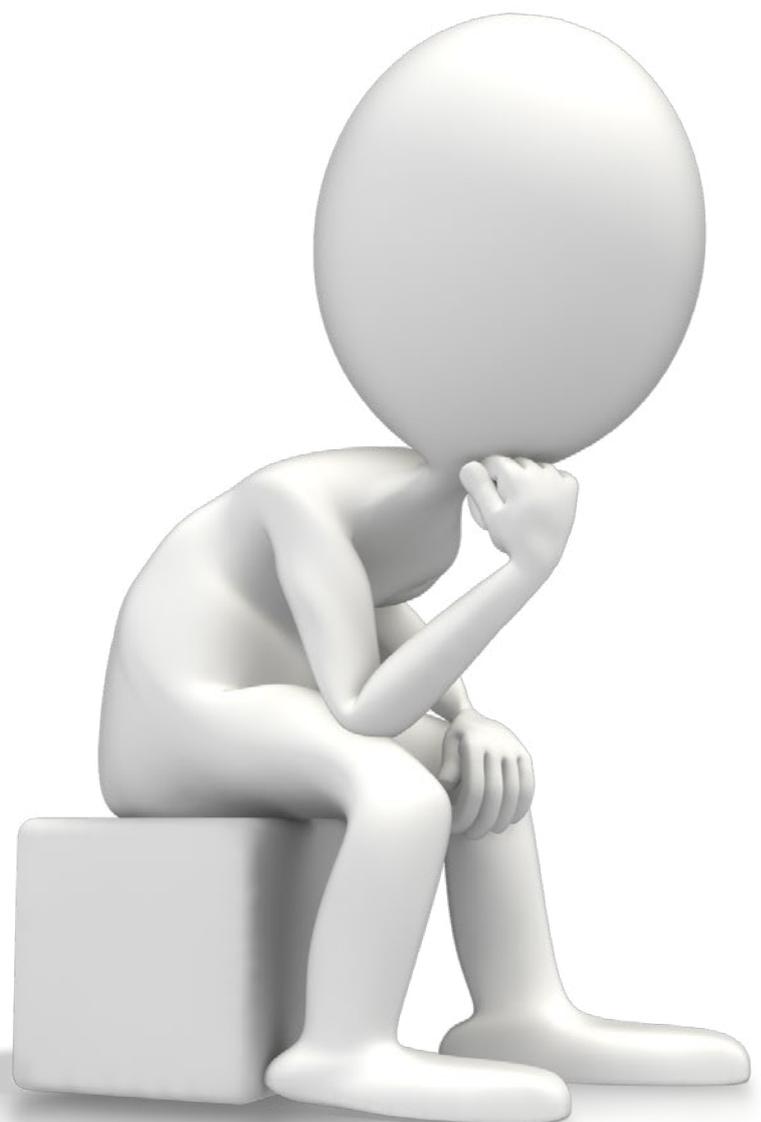
UNIT A1 (F/600/9469)

MANAGE PERSONAL DEVELOPMENT

Learning Outcome 1 - Be able to identify performance requirements of own work role

Assessment criteria. I can:

1.1   Outline work role performance requirements with those they report to

Learning outcome 2 - Be able to measure and progress against objectives

Assessment criteria. I can:

2.1   Identify ways that progress will be measured against own work objectives

Activity

List the main skills and knowledge required for a team leader – if you are not sure about these, you may find them in your Job Specification or Annual Appraisal record, and mark yourself against each of these using a grade 1-4, with 1 being low and 4 being high. Then ask your team members, line manager and other friendly work colleagues for honest and constructive criticism in assessing your skills and performance, using the same score card, to identify how others see you. Only ask those whom you feel will give helpful answers. This will help you to identify where you need to focus your development.

Learning Outcome 3 - Be able to identify gaps in skills and knowledge in own performance

Assessment criteria. I can:

3.1   Explain knowledge and skills required for own work role

3.2   Identify opportunities and resources available for personal development

3.3   Produce a development plan to address own needs and agree with line manager

Learning outcome 4 - Be able to carry out and assess activities within own development plan

Assessment criteria. I can:

4.1   Plan activities in own development plan that address identified needs

4.2   Collect feedback from colleagues on the result of development activities on own performance

4.3   Assess the success of activities carried out as part of own development plan

Did you know?

Leaders need to be aware that they may be seen as a role model. Ideally, they should embody everything the team stands for and provide an example that can be followed. For example, they should demonstrate how they develop their own skills and knowledge if they expect their team members to do the same.
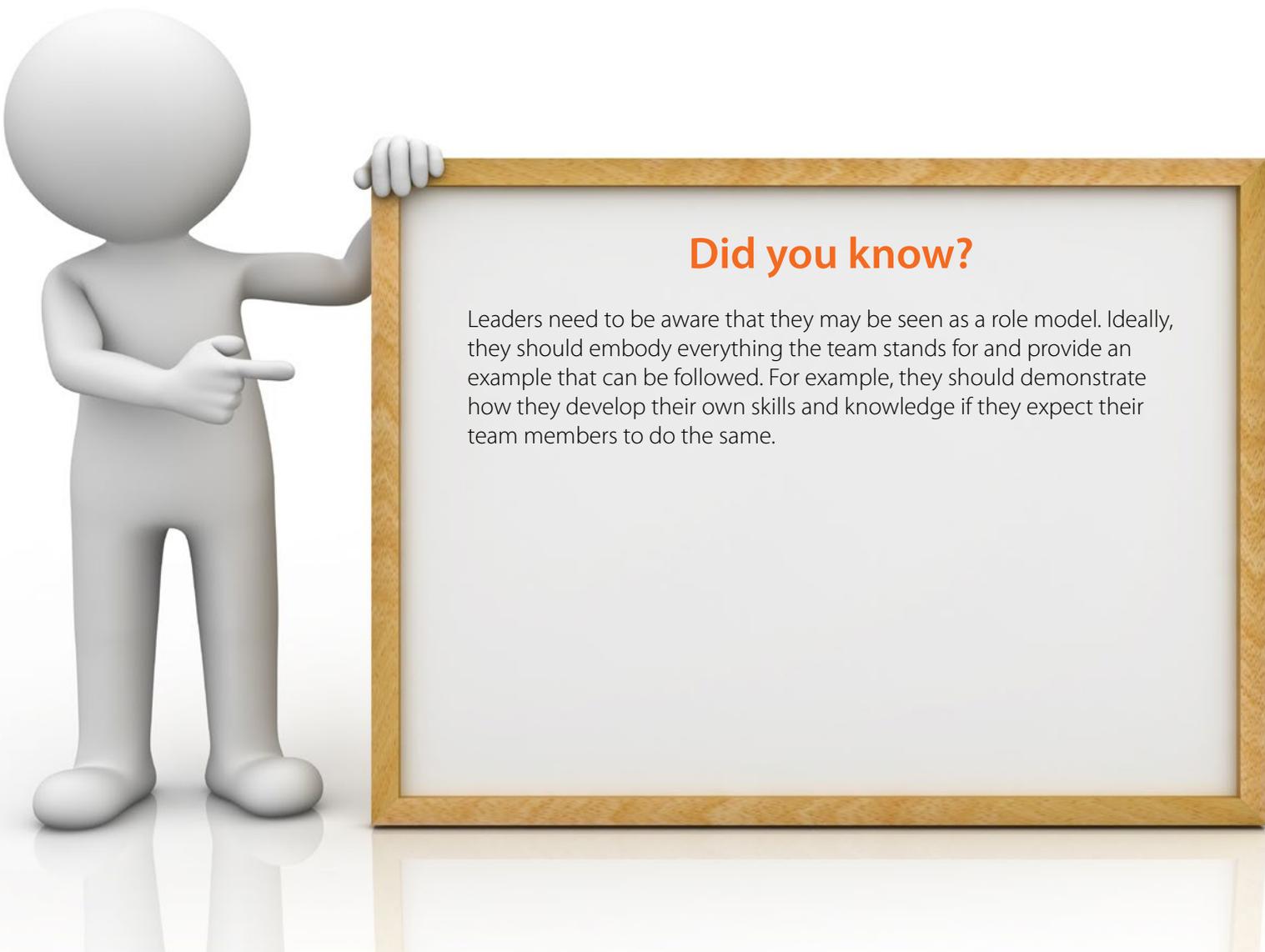
Key terms/words

Performance requirements: what is expected of you by your manager and the organisation. This may include ensuring that you have the necessary skills, knowledge and attributes to lead your team – effective communication skills, motivational skills, respect for others, knowledge of what makes for a successful team, a clear understanding of the tasks to be achieved and the timescales involved, and a positive attitude.

Work objectives: the objectives given to your team by your line manager for which you have responsibility – these may include, for example, targets for production and quality of output of the product or service and perhaps targets for attendance or time-keeping, ensuring the team is fully trained, or reduction in faults, returns or complaints.

Development plan: this is a plan you produce that identifies what skills and knowledge you need to develop further to be more effective in your role and how and when you plan to gain these – based on your personal learning style. For example, you may choose, for each area of skill or knowledge identified, a specific training course, or being given guidance by a particular work colleague or perhaps, changing your own attitude or approach! The plan should explain why you need to undertake these activities, the options available and the likely costs of each as well as the benefits which will be obtained both by you and your organisation.

Points to note

It is your responsibility to ensure that you develop your skills and knowledge to ensure that you are, and continue to be, seen as an effective team leader.
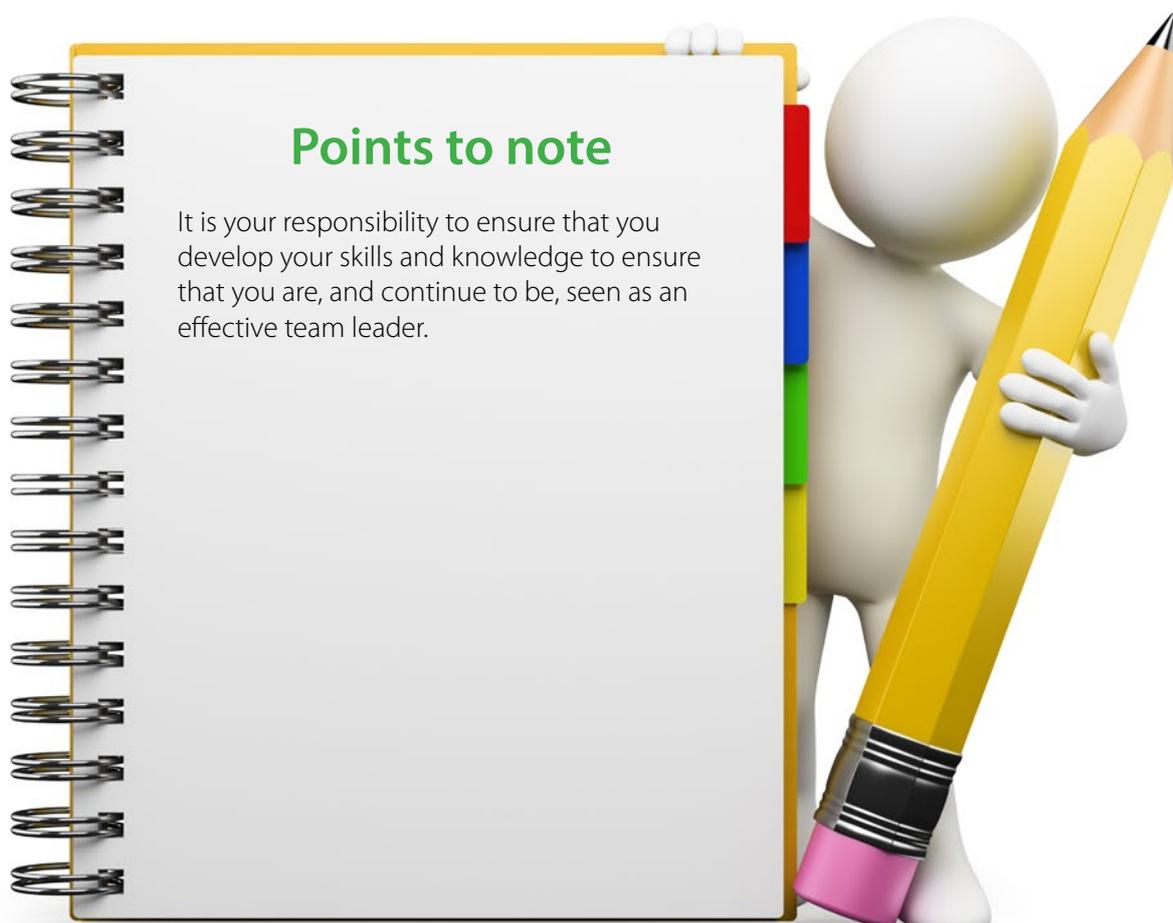
UNIT B11 (M/600/9628)

MANAGE OR SUPPORT EQUALITY OF OPPORTUNITY, DIVERSITY AND INCLUSION IN OWN AREA OF RESPONSIBLITY

THIS IS AN OPTIONAL UNIT

This unit aims to equip the candidate with the awareness to understand the need to ensure equality of opportunity and the benefits of diversity. The candidate is able to consider how to apply and actively promote equality and diversity in own area of responsibility.

The unit is divided into three outcomes:

1. Understand own responsibilities under equality legislation, relevant codes of practice and own organisational policies
2. Be able to communicate an organisation's written equality, diversity and inclusion policy and procedures in own area of responsibility
3. Be able to monitor equality, diversity and inclusion within own areas of responsibility.
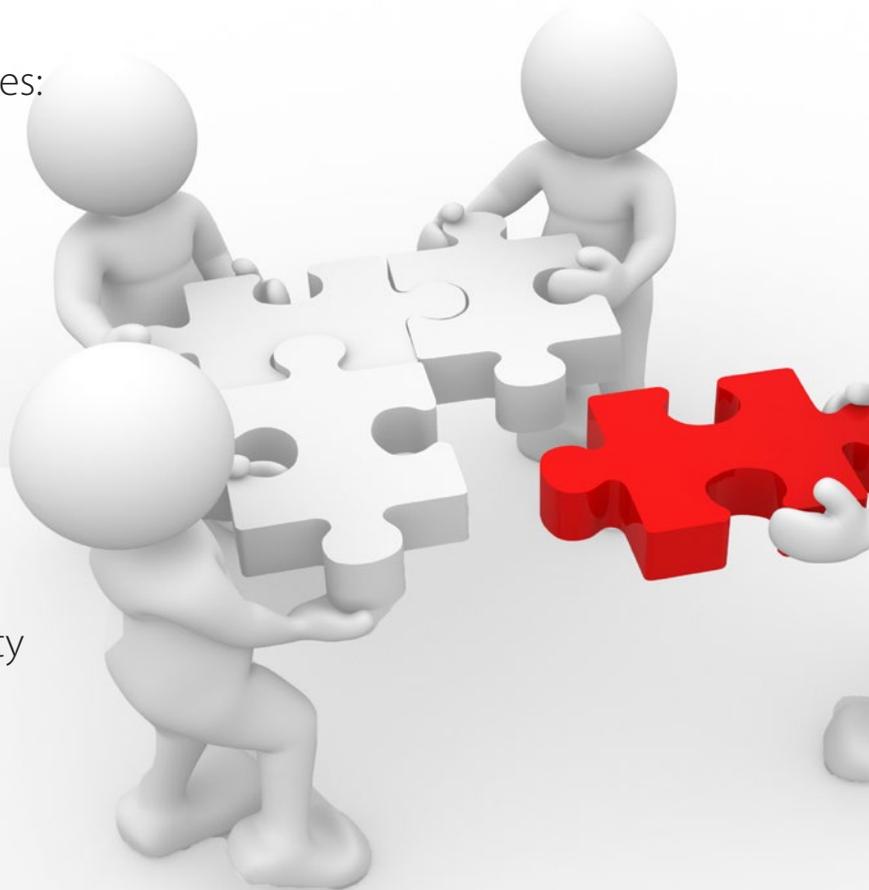
UNIT B6 (T/600/9601)

MANAGE OR SUPPORT EQUALITY OF OPPORTUNITY, DIVERSITY AND INCLUSION IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Understand own responsiblities under equality legislation, relevant codes of practice and own organisational policies

Assessment criteria. I can:

1.1   Explain how equality of opportunity, diversity and inclusion relate to legal, industry requirements and organisational policies

1.2   Describe how equality of opportunity, diversity and inclusion are considered in planning own area of responsibility

Learning outcome 2 - Be able to communicate an organisation's written equality, diversity and inclusion policy and procedures in own area of responsibility

Assessment criteria. I can:

2.1   Outline an organisations equality, diversity and inclusion policy and procedures
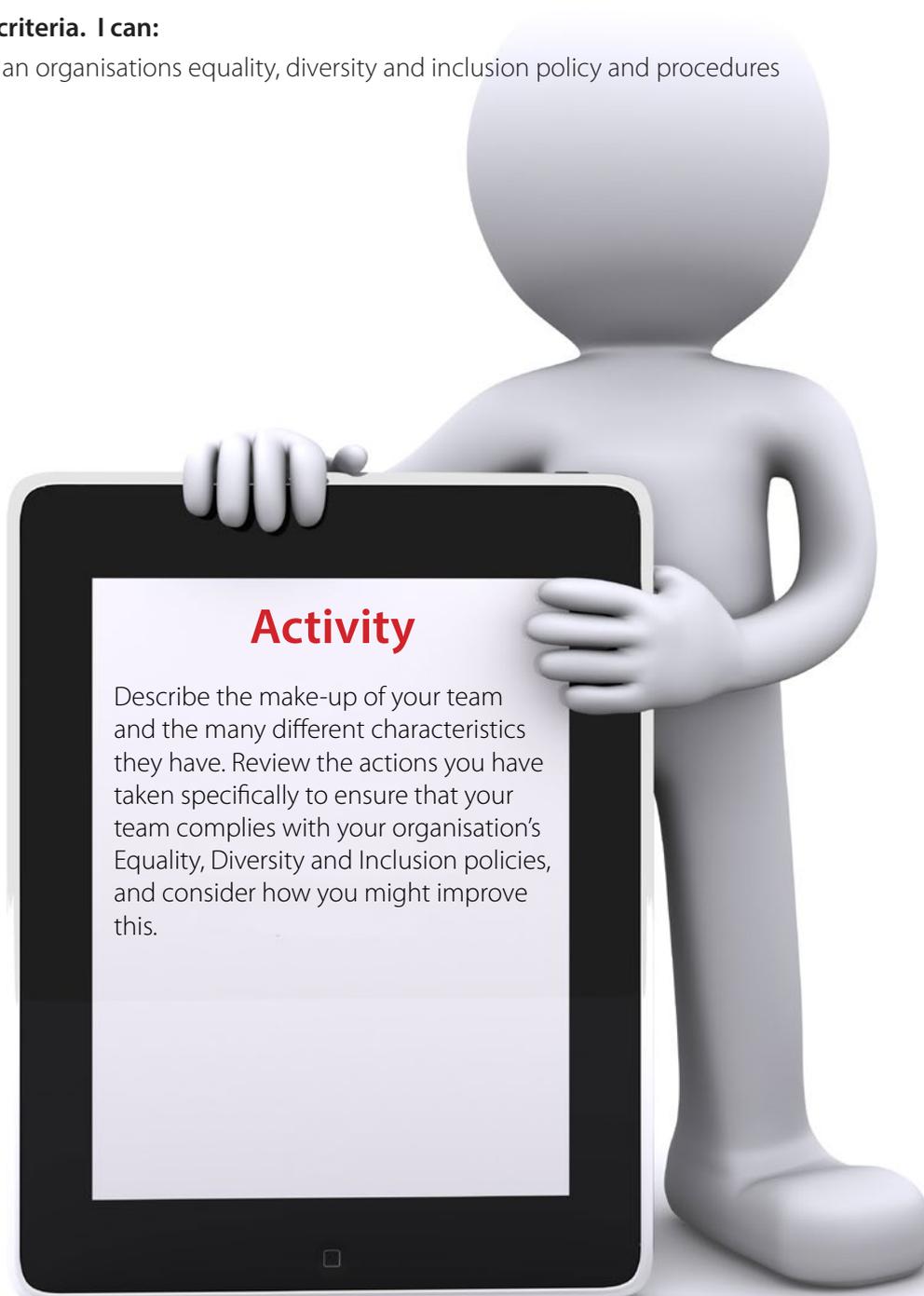
Activity

Describe the make-up of your team and the many different characteristics they have. Review the actions you have taken specifically to ensure that your team complies with your organisation's Equality, Diversity and Inclusion policies, and consider how you might improve this.

Learning Outcome 3 - Be able to monitor equality, diversity and inclusion within own areas of responsibility

Assessment criteria. I can:

3.1   Monitor how equality, diversity and inclusion activities on own area of responsibility are in line with own organisation

Did you know?

The aim of organisational Equality and Diversity policies is to encourage harmony and respect amongst individuals so as to promote good working practices with a view to maximising the performance and well being of its employees. If equal opportunities are not applied then valuable talent and potential are wasted.

Moreover, when unfair discrimination, harassment, bullying or victimisation take place, they bring about a climate of fear, insecurity and poor work performance. As well as being unlawful it affects profitability and morale.

Key terms/words

Equality of opportunity (EO): is enshrined in British legislation (Equality Act 2010 and many other Acts over the previous 40 years) and every organisation is required to have an Equal Opportunities Policy. The EO law is based on fairness and requires that individuals must not be discriminated against, either directly or indirectly, because of a specific characteristic that differentiates them from another, for example, age, disability, gender, nationality, race, religion or sexual orientation.

Diversity and inclusion: relates to the make-up of the group or team and the actions taken to ensure that all its members are treated fairly. Diversity covers not only those characteristics covered by Equalities legislation but may also include, for example, full time and part-time staff, home/distance workers, language or cultural differences and the experience of the individual members.

Industry requirements: every industry must comply with the EO legislation but some workplaces or activities are exempted from certain elements of it. If your workplace is one such, then this should be fully explained in your organisation's Policy.

Organisational policy: this is usually the policy that covers all matters relating to equality of opportunity, diversity and inclusion within the organisation and what is expected of employees. It may also include such aspects as harassment or bullying at work.
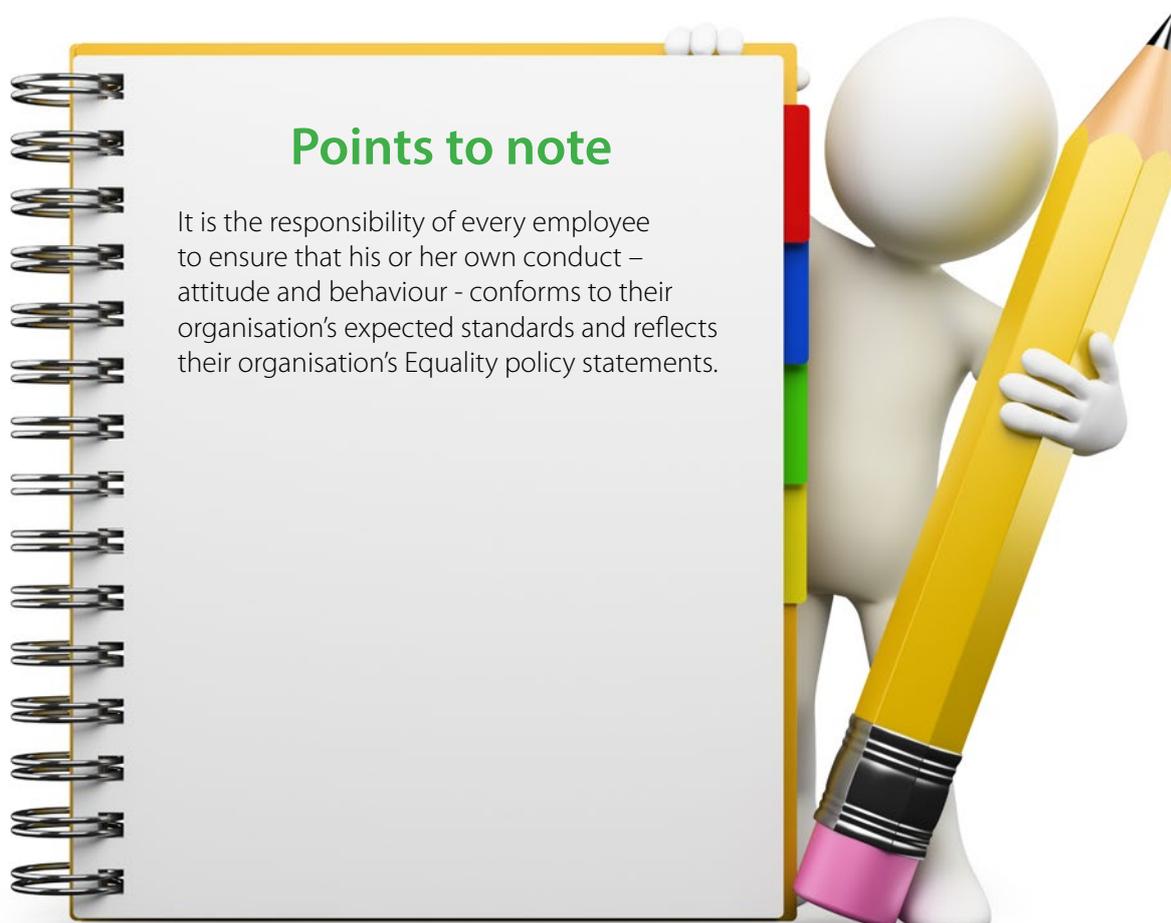
Points to note

It is the responsibility of every employee to ensure that his or her own conduct – attitude and behaviour - conforms to their organisation's expected standards and reflects their organisation's Equality policy statements.

UNIT C1 (L/600/9636)

SUPPORT TEAM MEMBERS IN IDENTIFYING, DEVELOPING AND IMPLEMENTING NEW IDEAS

THIS IS AN OPTIONAL UNIT

This purpose of this unit is to provide learners with the knowledge and understanding of how to support team members to identify, develop and implement new ideas. It also covers the different methods of motivation to support innovation.

The unit is divided into four outcomes:

1. Be able to develop team ideas and develop creativity of team members
2. Be able to assess the viability of a team member's idea
3. Be able to support team members to implement ideas
4. Be able to implement team ideas.

UNIT C1 (L/600/9636)

SUPPORT TEAM MEMBERS IN IDENTIFYING,DEVELOPING AND IMPLEMENTING NEW IDEAS

Learning Outcome 1 - Be able to develop team ideas and develop creativity of team members

Assessment criteria. I can:

1.1   Encourage team members to identify ideas

1.2   Record team member ideas

Learning outcome 2 - Be able to assess the viability of a team member's idea

Assessment criteria. I can:

2.1   Assess with team members the potential benefits and risks associated with an idea and the resources required

Activity

Identify a time when you gave support to a colleague in the development and implementation of an idea and describe how you did this.
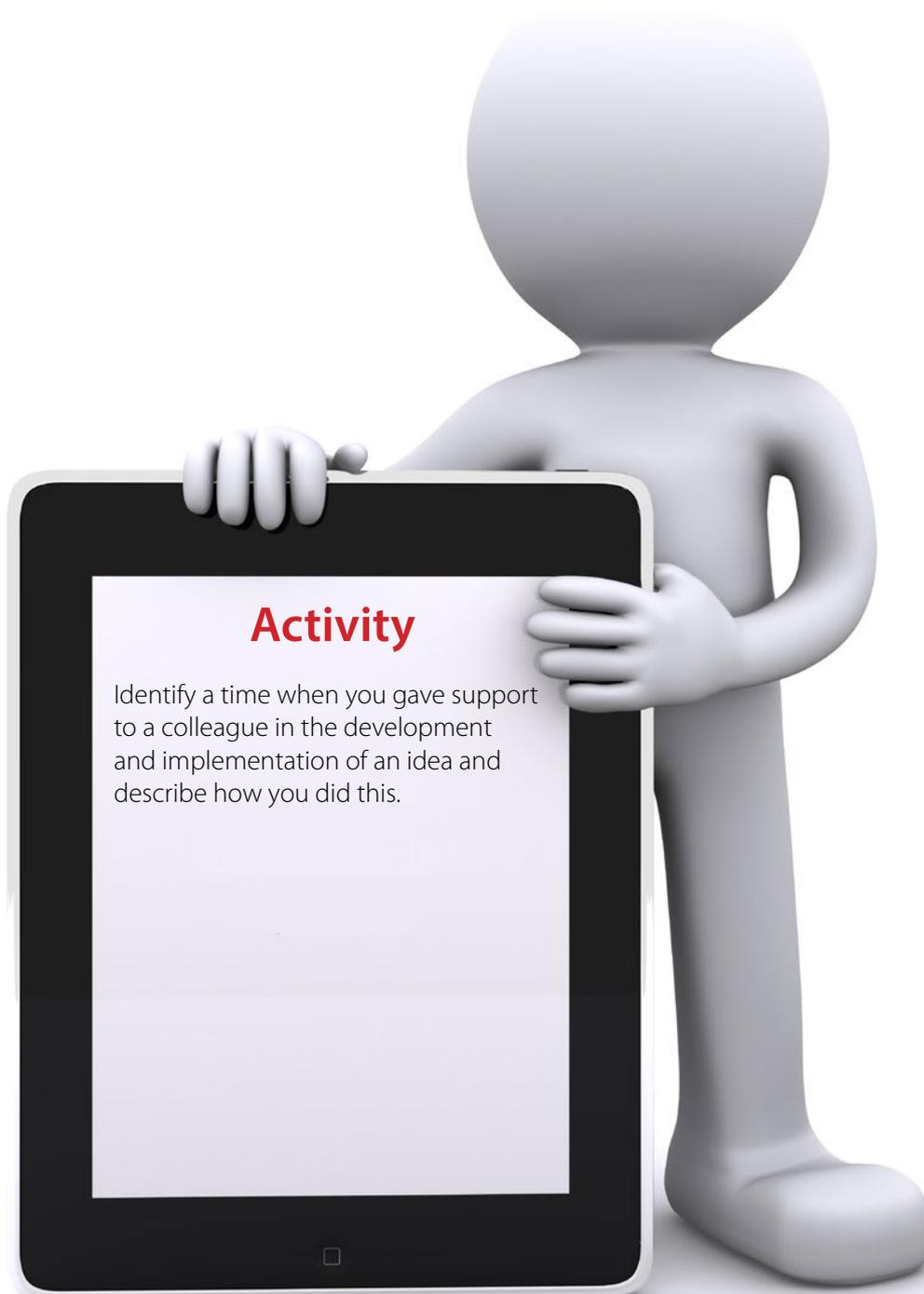
Learning Outcome 3 - Be able to support team members to implement ideas

Assessment criteria. I can:

3.1   Explain how to support team members in submitting formal proposals for approval

3.2   Explain to team members how to identify and overcome barriers to implementing an idea

Learning Outcome 4 - Be able to implement team ideas

Assessment criteria. I can:

4.1   Monitor the implementation of ideas by own team

4.2   Communicate the progress of implementation to relevant others own organisation

Did you know?

In 1968, Dr. Spencer Silver, a chemist at 3M in the United States, was attempting to develop a super-strong adhesive, but instead he accidentally created a "low-tack", reusable, pressure-sensitive adhesive. For five years, Silver promoted his invention within 3M, both informally and through seminars, but without much success. In 1974, a colleague of his, Art Fry, who had attended one of Silver's seminars, came up with the idea of using the adhesive to anchor his bookmark in his hymnbook. Fry then developed the idea by taking advantage of 3M's officially sanctioned "permitted bootlegging" policy. 3M launched the product in stores in 1977 in four cities under the name "Press 'n Peel", but its results were disappointing. A year later, in 1978, 3M issued free samples to residents of Boise, Idaho, and 94 percent of the people who tried them said that they would buy the product. On April 6, 1980, the product debuted in US stores as "Post-It Notes".

Key terms/words

Creativity: is the development of ideas – completely new ways of doing things (processes), new technology, or new services, or the improving of current processes, technology or services, or both.

Assess viability: not all ideas are viable, that is, practical and reasonable. An idea may at first appear to be good, but when fully analysed it may, for example, prove too costly to implement, or breach Health and Safety rules, or have a negative effect on the work of other processes, teams or departments, be too expensive to sell or have too small a potential market to warrant its development.

Cost versus benefits: you will need to identify all the costs involved in implementing the new idea, remembering to consult other teams/departments if the idea impacts on them, and also the direct savings or other, indirect benefits, that will be gained from implementing the idea.

Payback information: provides details of how soon the costs of implementing the new idea will be recovered by the reduced costs of the revised process and/or increased sales of the product or service.

Points to note

It is your responsibility to create the space, time and environment for collective and individual creative thinking about your work.
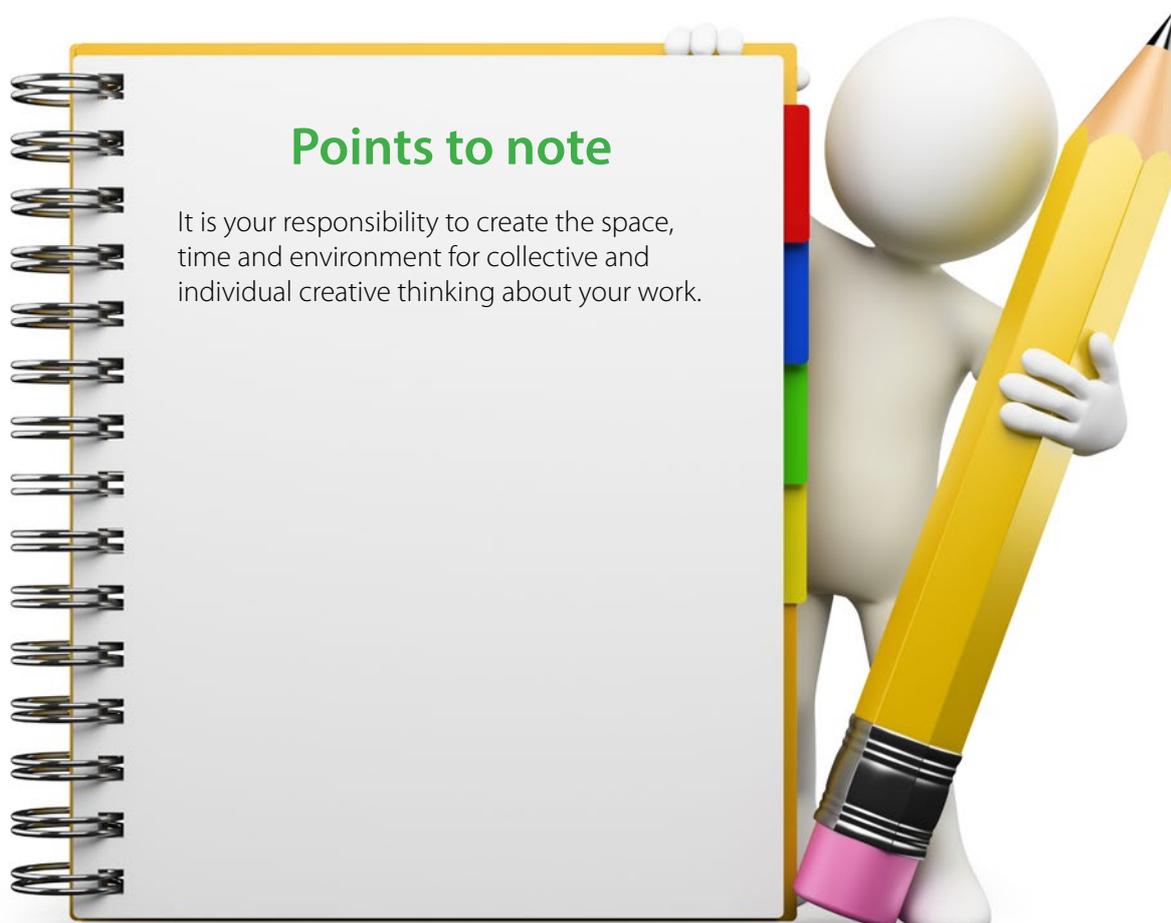
UNIT C6 (M/600/9659)

IMPLEMENT CHANGE IN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit helps learners to implement and evaluate a plan for change in their area of responsibility.

The unit is divided into three outcomes:

1. Understand how to implement change in own area of responsibility
2. Be able to involve and support others through the change process
3. Be able to implement and monitor a plan for change in own area of responsibility

UNIT C6 (M/600/9459)

IMPLEMENT CHANGE IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Understand how to implement change in own area of responsibility

Assessment criteria. I can:

1.1   Explain the main models and methods for managing change

Learning outcome 2 - Be able to involve and support others through the change process

Assessment criteria. I can:

2.1   Communicate the benefits of and reasons for change and how they relate to business objectives

2.2   Implement and agree a plan to support change

Activity

Reflect upon a recent change (up to 12 months) that was implemented by a colleague in your place of work. Think about: who was involved, what communication methods were used to inform staff of the changes? How did colleagues initially react? How did it make you feel? Was the change for the better? Has the change improved the business?
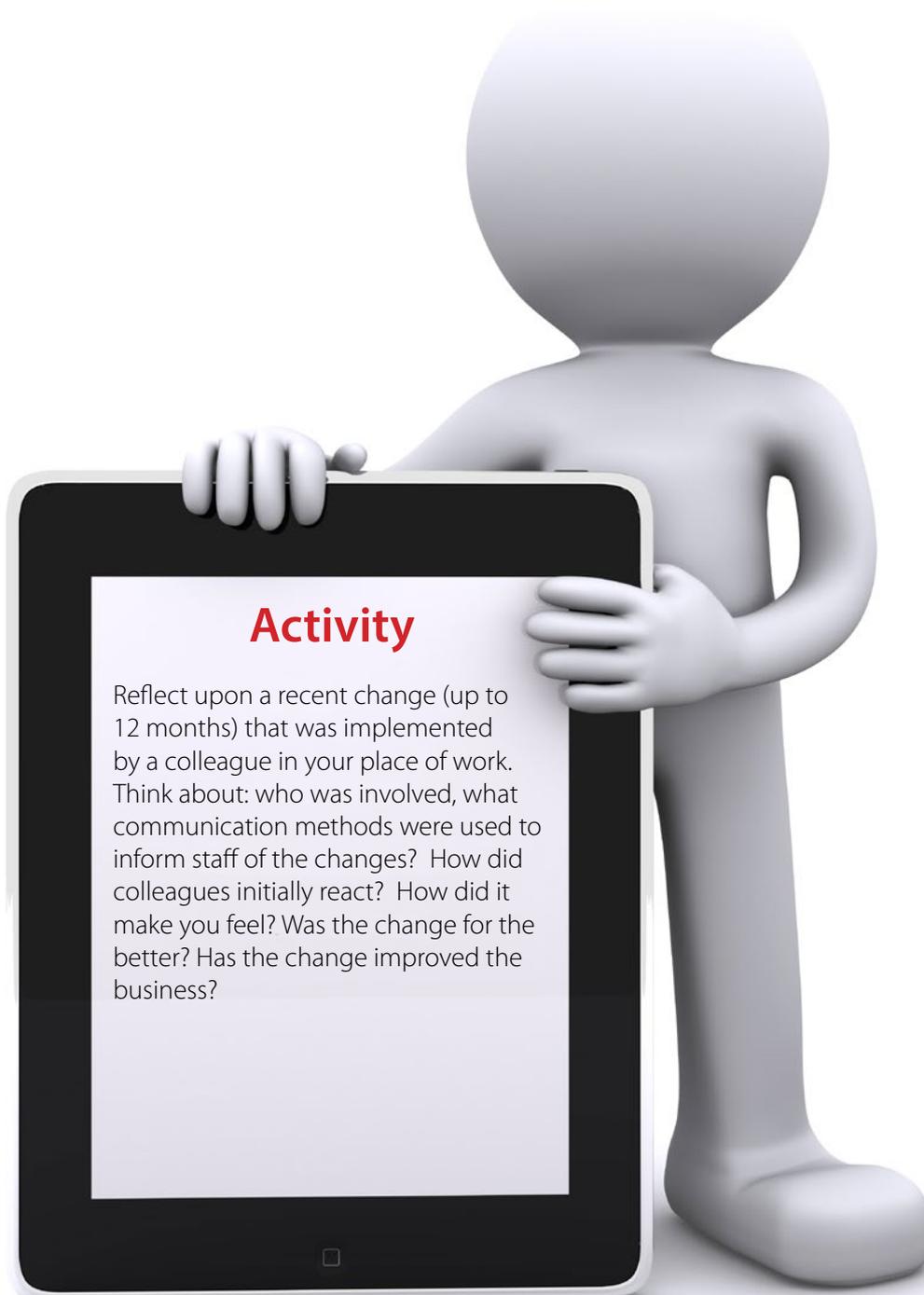
Learning Outcome 3 - Be able to implement and monitor a plan for change in own area of responsibility

Assessment criteria. I can:

3.1   Apply SMART (Specific, Measurable, Achievable, Realistic and Time-bound) objectives with individuals and teams to plan for change

3.2   Assess opportunities and barriers to change

3.3   Review action plans and activities according to identified opportunities and barriers to change
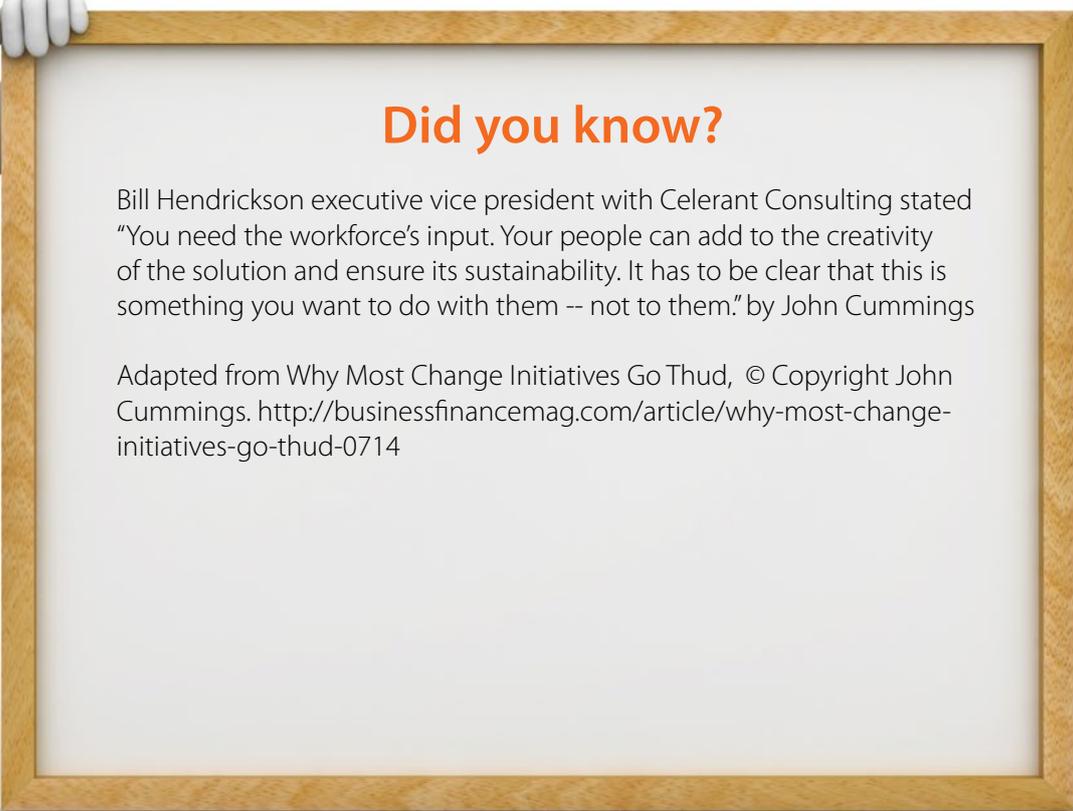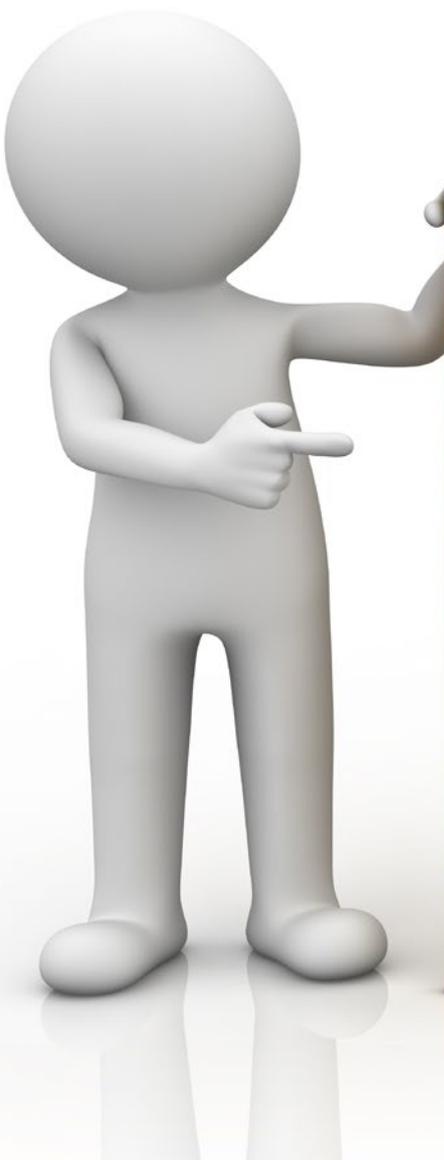
Did you know?

Bill Hendrickson executive vice president with Celerant Consulting stated "You need the workforce's input. Your people can add to the creativity of the solution and ensure its sustainability. It has to be clear that this is something you want to do with them -- not to them." by John Cummings

Adapted from Why Most Change Initiatives Go Thud, © Copyright John Cummings. http://businessfinancemag.com/article/why-most-change-initiatives-go-thud-0714

Key terms/words

Models: often diagrams that outline a new process that a business is to follow to ensure that colleagues understand the new procedures easily.

Managing change: employees can often resist change especially if it can potentially involve extra work, a change to working arrangements or new technology. You can show colleagues the benefits of implementing such change into the organisation to gain their trust and co-operation.

Supporting others: some colleagues may show anxiety in different forms. You will therefore need to recognise these forms, reassuring them when required and in an appropriate manner. This will build trust and loyalty.

Points to note

The process of implementing any change to an organisation must be considered carefully to ensure the full co-operation of all involved.

Trust is paramount in any business.
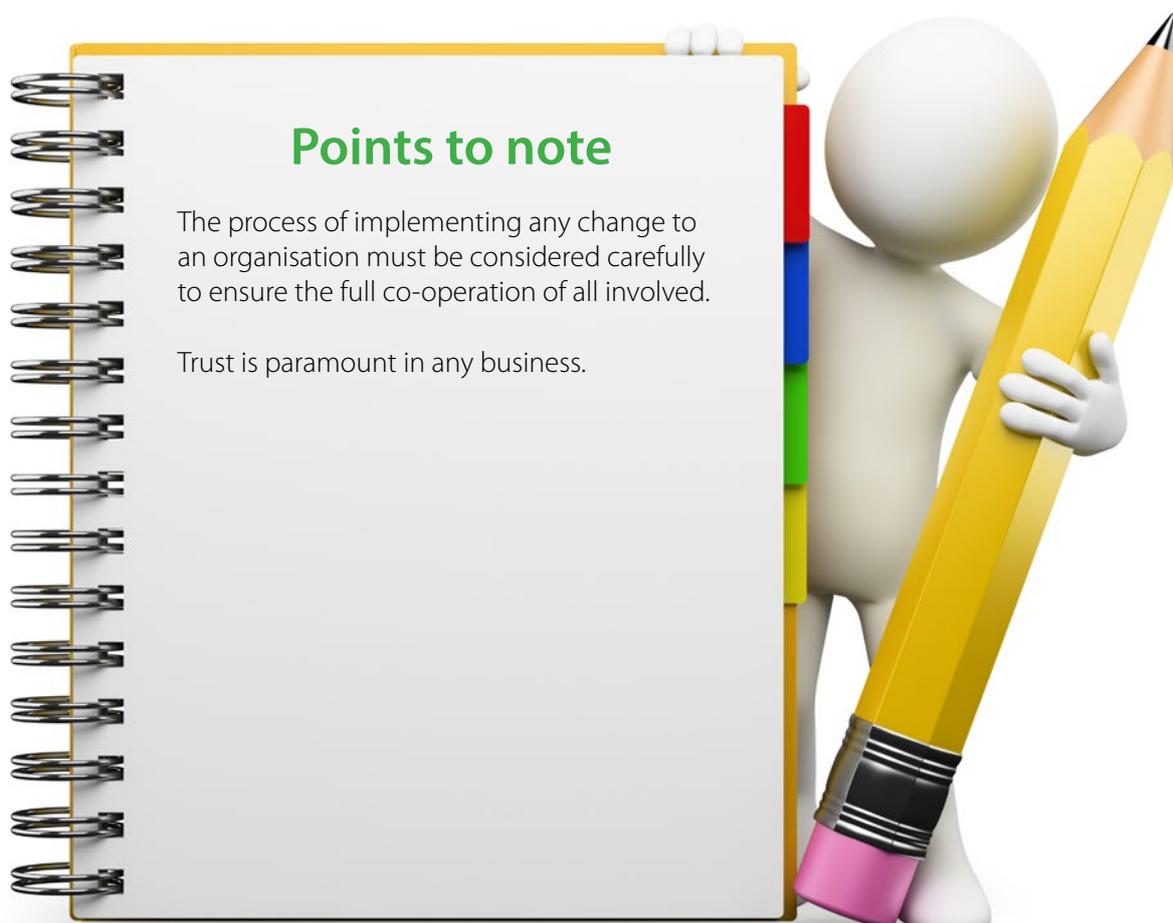
UNIT D2A (K/600/9661)

DEVELOP WORKING RELATIONSHIPS WITH COLLEAGUES AND STAKEHOLDERS

THIS IS AN OPTIONAL UNIT

This unit helps learners to contribute to the recruitment, selection and induction of staff and evaluate the processes used.

The unit is divided into four outcomes:

1. Be able to review human resource requirements to meet business objectives in own area of responsibility
2. Understand the importance of ensuring that recruitment and selection processes meet legal, regulatory, ethical and social requirements
3. Be able to participate in the recruitment and selection process
4. Be able to evaluate the recruitment and selection process and identify improvements for the future
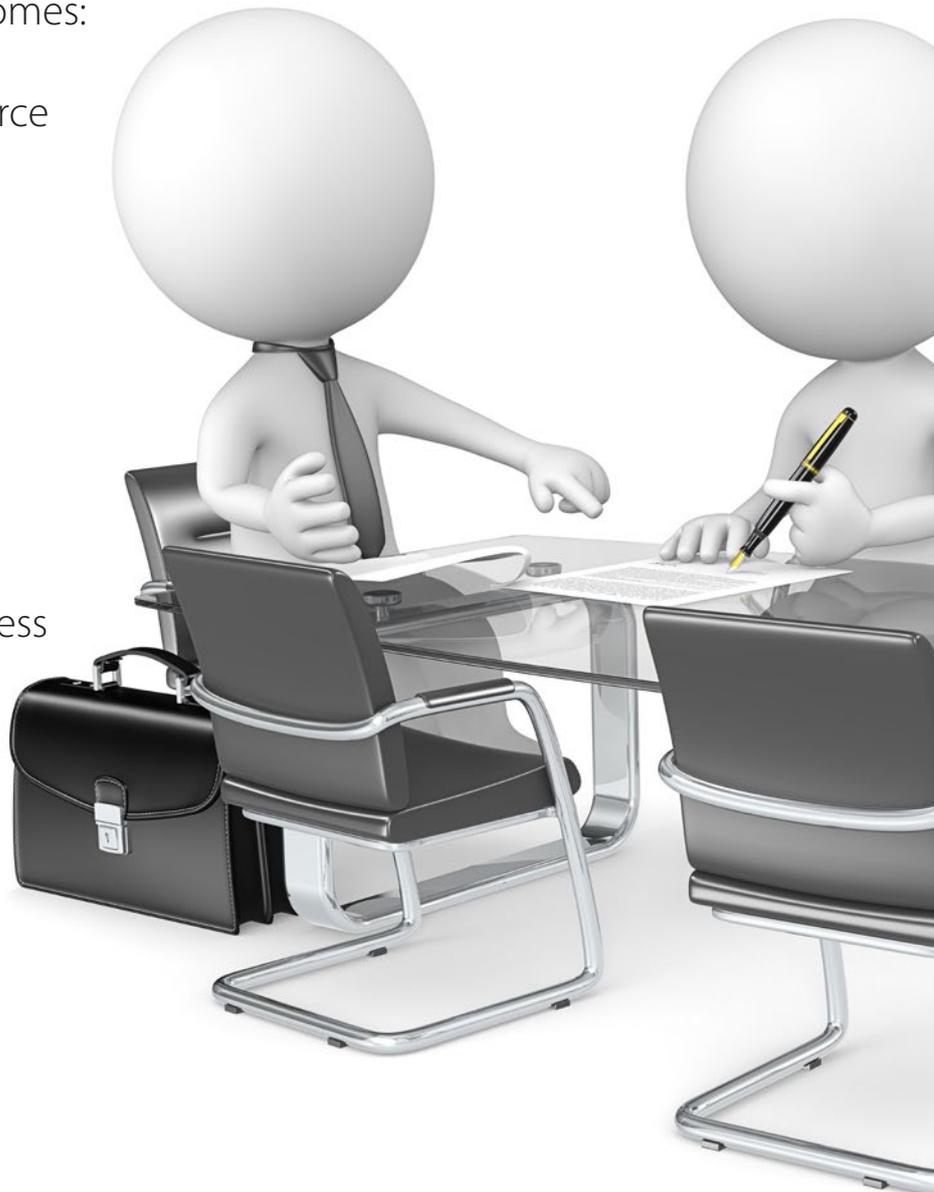
UNIT D2A (K/600/9661)

DEVELOP WORKING RELATIONSHIPS WITH COLLEAGUES AND STAKEHOLDERS

Learning Outcome 1 - Know how to identify stakeholders and their relevance to an organisation

Assessment criteria. I can:

1.1   Identify an organisation's stakeholders

1.2   Evaluate the roles, responsibilities, interests and concerns of stakeholders

1.3   Assess the importance of identified stakeholders

Learning outcome 2 - Understand how to establish working relationships with colleagues and stakeholders

Assessment criteria. I can:

2.1   Clarify how to agree a common sense of purpose with colleagues and stakeholders

2.2   Summarise how to create an environment of trust and mutual respect with colleagues and stakeholders

Activity

Develop a suggestions box in your workplace on those forms of communication that colleagues feel are the most effective and the least effective in their place of work.
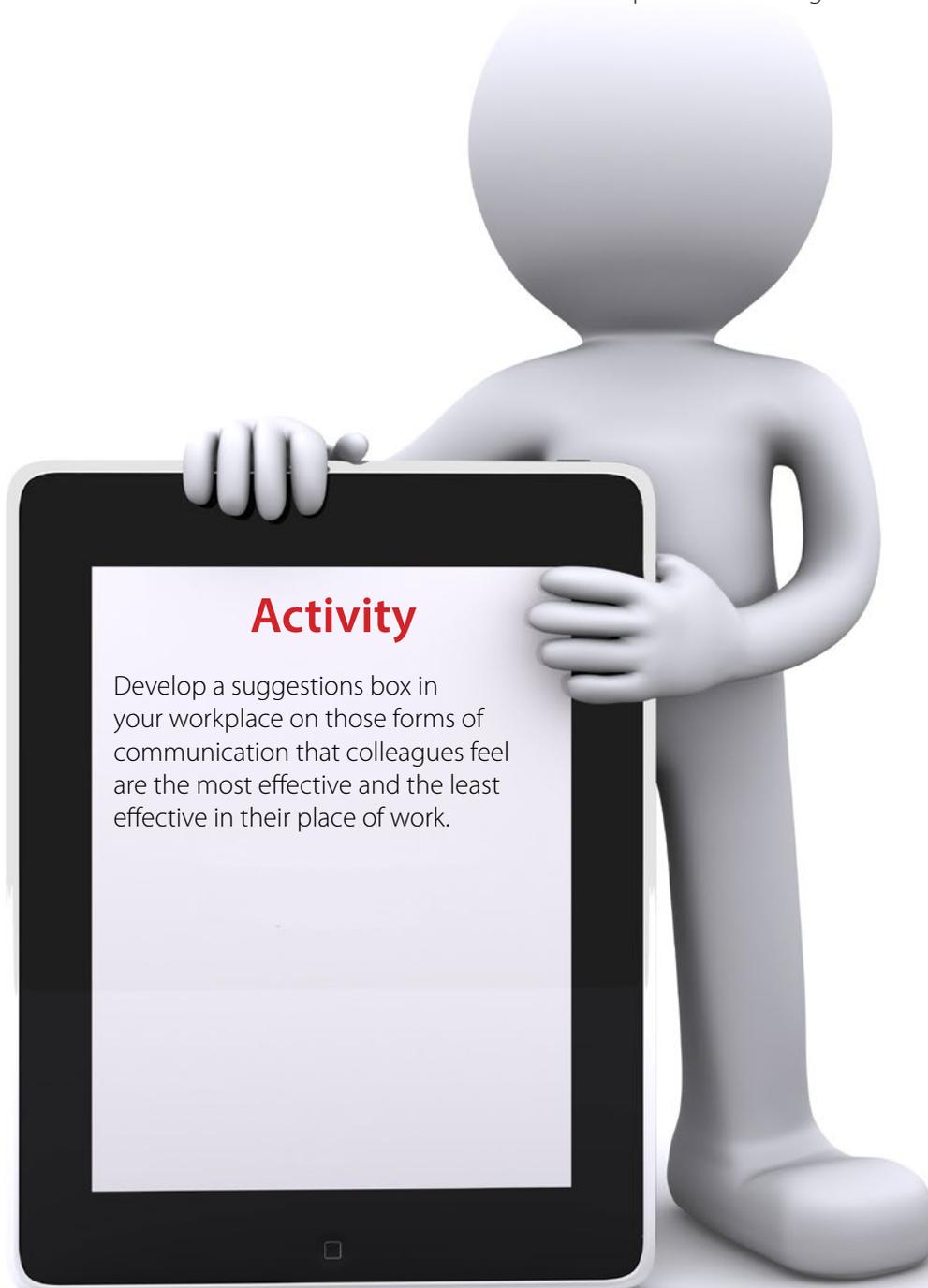
Learning Outcome 3 - Be able to create an environment of trust and mutual respect with colleagues and stakeholders

Assessment criteria. I can:

3.1   Review and revise the needs and motivations of colleagues and stakeholders

3.2   Demonstrate interaction with colleagues and stakeholders that allows respect for the views and actions of others

Did you know?

Email is the most common form of business communication. It is important however to ensure that you are aware of who your message is intended for, in terms of your target audience. You must then ensure that your message is clearly and concisely written in a simple form so that people can understand your message easily.
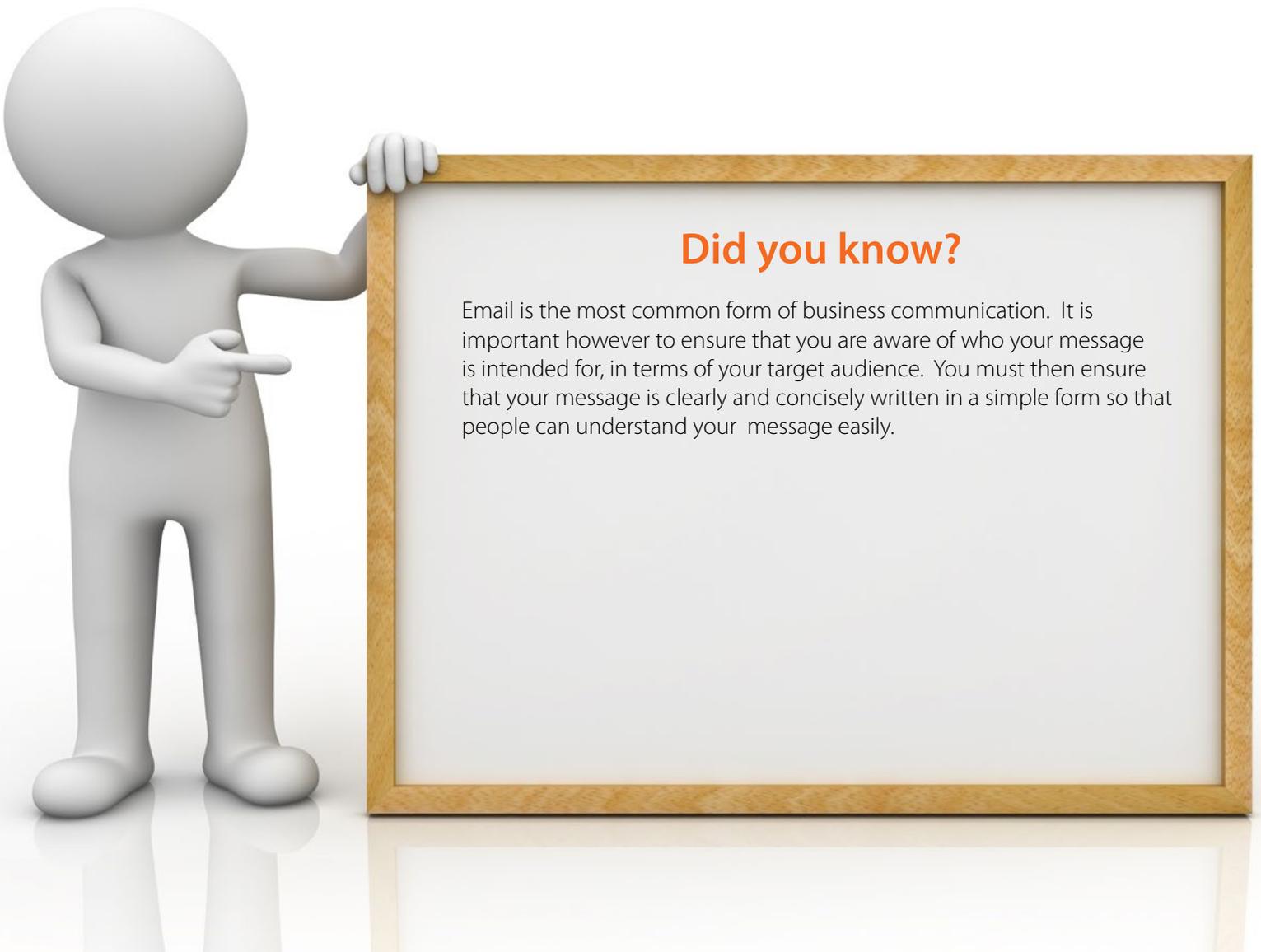
Key terms/words

Stakeholders: stakeholders are anyone who has anything to do with the organisation, from employees to suppliers, to people who live next door to the work place. All need to be considered when completing any risk assessment on activities to do with the organisation.

Roles and responsibilities: being aware of each other's roles and responsibilities in a business is crucial, so that you know who to go to for advice and guidance on working matters. A good clear organisational structure will provide such information.

Establishing working relationships: good working practices are formed by establishing effective working relationships. Team building, away days and group activities can enhance the group dynamics in a team situation, resulting in a more positive outlook for the organisation.

Mutual respect: it is important in business to respect everyone. This shows that you take people's opinions and interests seriously and want to form good working relationships for the good of the organisation.

Points to note

Methods of communication will vary according to the type of information that you need to inform to colleagues.

Stakeholders are often crucial in business, so be aware of the potential impact of any communications.

UNIT D3A (T/600/9663)

RECRUIT STAFF IN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit helps learners to contribute to the recruitment, selection and induction of staff and evaluate the processes used.

The unit is divided into four outcomes:

1. Be able to review human resource requirements to meet business objectives in own area of responsibility
2. Understand the importance of ensuring that recruitment and selection processes meet legal, regulatory, ethical and social requirements
3. Be able to participate in the recruitment and selection process
4. Be able to evaluate the recruitment and selection process and identify improvements for the future

UNIT D3A (T/600/9663)

RECRUIT STAFF IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Be able to review human resource requirements to meet business objectives in own area of responsibility

Assessment criteria. I can:

1.1   Examine the human resources required to meet objectives in own area of responsibility

1.2   Identify gaps between current and required human resources to meet objectives

1.3   Assess the options for human resource requirements to meet objectives

Learning outcome 2 - Understand the importance of ensuring that recruitment and selection processes meet legal, regulatory, ethical and social requirements

Assessment criteria. I can:

2.1   Explain how to ensure recruitment and selection processes are fair

2.2   Explain how to ensure that legal requirements, industry regulations, organisational policies and professional codes are met

2.3   Explain when to seek specialist expertise throughout the recruitment process

Activity

Reflect upon the recruitment process that you were part of in order to be employed by your current organisation.

What would you have done differently?

What would you recommend to management?
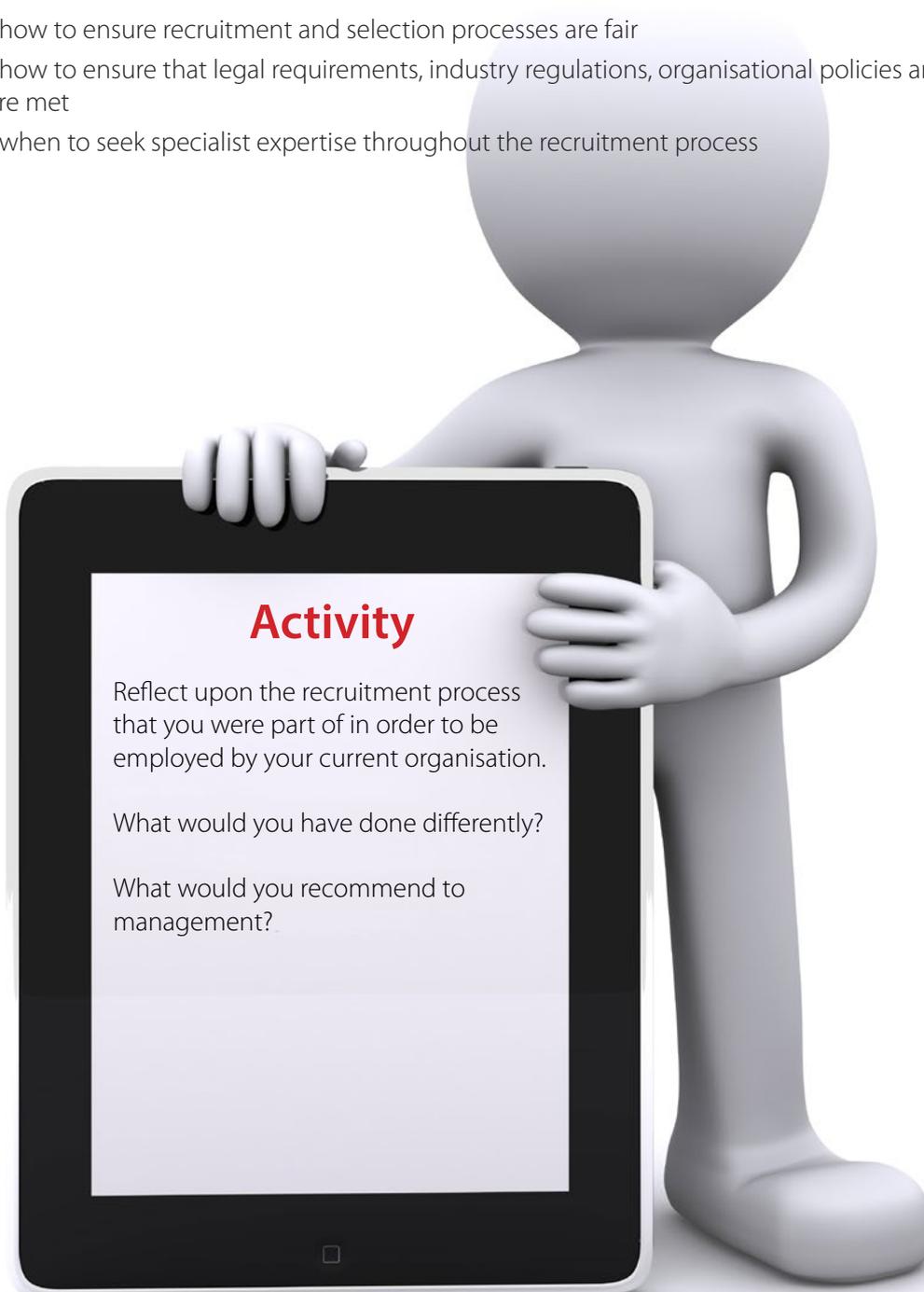
Learning Outcome 3 - Be able to participate in the recruitment and selection process

Assessment criteria. I can:

3.1   Consult with relevant others to produce or update job descriptions

3.2   Agree with colleagues the stages in the recruitment and selection process for identified vacancies

3.3   Identify the methods and criteria that will be used in the recruitment and selection process

Learning Outcome 4 - Be able to evaluate the recruitment and selection process and identify improvements for the future

Assessment criteria. I can:

4.1   Assess and select candidates using agreed methods and criteria

4.2   Evaluate the recruitment and selection methods and criteria used in own area of responsibility

4.3   Identify ways of improving future recruitment and selection

Did you know?

A new survey has revealed that employers are moving online to hire new recruits. Networking and local press, once seen as the most effective ways to attract new staff, is now used by only 5% of respondents.

Adapted from Employers recruiting online   http://www.prospects.ac.uk/latest_news_employers_recruiting_online.htm
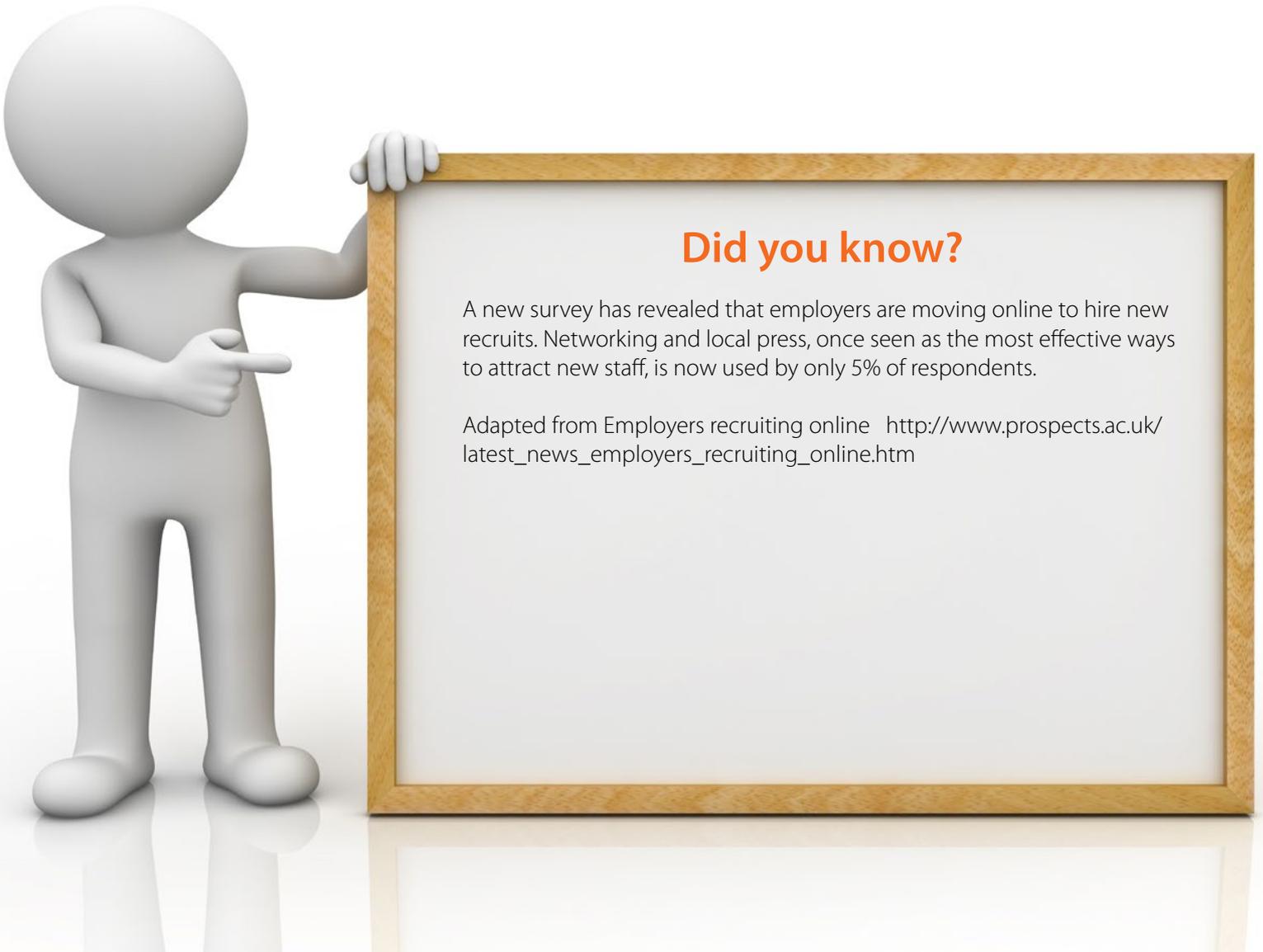
Key terms/words

Human resources department: this department is responsible for recruiting new staff into the organisation by following an effective company recruitment process. All documentation, training and staff well-being is dealt with in this department, so it is crucial to the effective running of a successful business.

Staff turnover: a high turnover of staff in business should sound alarm bells to management. A low turnover of staff will satisfy management that staff are happy in the organisation and will be working towards the same goals.

Recruitment process: an effective recruitment process will ensure that a business gains the best staff for the organisation. A new member of staff will cost money in terms of time, as well as the expense of advertising for employees, so it is important the process is effective to gain the most suitable candidates.

Employment law: all businesses must follow the laws which are there to protect both employees and employers.

Points to note

A successful recruitment process is beneficial to both the organisation as well as a team.
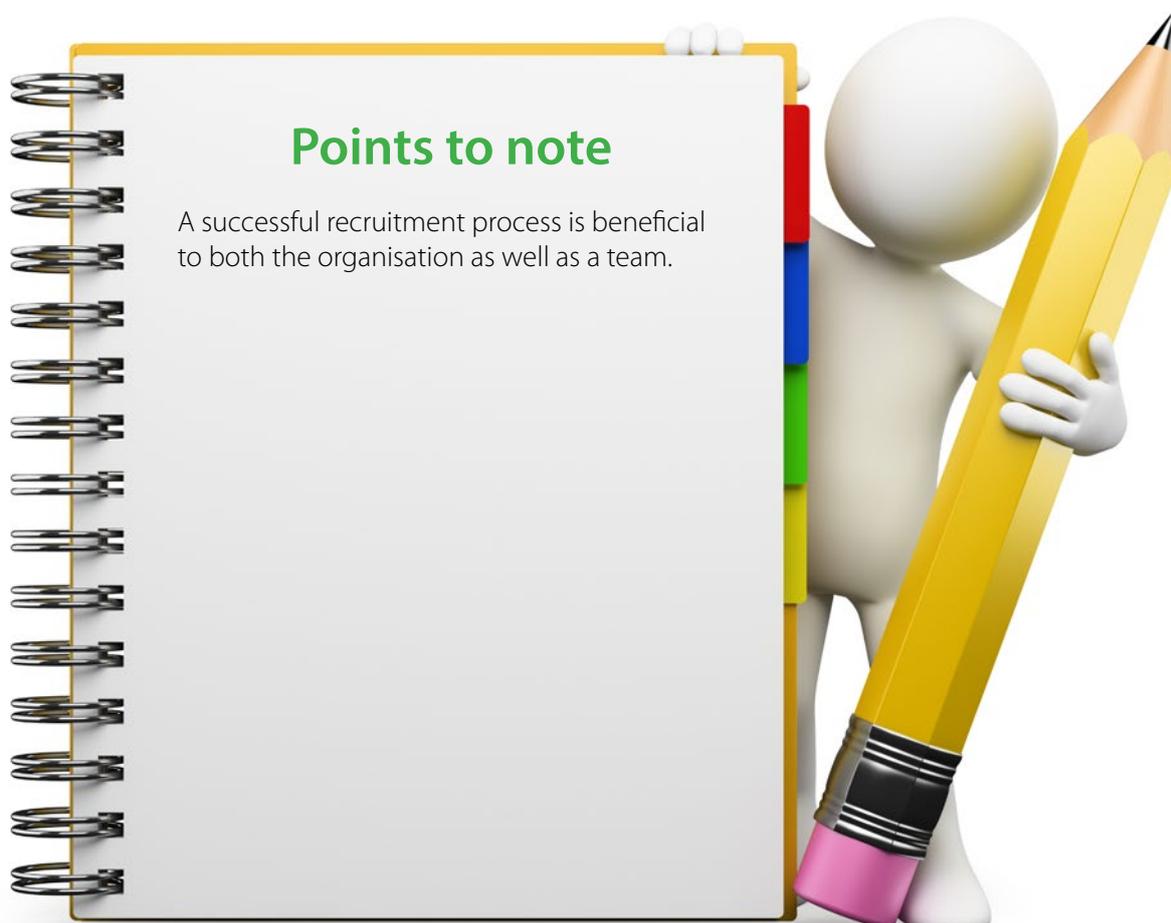
UNIT D1 (H/600/9660)

DEVELOP WORKING RELATIONSHIPS WITH COLLEAGUES

THIS IS AN OPTIONAL UNIT

The purpose of this unit is to provide learners with the knowledge and understanding of how to develop working relationships with colleagues. It also covers the benefits of effective working relationships.

The unit is divided into five outcomes:

1. Understand the benefits of working with colleagues
2. Be able to establish working relationships with colleagues
3. Be able to a act in a professional and respectful manner when working with colleagues
4. Be able to communicate with colleagues
5. Be able to identify potential work-related difficulties and explore solutions.
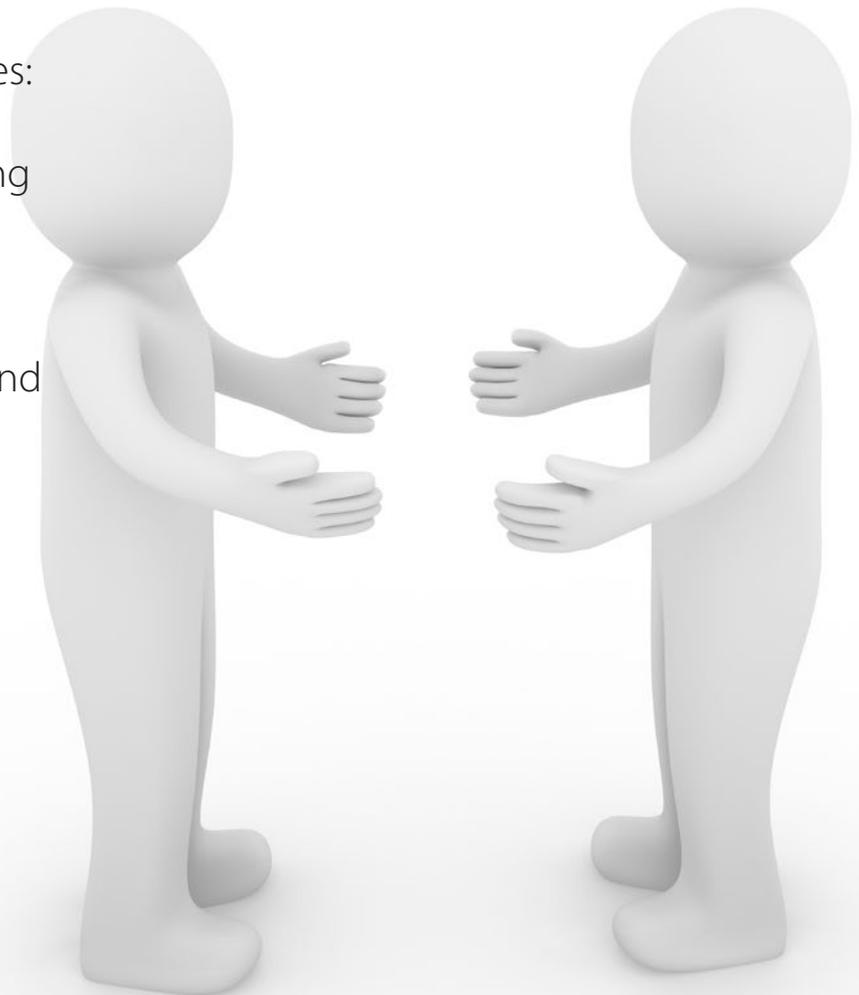
UNIT D1 (H/600/9660)

DEVELOP WORKING RELATIONSHIPSWITH COLLEAGUES

Learning Outcome 1 - Understand the benefits of working with colleagues

Assessment criteria. I can:

1.1   Describe the benefits of productive working relationships

Learning outcome 2 - Be able to establish working relationships with colleagues:

Assessment criteria. I can:

2.1   Identify colleagues within own and other organisations

2.2   Agree the roles and responsibilities for colleagues

Activity

Make a list of colleagues with whom you need to interact and identify ways in which you do this. What could you do to improve the quality of this relationship?

Learning Outcome 3 - Be able to act in a professional and respectful manner when working with colleagues

Assessment criteria. I can:

3.1   Explain how to display behaviour that shows professionalism

Learning Outcome 4 - Be able to communicate with colleagues

Assessment criteria. I can:

4.1   Identify, information to others clearly and concisely

4.2   Explain how to receive and clarify own understanding of information

Learning Outcome 5 - Be able to identify potential work related difficulties and explore solutions

Assessment criteria. I can:

5.1   Identify potential work-related difficulties and conflicts if interest

5.2   Explain how to resolve identified potential difficulties

Did you know?

The role of a team leader is to build effective links. The team leader must act as an ambassador to more senior management on behalf of the team, both communicating messages from senior management to the team and communicating messages from the team to senior management. It is also important that a team leader builds co-operative, constructive and mutually supportive links between their team and those of other teams with which they must do business in order to fulfil the team's objectives.

Key terms/words

Colleague: is someone within your own or another organisation with whom you work either directly or indirectly.

Working relationship: is the professional relationship you have with work colleagues; it should be a relationship of mutual respect, openness, helpfulness and trust. A productive working relationship allows you to discuss openly and frankly what other people need to know, and to contribute upwards (and sideways) without fear of reprisal.

A professional and respectful manner: is one in which you behave in a way that shows respect for the knowledge and skills of others, and their roles and responsibilities in relation to your own. It involves communication that meets the needs of colleagues, is clear as to purpose, is concise and to the point, and is timely.

Conflict of interest: occurs when one or more of the people involved in a decision has a personal, team or organisational stake in the outcome of that decision which, if they do not make this interest clear at the outset, could result in them having undue influence over the decision to the benefit of themselves, their team or organisation.

Codes of Practice: are drawn up by industry experts and provide the benchmark for standards in that industry. They are designed to support professionals in each regulated sector by giving advice and guidance based on real-life experience.

Points to note

It is important that as team leader you are positive about the organisation as a whole, positive about the role of other teams and positive about your own team. One of the great dangers of team work is inter-team conflict and rivalry. The team leader's role is to ensure that there is inter-team co-operation and support and to achieve this you should be positive about the work of other teams, always encouraging your team to consider how they can help other teams and be positive about the organisation as a whole.

UNIT D6 (H/600/9674)

PLAN, ALLOCATE AND MONITOR WORK IN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit helps learners to plan, allocate and monitor work in own area of responsibility, and make any necessary changes to original work plans using SMART goals and objectives and ensuring compliance with any regulatory or statutory requirements.

The unit is divided into four outcomes:

1. Be able to produce a work plan for own area of responsibility
2. Be able to allocate and agree responsibilities with team members
3. Be able to allocate and agree responsibilities with team members
4. Be able to review and amend plans of work for own area of responsibility and communicate changes

UNIT D6 (H/600/9674)

PLAN, ALLOCATE AND MONITOR WORK IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Be able to produce a work plan for own area of responsibility

Assessment criteria. I can:

1.1   Explain the context in which work is to be undertaken

1.2   Identify the skills base and the resources available

1.3   Examine priorities and success criteria needed for the team

1.4   Produce a work plan for own area of responsibility

Learning outcome 2 - Be able to allocate and agree responsibilities with team members

Assessment criteria. I can:

2.1   Identify team members' responsibilities for identified work activities

2.2   Agree responsibilities and SMART (Specific, Measurable, Achievable, Realistic and Time-bound) objectives with team members

Activity

Consider a situation that happened within the workplace where there was a conflict of interest. It could have been something you were involved with or a situation that you knew about. Reflect on this and write some notes on how the outcome was dealt with and what could have been done slightly differently to achieve a better outcome for all.
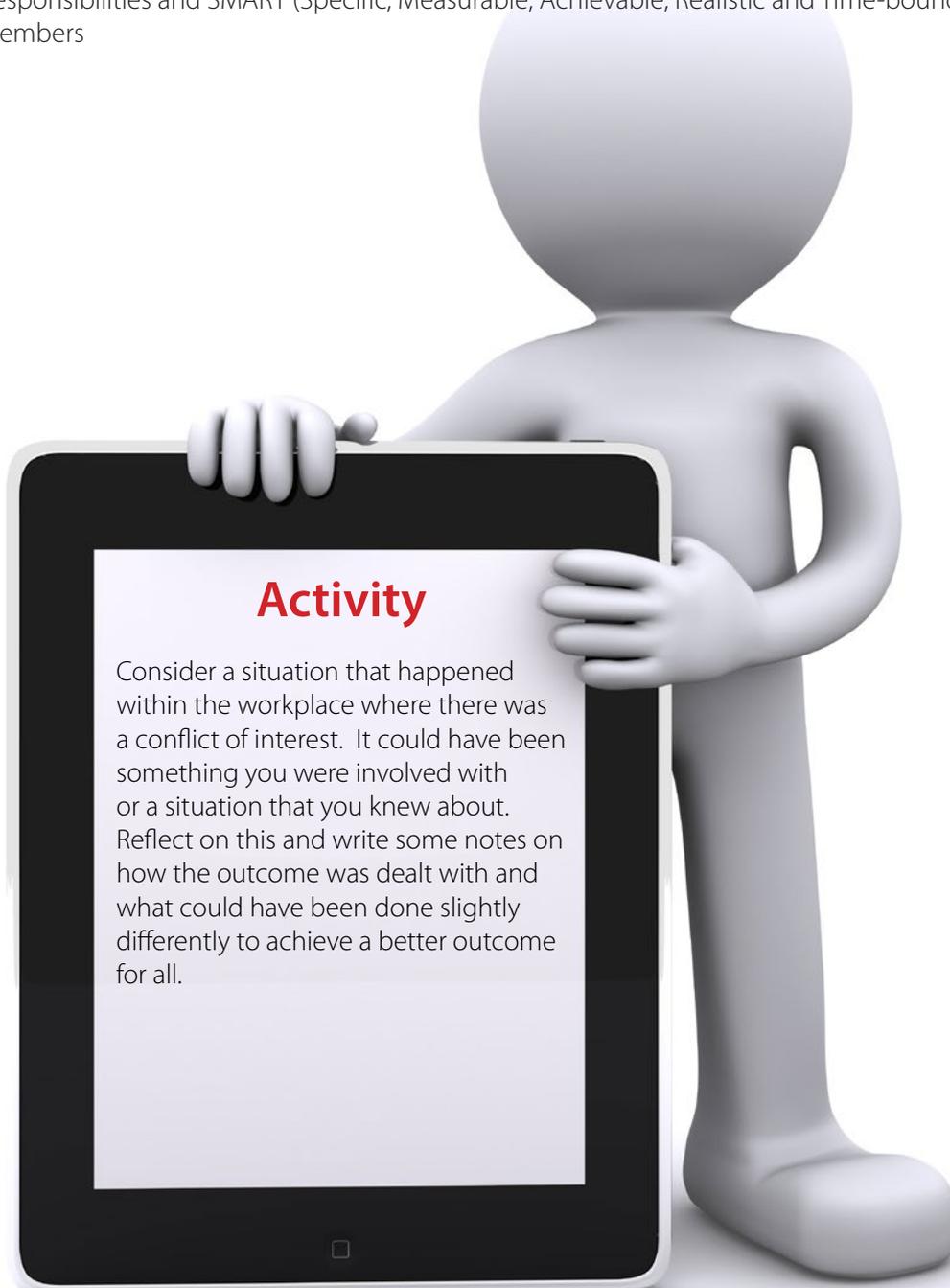
Learning Outcome 3 - Be able to monitor the progress and quality of work in own area of responsibility and provide feedback

Assessment criteria. I can:

3.1 Identify ways to monitor progress and quality of work

3.2 Monitor and evaluate progress against agreed standards and provide feedback to team members

Learning Outcome 4 - Be able to review and amend plans of work for own area of responsibility and communicate changes

Assessment criteria. I can:

4.1 Review and amend work plan where changes are needed

4.2 Communicate changes to team members

Did you know?

SMART objectives can also be referred to as Key Performance Indicators (KPI's) by organisations, meaning the same in terms of completing objectives set by an organisation or team.

Key terms/words

SMART Objectives: these are used in businesses use in order to set Specific, Measurable, Achievable, Realistic and Time-bound objectives for individuals or teams.

Quality Standards: these can take many forms in the workplace. In a team situation it is ensuring that colleagues are aware of the processes and level of work involved to ensure that the quality standards are met within the area of work. Regular feedback in the form of monitoring will be required to ensure that the team are aware of their progress and also that they are working to the correct standards.

Review: part of any managerial role is to analyse current practices and seek to find improvements where possible. In a review these practices will be scrutinised and fed back to the team, with the suggestion that the implementation of the new processes be followed in the near future.
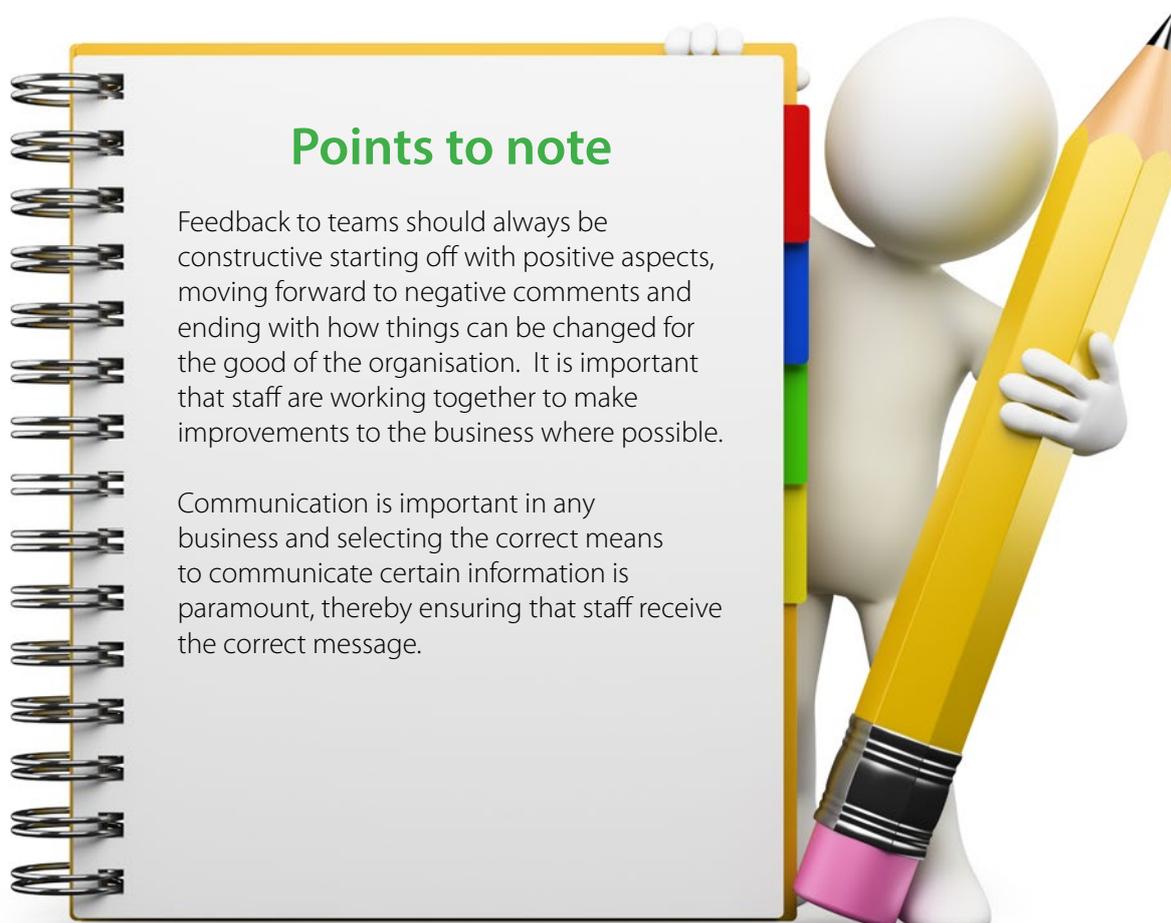
Points to note

Feedback to teams should always be constructive starting off with positive aspects, moving forward to negative comments and ending with how things can be changed for the good of the organisation. It is important that staff are working together to make improvements to the business where possible.

Communication is important in any business and selecting the correct means to communicate certain information is paramount, thereby ensuring that staff receive the correct message.

UNIT D7 (M/600/9676)

SUPPORT LEARNING AND DEVELOPMENT WITHIN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit will enable candidates to demonstrate their understanding of the goals and aspirations of own area of responsibility and the organisation and how they are related. The candidate will be able to use this information to identify development needs within their own team and prioritise them in line with organisational and area needs. It will also develop the candidate's ability to work with team members to identify relevant development opportunities and to monitor and review the plan in line with organisational and area needs.

The unit is divided into four outcomes:

1. Be able to identify the learning needs of colleagues in own area of responsibility
2. Understand how to develop a learning environment in own area of responsibility
3. Be able to support colleagues in learning and its application
4. Be able to evaluate learning outcomes and future learning and development of colleagues

UNIT D7 (M/600/9676)

SUPPORT LEARNING AND DEVELOPMENT WITHIN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Be able to identify the learning needs of colleagues in own area of responsibility

Assessment criteria. I can:

1.1 Identify gaps between requirements of colleagues' current or future work roles and their existing knowledge, understanding and skills.

1.2 Prioritise learning needs of colleagues.

1.3 Produce personal development plans for colleagues in own area of responsibility

Learning outcome 2 - Understand how to develop a learning environment in own area of responsibility

Assessment criteria. I can:

2.1 Explain the benefits of continual learning and development.

2.2 Explain how learning opportunities can be provided for own area of responsibility

Activity

Create a presentation to present to staff informing them about staff development within your organisation, and include examples of how you have benefited from development within the organisation.

Learning Outcome 3 - Be able to support colleagues in learning and its application

Assessment criteria. I can:

3.1   Identify information, advice and guidance to support learning.

3.2   Communicate to colleagues to take responsibility for their own learning.

3.3   Explain to colleagues how to gain access to learning resources.

3.4   Support colleagues to practise and reflect on what they have learned.

Learning Outcome 4 - Be able to evaluate learning outcomes and future learning and development of colleagues

Assessment criteria. I can:

4.1   Examine with each colleague, whether the learning activities undertaken have achieved the desired outcomes.

4.2   Support colleagues when updating their personal development plan

Did you know?

The Investors in People award is about improving business performance through its workforce.   Does your organisation promote this ethos and have this recognition?

Adapted from INVESTORS IN PEOPLE means business, http://www.investorsinpeople.co.uk/growth/?gclid=CNSfnreN1LUCFfLLtAodQm0AaA#
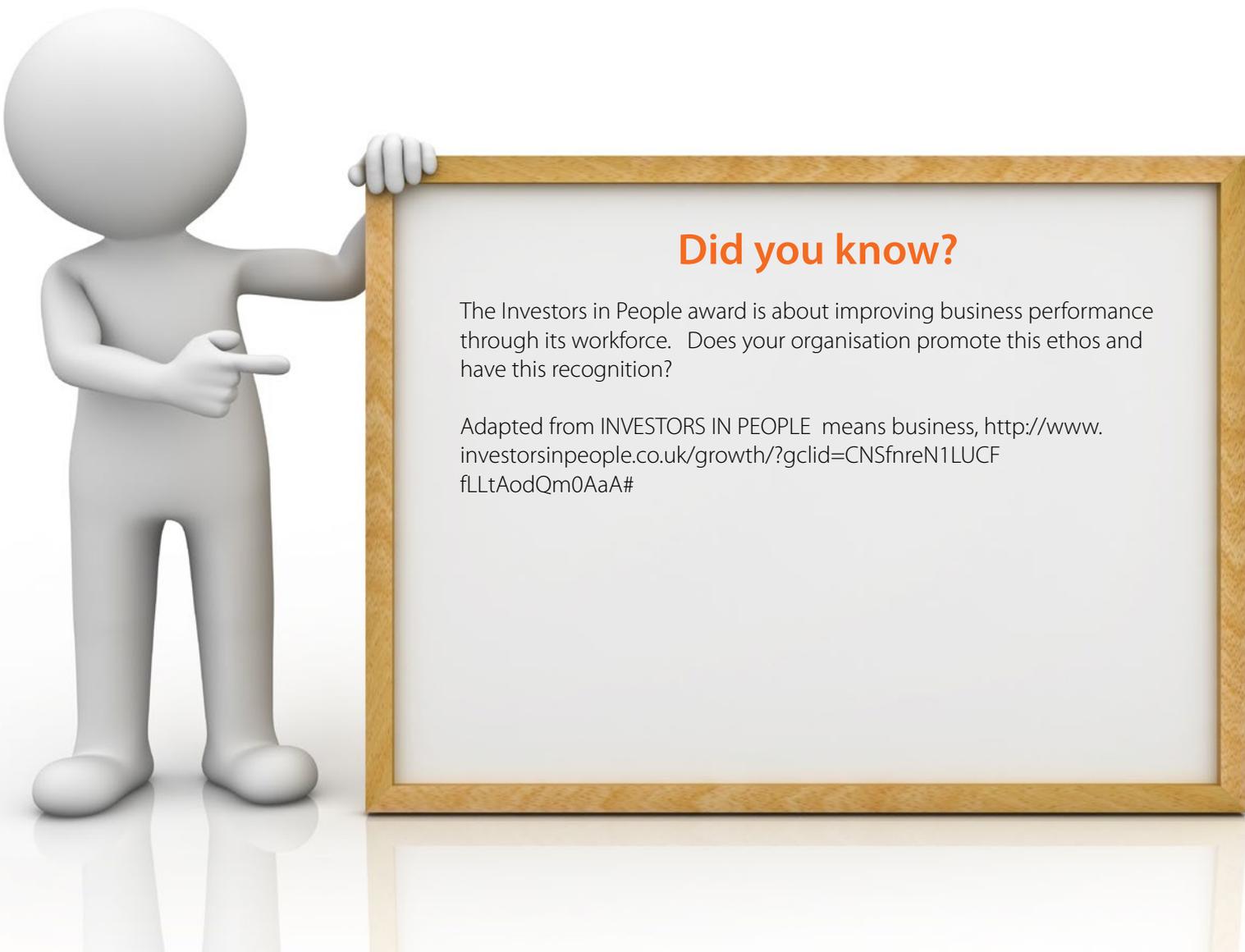
Key terms/words

Learning Environment: creating a suitable learning environment for colleagues is important to show that the organisation wants its employees to continue learning in all different forms. Colleagues may not have learnt new skills or gained new qualifications since their schooling which may not have been a positive experience, so having a designated professional learning environment or programme can only enhance the atmosphere of a business.

Learning: this can take many different forms and certain colleagues may need more encouragement to identify the most recent skills improvements that they have completed or the most relevant qualifications and skills to date.

Staff development: staff may need guidance on the types of staff development that the organisation currently has in place or what activities they could take part in outside of the business to develop their skills further.

Development plans: meetings may need to be arranged in order to discuss individual plans for developing staff, with time scales set for the development activities to be completed, including a review from the staff member of the completed activities.

Points to note

Staff may be sceptical about developing themselves within the business and want to resist the opportunities given to them by the organisation. It is your role to show them how beneficial it can be and will also be to them as individuals.

Reviewing the success of the staff development over a one-year period could be a useful analytical tool involving management.
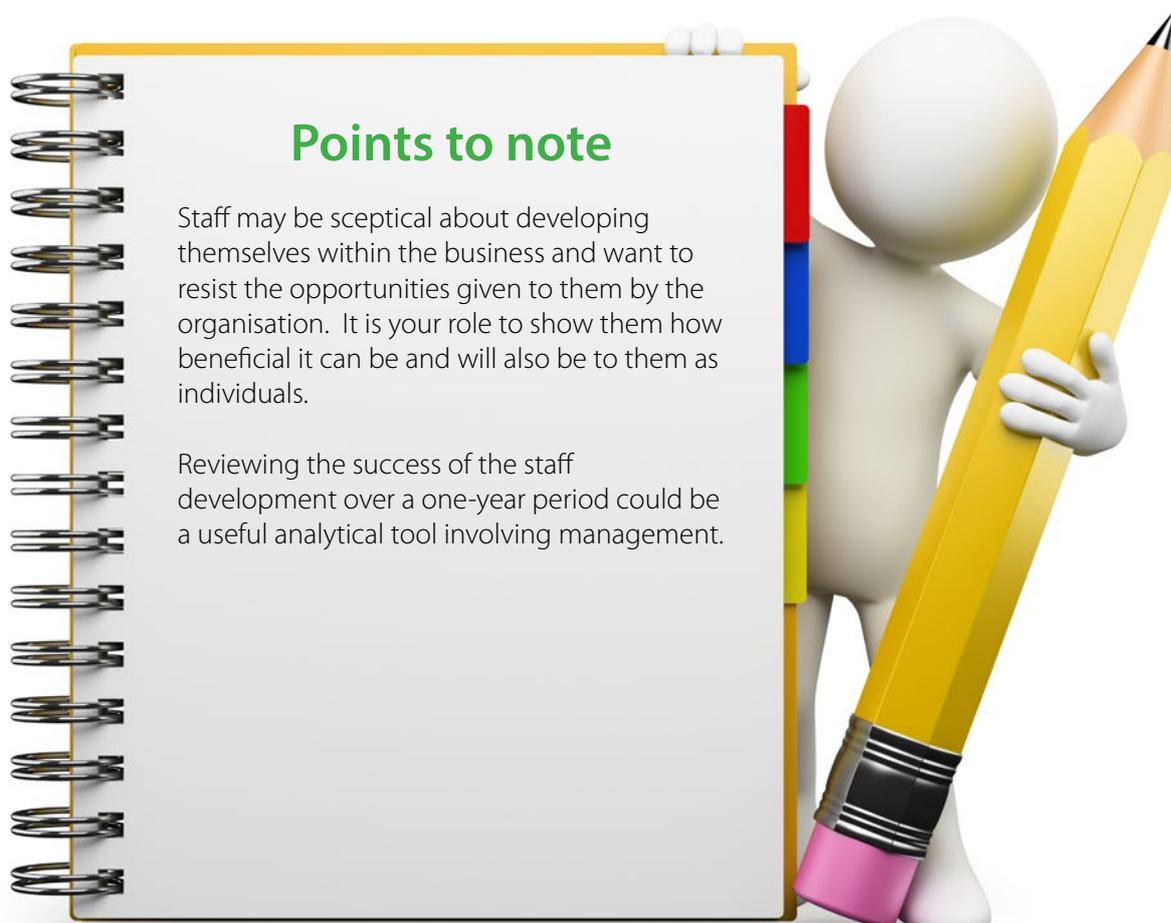
UNIT D8 (F/600/9679)

ADDRESS PERFORMANCE PROBLEMS AFFECTING TEAM MEMBERS

THIS IS AN OPTIONAL UNIT

This unit will ensure that the learner is able to identify, discuss, resolve and record team member performance problems.

The unit is divided into four outcomes:

1. Understand legal requirements, industry regulations, organisational policies and professional codes concerning performance
2. Be able to identify performance problems of team members
3. Be able to discuss performance problems with team members
4. Be able to set a course of action to deal with identified problems with team members
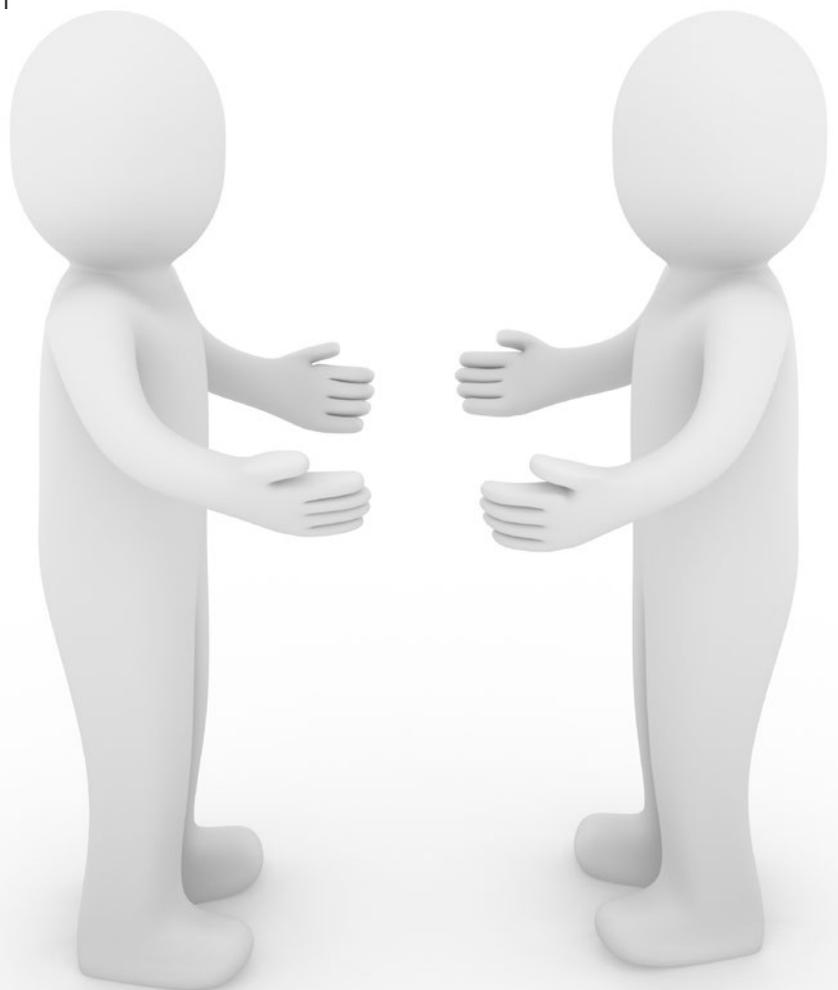
UNIT D8 (F/600/9679)

ADDRESS PERFORMANCE PROBLEMS AFFECTING TEAM MEMBERS

Learning Outcome 1 - Understand legal requirements, industry regulations, organisational policies and professional codes concerning performance

Assessment criteria. I can:

1.1 Identify legal requirements, industry regulations, organisational policies and professional codes concerning performance

1.2 Explain limits of own authority relating to performance problems

Learning outcome 2 - Be able to identify performance problems of team members

Assessment criteria. I can:

2.1 Assess team member's performance against performance criteria.

2.2 Evaluate causes of identified performance problems

Activity

Devise a list of potential performance related issues that you have dealt with in the past and the actual outcomes of this list.
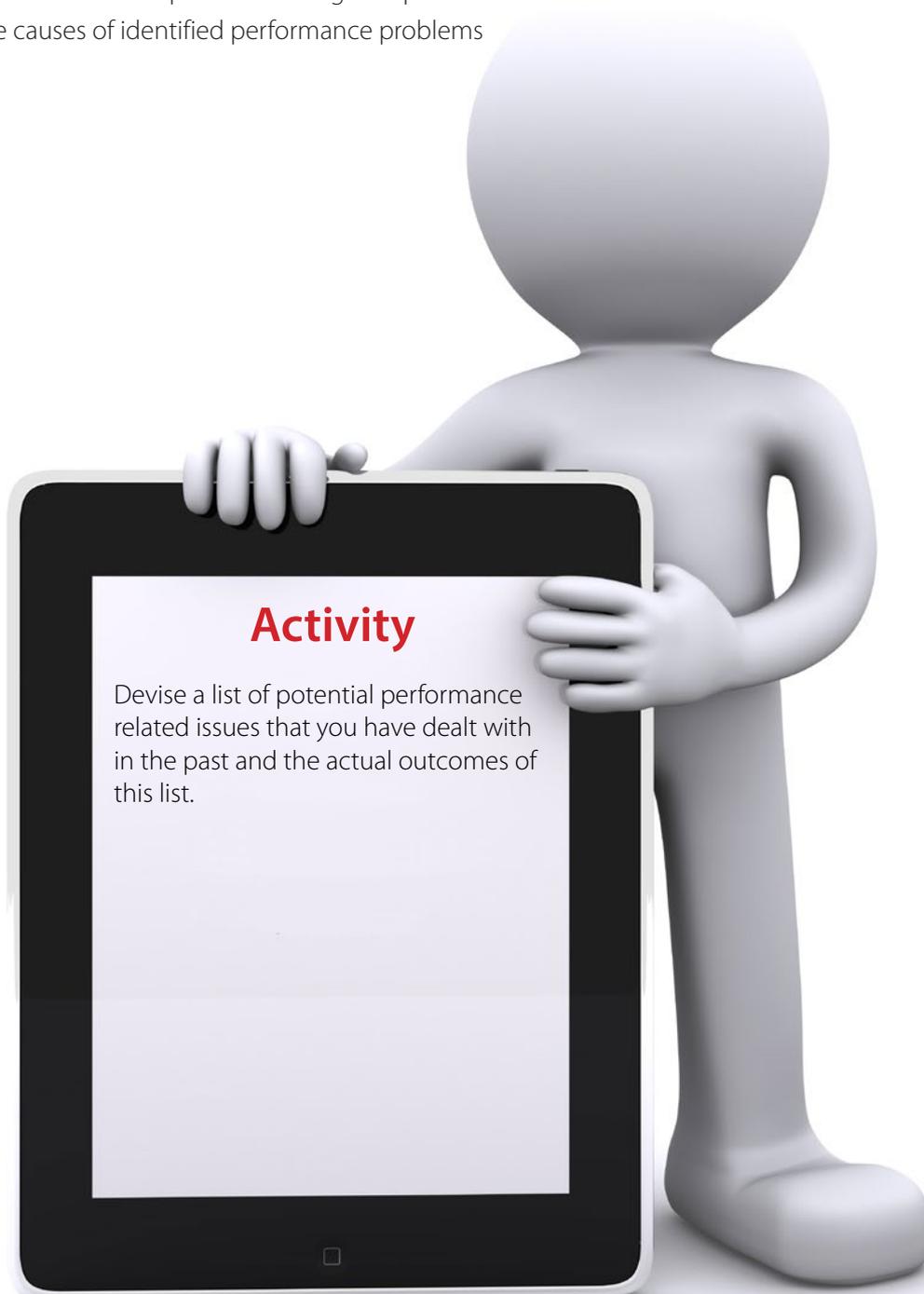
Learning Outcome 3 - Be able to discuss performance problems with team members

Assessment criteria. I can:

3.1   Identify performance problems to the attention of team members concerned

3.2   Explain an organisation's policies for managing performance problems to the team member concerned

3.3   Develop a confidential record of discussions with team members about problems affecting their performance

Learning Outcome 4 - Be able to set a course of action to deal with identified problems with team members

Assessment criteria. I can:

4.1   Explain and discuss alternative courses of action with the team member concerned.

4.2   Identify the course of action with the team member concerned.

4.3   Review and revise confidential records of discussions with team members about problems affecting their performance

Did you know?

Gordon Whyte, Managing Director, Interim stated that 'Handling poor performance in the correct way can help employees to enjoy their job once again, improve overall productivity and send out a positive message to other employees.'

Adapted from How to tackle poor performance in the workplace, http://biegroupltd.com/blogs/how-to-tackle-poor-performance-in-the-workplace/

Key terms/words

Performance problems: if a staff member is not completing their job role in the most effective way, then this can affect the performance of the team, which could potentially cost the business in terms of time and money. Any performance issues should be addressed as there could be individual reasons for this.

Resolve: trying to come to an agreement to make a situation better is what organisations strive to achieve when resolving any issues to do with a team member.

Legal requirements: Management will need to check any legal documentation which may determine how a situation can be resolved or even how the procedure should be followed, in order to gain the maximum from staff members.

Action points: having short-term targets or goals to achieve will enhance a team when success is achieved, making the individuals more liable to want to achieve even more, thereby creating a positive working atmosphere within the workplace.

Points to note

Recording outcomes are important to show the employee in the future how situations can be turned around into something positive – providing the outcome is positive of course!

Employees will look to management for guidance and encouragement, so it is important to try to show this when you can and at significant times in terms of the business.
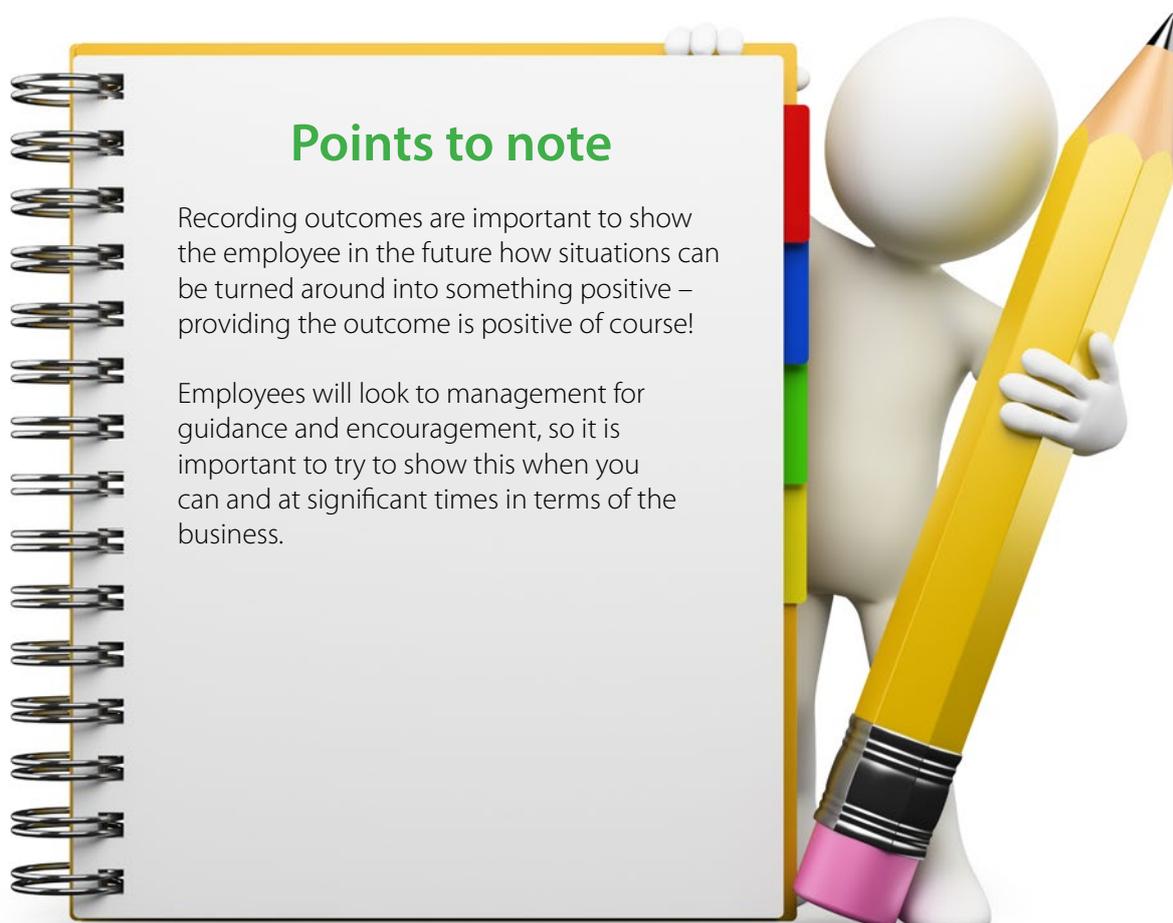
UNIT D9 (F/600/9682)

BUILD, SUPPORT AND MANAGE A TEAM

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to develop, manage and disband a team through a project cycle.

The unit is divided into five outcomes:

1. Understand the purpose and required attributes of a team and select those that match the team's requirements
2. Be able to induct team members and communicate their roles and responsibilities
3. Understand how to support team development
4. Be able to manage team performance
5. Understand how to disband a team

UNIT D9 (F/600/9682)

PROVIDE LEADERSHIP AND DIRECTION FOR OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Understand the purpose and required attributes of a team and select those that match the team's requirements

Assessment criteria. I can:

1.1   Explain the role of a team in the achievement of a specific project or activity

1.2   Identify the attributes needed within the team to achieve its objectives

1.3   Analyse the skills and knowledge of potential and current team members against the identified needs

1.4   Identify individuals whose attributes most closely match the identified requirements

Learning outcome 2 - Be able to induct team members and communicate their roles and responsibilities

Assessment criteria. I can:

2.1   Communicate project aims and objectives to team members.

2.2   Explain how to introduce team members to each other and discuss each member's role and responsibilities

Activity

Create a fun one-hour team challenge for all colleagues in your workplace to complete. Colleagues at all levels should partake. Evaluate the outcomes with the staff and what they have learnt from the experience.
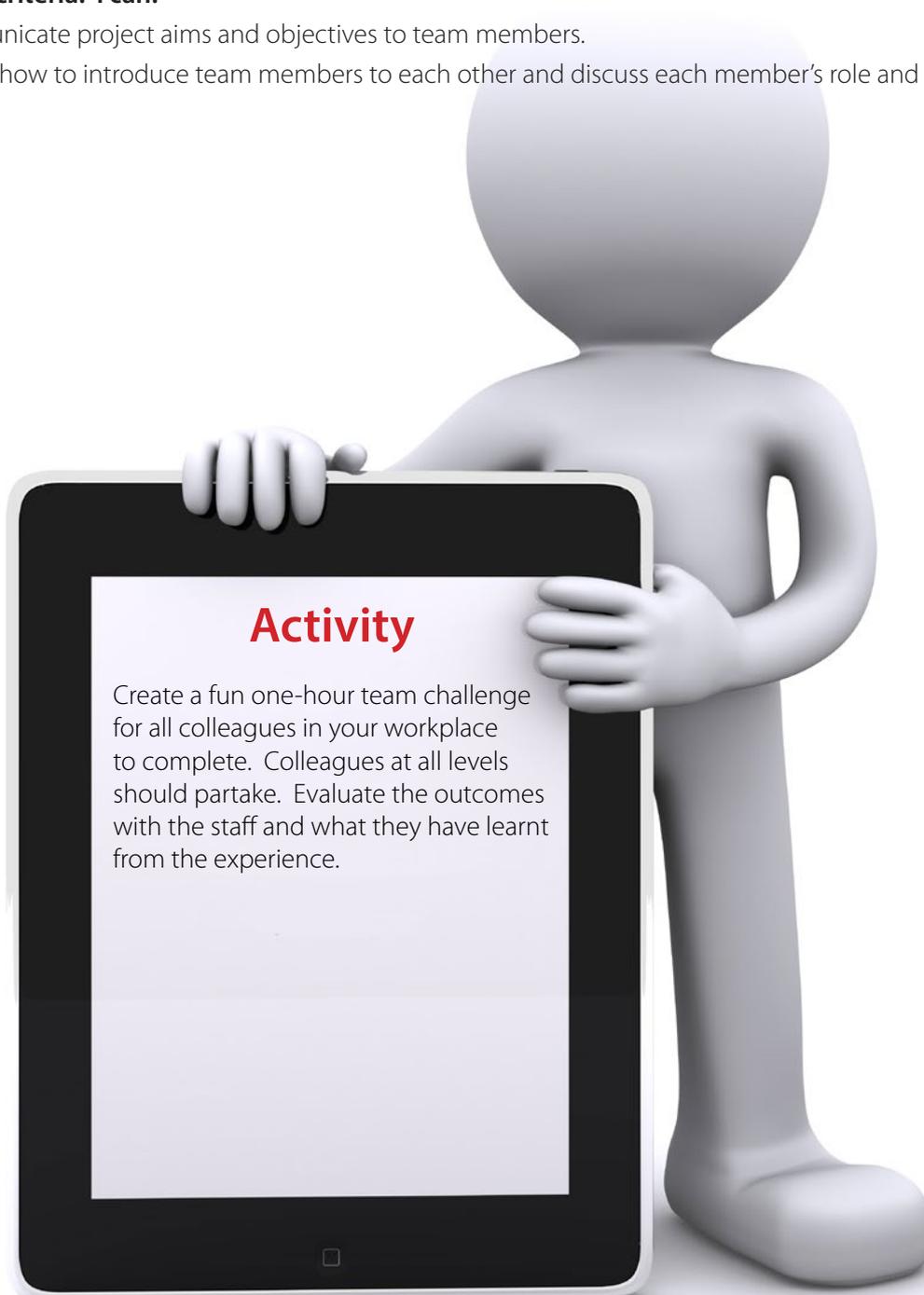
Learning Outcome 3 - Understand how to support team development

Assessment criteria. I can:

3.1   Identify the stages of team development.

3.2   Explain how to resolve conflict between team members.

3.3   Describe methods of encouraging team members to share knowledge and skills to achieve project objectives.

3.4   Explain how to encourage open communication, trust and respect between team members

Learning Outcome 4 - Be able to manage team performance

Assessment criteria. I can:

4.1   Monitor and review the performance of a team against its purpose

4.2   Communicate project developments to team members and support any change in roles or responsibilities

4.3   Communicate team and individual successes to all team members

Learning Outcome 5 - Understand how to disband a team

Assessment criteria. I can:

5.1   Explain how to prepare team members for project conclusion

5.2   Describe how a team is disbanded

Did you know?

Susan-M-Heathfield states that the key to successful team work is "the team understands the goals and is committed to attaining them. This clear direction and agreement on mission and purpose is essential for effective team work. This team clarity is reinforced when the organization has clear expectations for the team's work, goals, accountability, and outcomes."

Adapted from Tips for Better Team Work? © Copyright Susan M. Heathfield. http://humanresources.about.com/od/teambuilding/f/team_work.htm

Key terms/words

Project Cycle: a project is a number of different tasks completed by a group to a given goal, normally within a certain time frame requiring a variety of different skills and competences shown by the team members.

Attributes within a team: teams will have a number of different personalities who will have different skills and knowledge in a variety of areas. This is what makes a successful team. Identifying the best suited attributes to roles within the team is one role of the leader, ensuring that they get the best of their team at all times.

Team roles and responsibilities: team members are often aware of their strengths and depending on the situation will adopt certain roles and responsibilities in a given situation. Managing this scenario can be challenging if colleagues are wanting similar roles, so the leader will need to step in and help if need be.

Manage team performance: ensuring team morale is high at all times is difficult so in any project cycle the manager should ensure that completing certain objectives on time is celebrated and in more challenging times, the focus is still positive with the end goal in sight.

Points to note

Building a successful team takes time. Supporting and managing the team is crucial if you are to ensure that the team works well together, producing the team project within the agreed time frame.
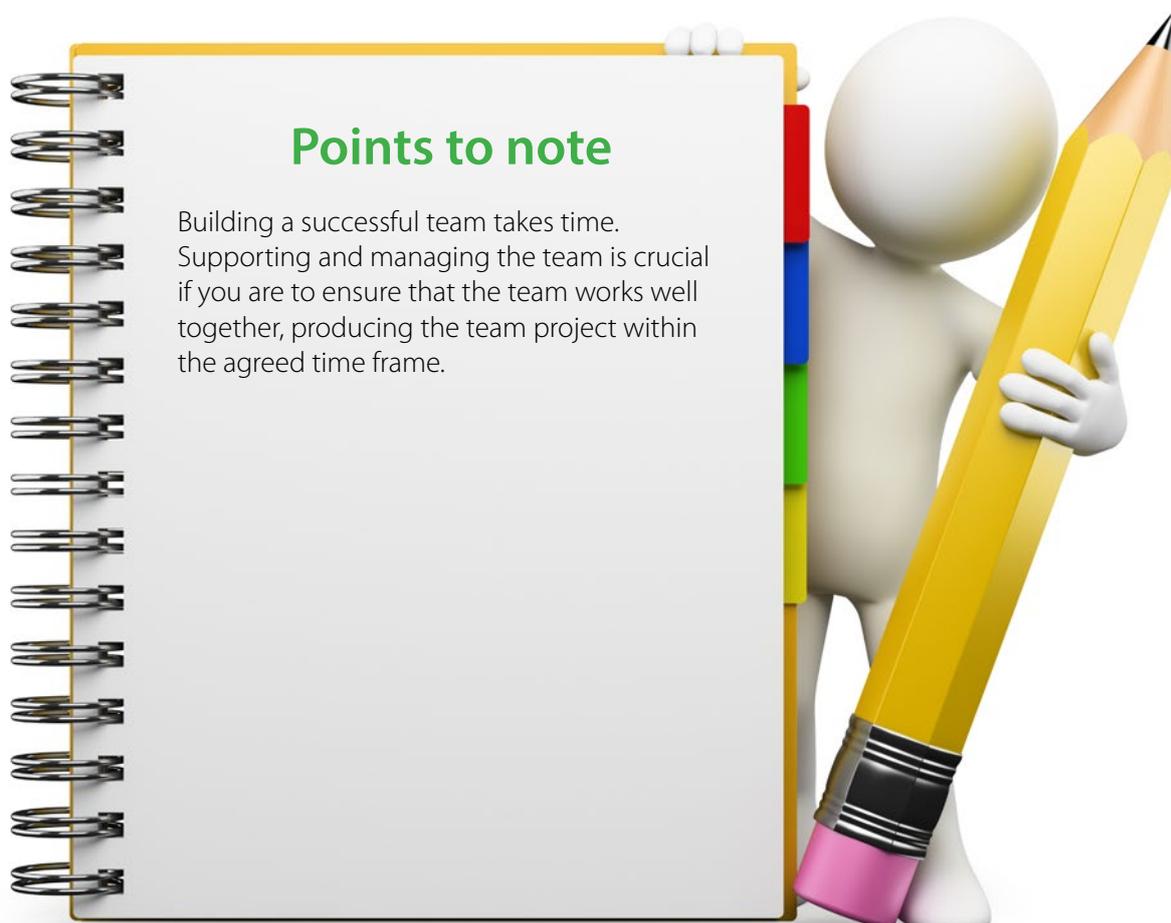
UNIT D10 (R/600/9685)

MANAGE CONFLICT IN A TEAM

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners understand how to identify potential and actual conflicts within a team and take action to resolve them.

The unit is divided into four outcomes:

1. Be able to support team members understanding of their role and position within a team
2. Be able to take measures to minimise conflict within a team
3. Be able to understand how to encourage team members to resolve their own conflicts
4. Be able to understand legal and organisational requirements concerning conflict.

UNIT D10 (R/600/9685)

MANAGE CONFLICT IN A TEAM

Learning Outcome 1 - Be able to support team members understanding their role and position within a team

Assessment criteria. I can:

1.1   Communicate to team members the standards of work and behaviour expected of them

1.2   Explain how team members can work together and support each other

Learning outcome 2 - Be able to take measures to minimise conflict within a team

Assessment criteria. I can:

2.1   Identify issues with organisational structures, systems or procedures that are likely to give rise to conflict

2.2   Identify potential conflict between team members

2.3   Explain action required to avoid potential conflict and agree strategies for conflict resolution

Activity

Use 'Active Listening Skills' when you next have a discussion with your manager or a trusted colleague, and ask for feedback to help you develop these skills further. They are a test of your ability to listen attentively, to prioritise information and to question skilfully for clarification. These skills are especially useful in conflict resolution.
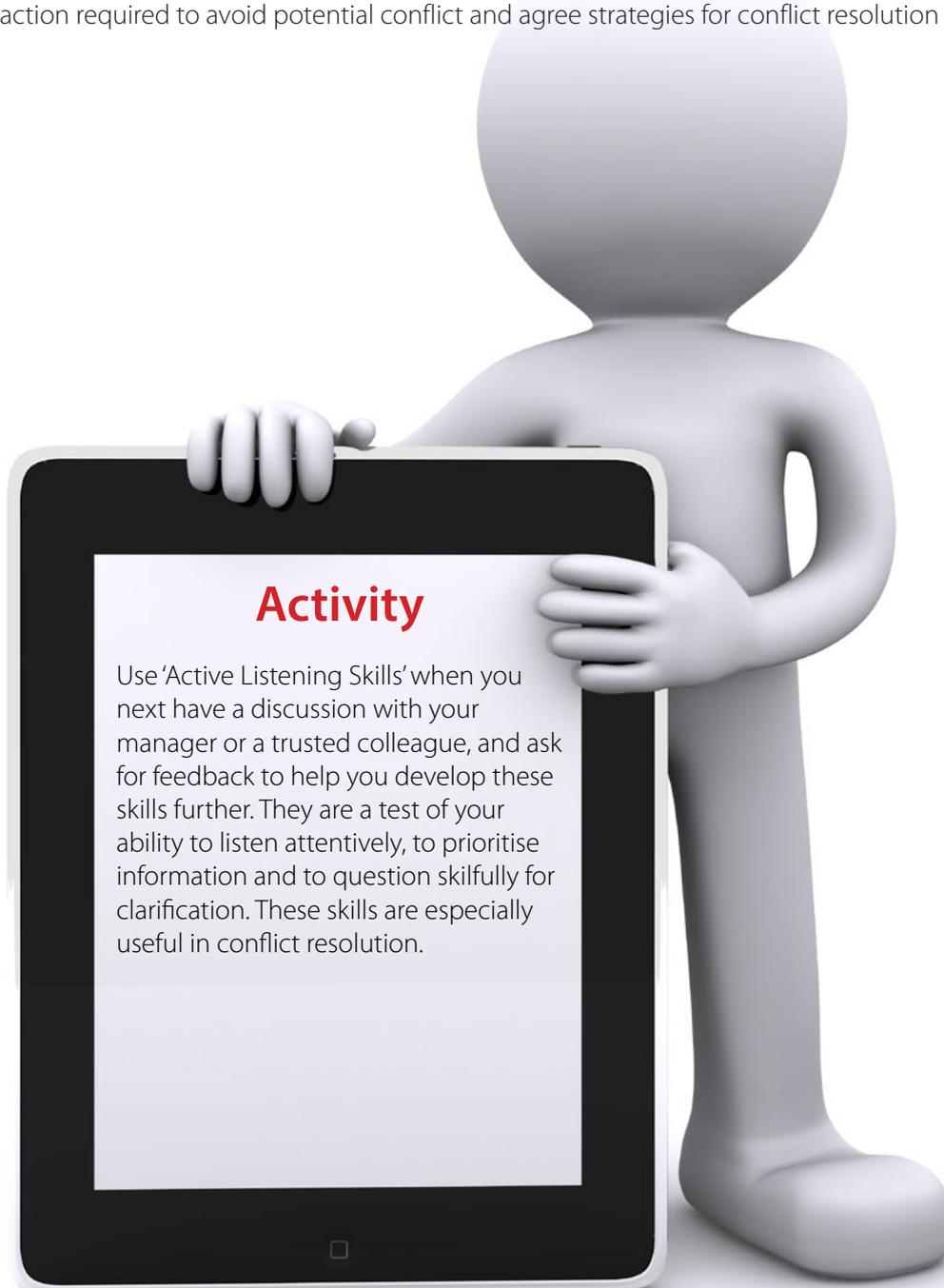
Learning Outcome 3 - Be able to understand how to encourage team members to resolve their own conflicts

Assessment criteria. I can:

3.1   Explain how team members can be encouraged to identify and resolve their own problems and conflicts

3.2   Explain how respect can be developed and maintained between team members

Learning Outcome 4 - Be able to understand legal and organisational requirements concerning conflict

Assessment criteria. I can:

4.1   Explain legal and organisational requirements concerning conflict in own team

4.2   Explain how to maintain complete, accurate and confidential records of conflict and their outcomes

Did you know?

Teams are made up of people with different cultures, skills, attitudes and personalities, strengths, weaknesses, needs, interpretations and goals, and that each has an important role to play if the team is to be really effective. Effective teams view differences of opinions as positive learning opportunities; they establish procedures that allow each member's opinion to be shared and discussed constructively. Members react rationally and listen actively to the opinions expressed, they try to identify the root causes of conflict and what each party is trying to achieve. They identify specific areas of agreement and disagreement, thus avoiding a common mistake of allowing conflict problems to be generalised and therefore harder to solve. Members empathise with another's position, they use positive feedback techniques to evaluate and value each person's contribution and they strive to reach agreement on a step forward, no matter how small.

Key terms/words

Standards of Work and Behaviour: those minimum requirements set by the organisation and/or the team itself, to which every team member must adhere. For example, adherence to Health and Safety regulations, the time taken to complete a task and the quality of product to be achieved, treating others with respect or being at work on time. In some organisations this may also include how people dress for work.

Conflict: a struggle between opposing forces. Conflict may arise when two or more people have apparently irreconcilable attitudes or opinions. If not addressed this may lead to friction within the team, and opposition to, or even the sabotaging of, new ideas. Where it is dealt with positively, conflict can be a good source of creative problem-solving.

Conflict resolution: the solving of the problems leading to conflict.

Points to note

Difference may be the team's strength but is also a potential breeding ground for argument and conflict. Conflict is accompanied by a high level of anxiety and stress for those involved. You need to be aware of the early signs of potential conflict (e.g. non-typical mistakes, absenteeism, an 'atmosphere') so that you may take prompt action. You should remain impartial at all times and maintain accurate records in case evidence is needed at formal tribunals.

UNIT D11 (Y/600/9686)

LEAD AND MANAGE MEETINGS

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to prepare for, lead and follow up issues identified in meetings.

The unit is divided into four outcomes:

1. Be able to prepare to lead a meeting
2. Be able to manage meeting procedures
3. Be able to chair a meeting
4. Be able to undertake post-meeting tasks.

UNIT D11 (Y/600/9686)

LEAD AND MANAGE MEETINGS

Learning Outcome 1 - Be able to prepare to lead a meeting

Assessment criteria. I can:

1.1   Perform activities needed to be carried out in preparation for leading a meeting

1.2   Produce documentation in support of activities

Learning outcome 2 - Be able to manage meeting procedures

Assessment criteria. I can:

2.1   Identify any formal procedures that apply in own organisation

Activity

After your next meeting reflect on how well the meeting went and what could have been managed better. Make a list of what you might do when planning your next meeting to minimise problems and to make it more effective.

Learning Outcome 3 - Be able to chair a meeting

Assessment criteria. I can:

3.1   Manage the agenda in co-operation with participants to ensure meeting objectives are met

3.2   Produce minutes of the meeting and allocate action points after discussions

Learning Outcome 4 - Be able to undertake post-meeting tasks

Assessment criteria. I can:

4.1   Explain that the minutes of the meeting provide an accurate record of proceedings

4.2   Communicate and follow up meeting outcomes to relevant individuals

4.3   Evaluate whether the meeting's objectives were met and identify potential improvements
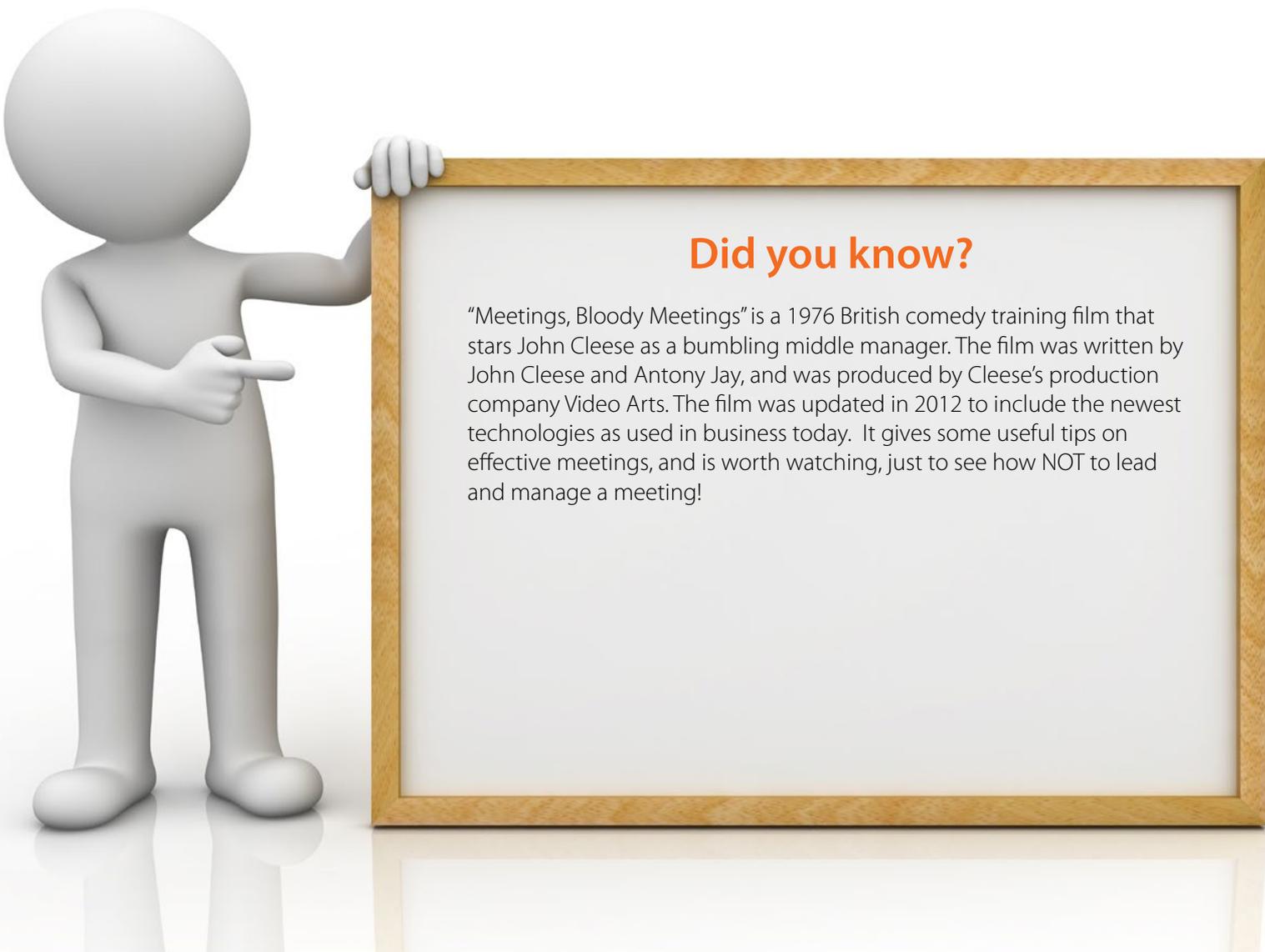
Did you know?

"Meetings, Bloody Meetings" is a 1976 British comedy training film that stars John Cleese as a bumbling middle manager. The film was written by John Cleese and Antony Jay, and was produced by Cleese's production company Video Arts. The film was updated in 2012 to include the newest technologies as used in business today. It gives some useful tips on effective meetings, and is worth watching, just to see how NOT to lead and manage a meeting!

Key terms/words

Meeting: a formal coming together of colleagues to share information and make decisions.

Formal Procedures: those procedures required by the organisation to ensure that meetings are sanctioned, run in a proper manner and recorded according to agreed organisation convention or protocols.

Meeting outcomes: may include the decisions and actions agreed at the meeting (direct outcomes), and the maintaining or improving of relationships and trust between colleagues (indirect outcomes).

Stakeholder: someone with an interest in the meeting and its outcomes.

Points to note

Meetings normally require a process leader, someone who takes the chair and manages the meeting. It is the chair of the meeting who is responsible for ensuring that the time, venue and purpose of the meeting are communicated to all the people who should be invited. They are also responsible for ensuring that the meeting is well planned and with clear objectives, that each item on the agenda is given sufficient time to allow for necessary discussion, that interruptions, criticisms and conflict are dealt with, that decisions are agreed in accordance with protocols and that an accurate record is made of the meeting's outcomes. They are also responsible for ensuring that the meeting ends on time and with the agenda completed; failure to do so shows a lack of respect for the time and efforts of other colleagues. Ensure that any actions agreed are followed up.

Unless there are decisions to be made, meetings are rarely an effective use of time; it may be better to communicate information in other ways.

UNIT D12 (H/600/9688)

PARTICIPATE IN MEETINGS

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to prepare for, take part in and communicate information arising from meetings.

The unit is divided into three outcomes:

1. Be able to prepare for a meeting
2. Be able to participate in a meeting
3. Be able to communicate information to relevant stakeholders.

UNIT D12 (H/600/9688)

PARTICIPATE IN MEETINGS

Learning Outcome 1 - Be able to prepare for a meeting

Assessment criteria. I can:

1.1   Identify own strengths and ability to lead in a leadership role

1.2   Evaluate strengths within own area of responsibility

Learning outcome 2 - Be able to participate in a meeting

Assessment criteria. I can:

2.1   Contribute to meeting discussions using evidence to support own opinions.

2.2   Acknowledge other viewpoints presented at meeting.

2.3   Seek clarification or confirmation of own understanding of outcomes.

Activity

After the next meeting in which you participate, ask a trusted colleague who also attended the meeting to give you some feedback on your participation. Take notes and then identify how you might improve your participation in future meetings.

Learning Outcome 3 - Be able to communicate information to relevant stakeholders

Assessment criteria. I can:

3.1   Communicate information from the meeting to those who have an interest, in line with any organisational protocol

Did you know?

The key to participating more effectively in other people's meetings is to take your share of responsibility for the success of the meeting.

It is important to notify the leader of the meeting, in advance, of any issues or items not already on the agenda that you may wish to discuss, explaining their relevant urgency and importance in the light of other agenda items. Remember, they have spent time planning the agenda and allocating time for each item so, respect their decision if they refuse to allow time for this, and ask if your issues may be placed on the agenda for the following meeting.

Key terms/words

Meeting: a formal coming together of colleagues to share information and make decisions.

Participate: use 'active listening' skills, take part in discussions and decision-making.

Stakeholder: someone with an interest in the meeting and its outcomes

Points to note

If you are not going to participate in the discussions or decision-making, then attending the meeting is a waste of both your own time and that of your colleagues.

If you are attending a meeting, ensure that you respect the time of other attendees by being well prepared, attentive, concise and respectful. Speak briefly and to the point as time is limited, and other people have things to say, too. Keep to the agenda and don't bring up unrelated topics or issues. Offer constructive feedback, remembering the golden rule of feedback, "Criticize actions and ideas, not people." Perform follow-up responsibilities on time, make sure you take whatever action is necessary and report as requested to the meeting leader and/ or other participants in a timely manner.

Your role in meetings may be to represent your team. You therefore need to ensure that, if appropriate, you have consulted them about any issues on the agenda that may impact on them or their work, and have a clear understanding of their views.

UNIT D13 (D/600/9690)

SUPPORT INDIVIDUALS TO DEVELOP AND TAKE RESPONSIBILITY FOR THEIR PERFORMANCE

THIS IS AN OPTIONAL UNIT

This unit aims to enable the candidate to identify the standard of performance required by individuals within their area of responsibility, recognise areas for improvement and communicating these in a supportive and constructive manner to the individual and support them in the creating a development plan. The candidate will also provide support in accessing relevant training and development needs and carryout monitoring activity to measure actual progress against the development plan.

The unit is divided into four outcomes:

1. Be able to agree their performance development needs with an individual
2. Be able to understand how to help an individual create a development plan
3. Be able to support an individual in implementing their development plan
4. Be able to evaluate an individual's progress against a development plan and provide feedback for continual performance improvement

UNIT D13 (D/600/9690)

SUPPORT INDIVIDUALS TO DEVELOP AND TAKE RESPONSIBILITY FOR THEIR PERFORMANCE

Learning Outcome 1 - Be able to agree their performance development needs with an individual

Assessment criteria. I can:

1.1   Explain the standards of performance required for current or future role with an individual

1.2   Identify and agree the performance development needs for the individual

Learning outcome 2 - Be able to understand how to help an individual create a development plan

Assessment criteria. I can:

2.1   Identify options available to support an individual in meeting desired standards of performance

2.2   Explain specific actions needed to achieve objectives

2.3   Explain the process for an individual to create a development plan
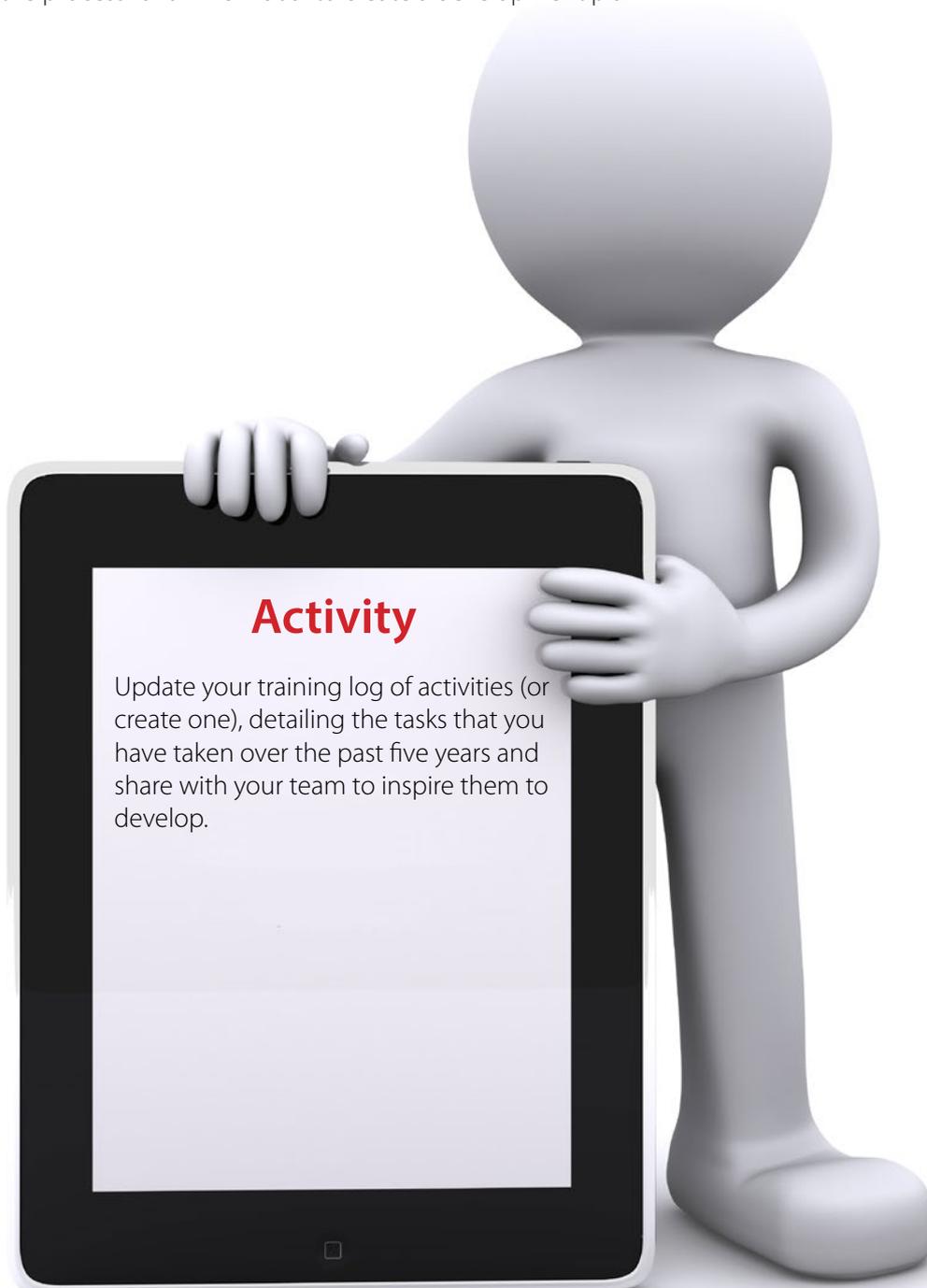
Activity

Update your training log of activities (or create one), detailing the tasks that you have taken over the past five years and share with your team to inspire them to develop.

## Learning Outcome 3 - Be able to support an individual in implementing their development plan

Assessment criteria. I can:

3.1 Describe the opportunities provided for an individual to improve performance

3.2 Explain the outcome to an individual for improved performance

Learning Outcome 4 - Be able to evaluate an individual's progress against a development plan and provide feedback for continual performance improvement

Assessment criteria. I can:

4.1 Monitor and evaluate an individual's progress against their development plan.

4.2 Implement feedback to make development plan revisions.

4.3 Explain how to encourage individuals to take responsibility for continuing their performance development

Did you know?

Distance learning methods may cost a business less in terms of time, travel and employees away from their work, but face-to-face training, workshops and coaching methods seem to be preferred more by individuals.

Adapted from NLP for Business Learners, © Dianne Lowther. http://www.brilliantminds.co.uk/news/personal-and-professional-development---survey-results

Key terms/words

Personal Development: evidence of you enhancing your skills and knowledge within your chosen career to give yourself opportunities to develop within the organisation.

Identifying opportunities: colleagues may need assistance (particularly if they are unsure or new to the profession) in searching for the different type of activities that they could complete when considering developing themselves within the workplace. You many need to advise them in this situation.

Continual performance improvement: staff may consider that they have completed many CPD opportunities in the past and that they do not need to partake in any more. As a manager, you will need to ensure that all staff take responsibility for continuously developing, as technology and systems do change and staff will need to be kept up-to-date with such changes

Taking responsibility: employees will look to you for advice and guidance on certain aspects of training. If you are to be seen taking responsibility for your own improvements such as completing this NVQ, they should want to follow your lead and take responsibility for their own developments.

Points to note

Providing positive feedback to your teams individually about their personal developments will help recognise that you value their efforts and want to celebrate their achievements.

Creating an individual development plan with each colleague will help identify where needs are not being met and work out how they can be met in the future, for the good of the employee and organisation.
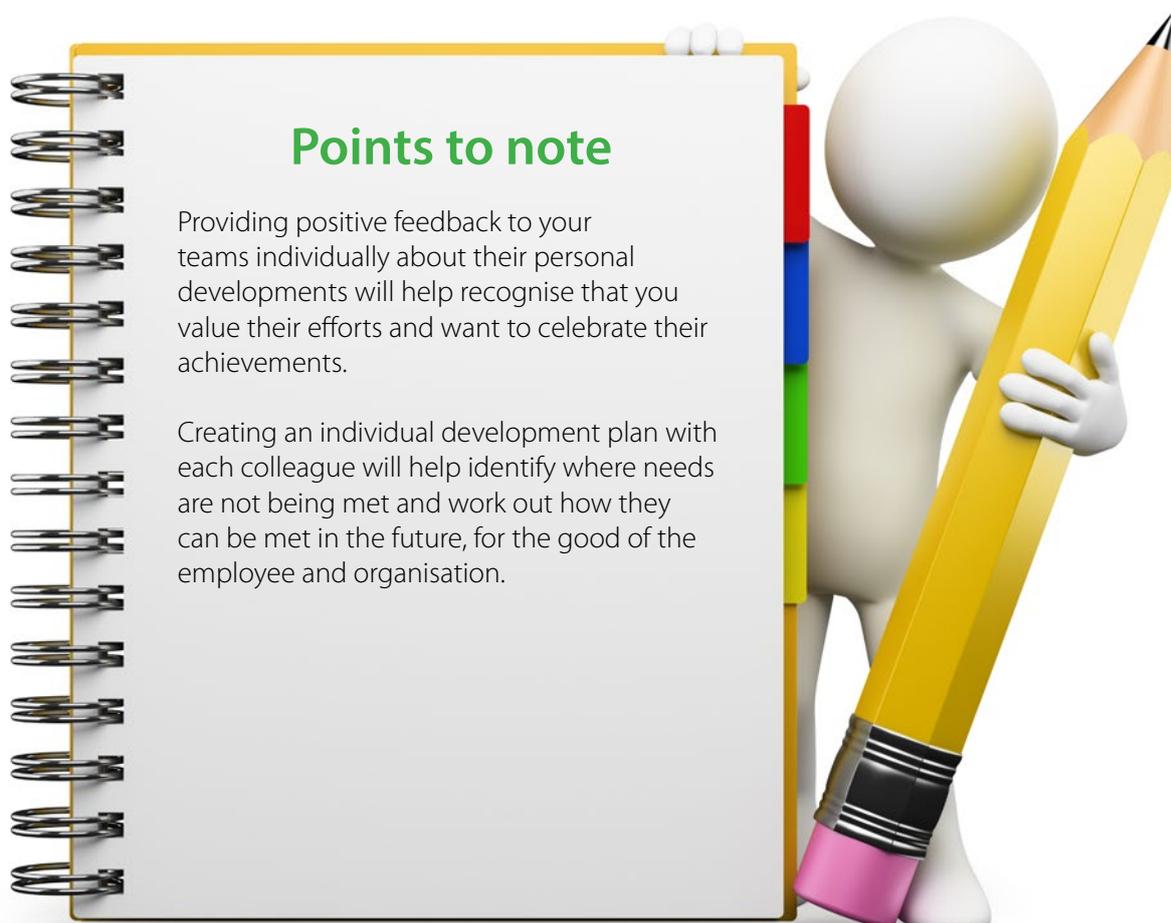
UNIT D14 (H/600/9691)

KNOW HOW TO FOLLOW DISCIPLINARY PROCEDURES

THIS IS AN OPTIONAL UNIT

This unit will enable candidates to demonstrate their understanding of regulatory, statutory and organisational requirements in respect of formal and informal disciplinary procedures. It will also develop candidates in the organisation and management of disciplinary activity which they may face in the work place to ensure that they deal with it in an appropriate manner to protect the interests of the individual and the organisation.

The unit is divided into four outcomes:

1. Be able to understand performance expectations of an organisation
2. Be able to identify and use communication methods to assess potential cases of misconduct or unsatisfactory performance
3. Be able to know how to deal informally with cases of minor misconduct or unsatisfactory performance
4. Be able to follow an organisation's formal disciplinary procedure

UNIT D14 (H/600/9691)

KNOW HOW TO FOLLOW DISCIPLINARY PROCEDURES

Learning Outcome 1 - Be able to understand performance expectations of an organisation

Assessment criteria. I can:

1.1   Explain an organisation's required standards of conduct and performance

1.2   Explain an organisation's formal disciplinary procedure

Learning outcome 2 - Be able to identify and use communication methods to assess potential cases of misconduct or unsatisfactory performance

Assessment criteria. I can:

2.1   Explain how to identify when an individual's performance falls below organisational standards.

2.2   Identify communication methods used to gather information on potential cases of misconduct or unsatisfactory performance.

Activity

Familiarise yourself with the organisations disciplinary procedures and create flow diagrams of three different scenarios where you have had to refer to the documentation demonstrating your knowledge of the procedures.
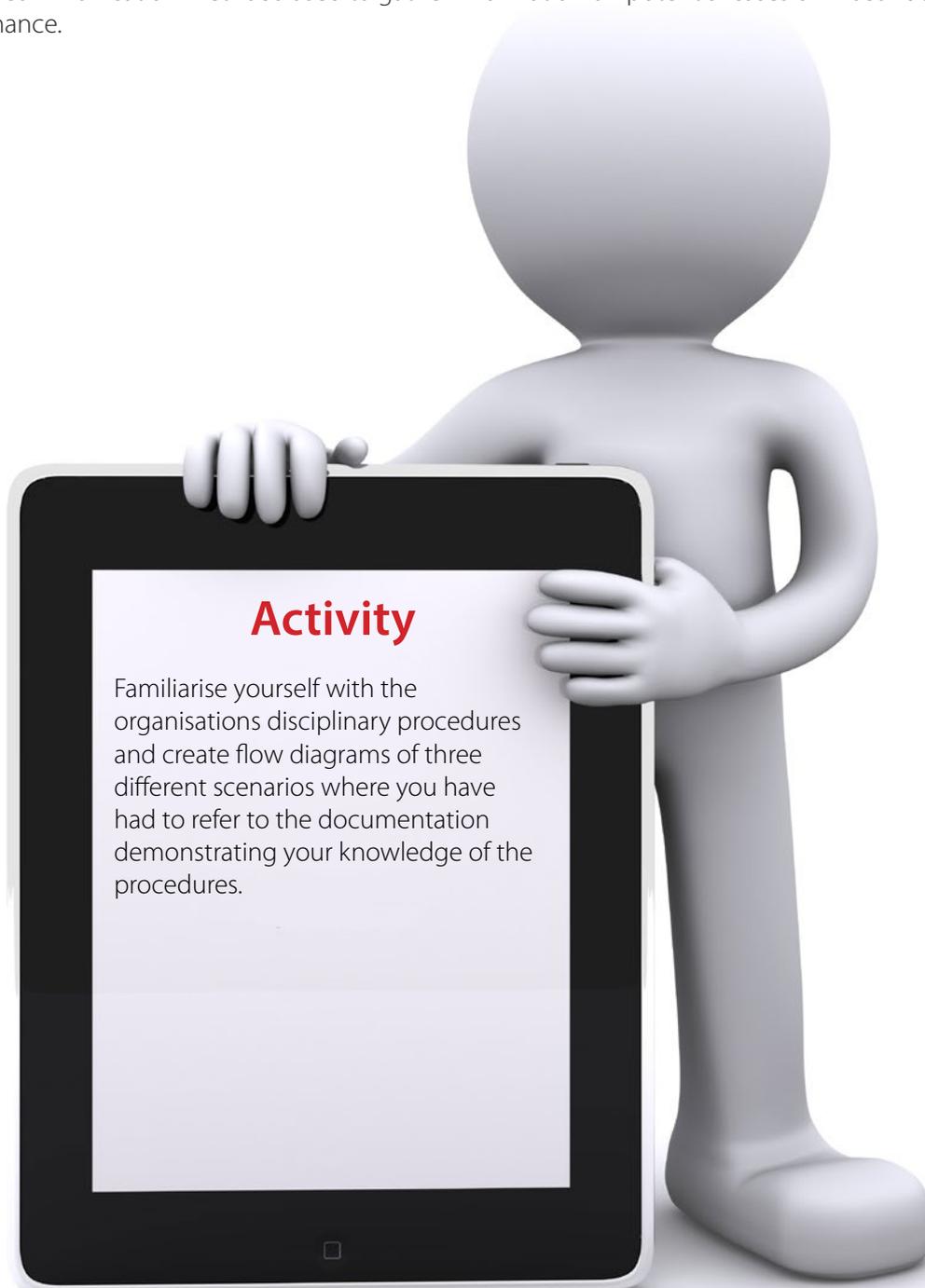
Learning Outcome 3 - Be able to know how to deal informally with cases of minor misconduct or unsatisfactory performance

Assessment criteria. I can:

3.1   Identify the differences between misconduct, gross misconduct and unsatisfactory performance, and how each should be handled.

3.2   Evaluate whether a case of misconduct or unsatisfactory performance can be dealt with informally.

3.3   Assess methods available to improve performance or behaviour.

3.4   Explain the importance of recording informal disciplinary proceedings

Learning Outcome 4 - Be able to follow an organisation's formal disciplinary procedure

Assessment criteria. I can:

4.1   Explain the importance of seeking advice and guidance from specialists prior to taking action

4.2   Explain when to follow formal disciplinary procedures

4.3   Assess the importance of communicating disciplinary procedures to individuals

4.4   Explain how to record and store information throughout the disciplinary process

Did you know?

The ACAS Code of Practice sets out principles for handling disciplinary and grievance situations in the workplace.

Adapted from Discipline and grievances at work: The ACAS guide.
http://www.acas.org.uk/CHttpHandler.ashx?id=981

Key terms/words

Regulatory & statutory requirements: these are existing laws that have been passed which businesses have to adhere to.

Organisational requirements: these are activities that the business has decided that members of staff should meet.

Misconduct: when an organisation identifies some inappropriate or unacceptable behaviour at the workplace

Unsatisfactory performance: when an employee's output of work is not within the normal standards set within the organisation.

Points to note

Being able to informally identify potential misconduct or unsatisfactory performance with colleagues should make them more aware in the future. It would be a warning to them.

Periodically going through the disciplinary procedures with the team or pointing out the procedures in the staff handbook will show staff the high standards that are required when working for such an organisation.

UNIT D15 (K/600/9692)

MANAGING GRIEVANCE PROCEDURES

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners can follow grievance procedures in their own organisation.

The unit is divided into four outcomes:

1. Understand how to prevent potential grievances
2. Understand an organisation's grievance policy and procedure and deal with concerns raised by individuals informally
3. Understand how to follow grievance procedures

UNIT D15 (K/600/9692)

MANAGING GRIEVANCE PROCEDURES

Learning Outcome 1 - Understand how to prevent potential grievances

Assessment criteria. I can:

1.1   Identify situations that are likely to lead to grievances in an organisation.

1.2   Explain how to prevent potential grievances

Learning outcome 2 - Understand an organisation's grievance policy and procedure and deal with concerns raised by individuals informally

Assessment criteria. I can:

2.1   Explain an organisation's grievance policy and procedure

2.2   Identify the circumstances where a concern may be dealt with informally

2.3   Explain the methods used to deal informally with concerns

Activity

Investigate and create a list of useful contacts that may be needed in the future if a situation arose where grievance procedures had to be implemented. Familiarise yourself with any organisational documentation that you may to use in the future.
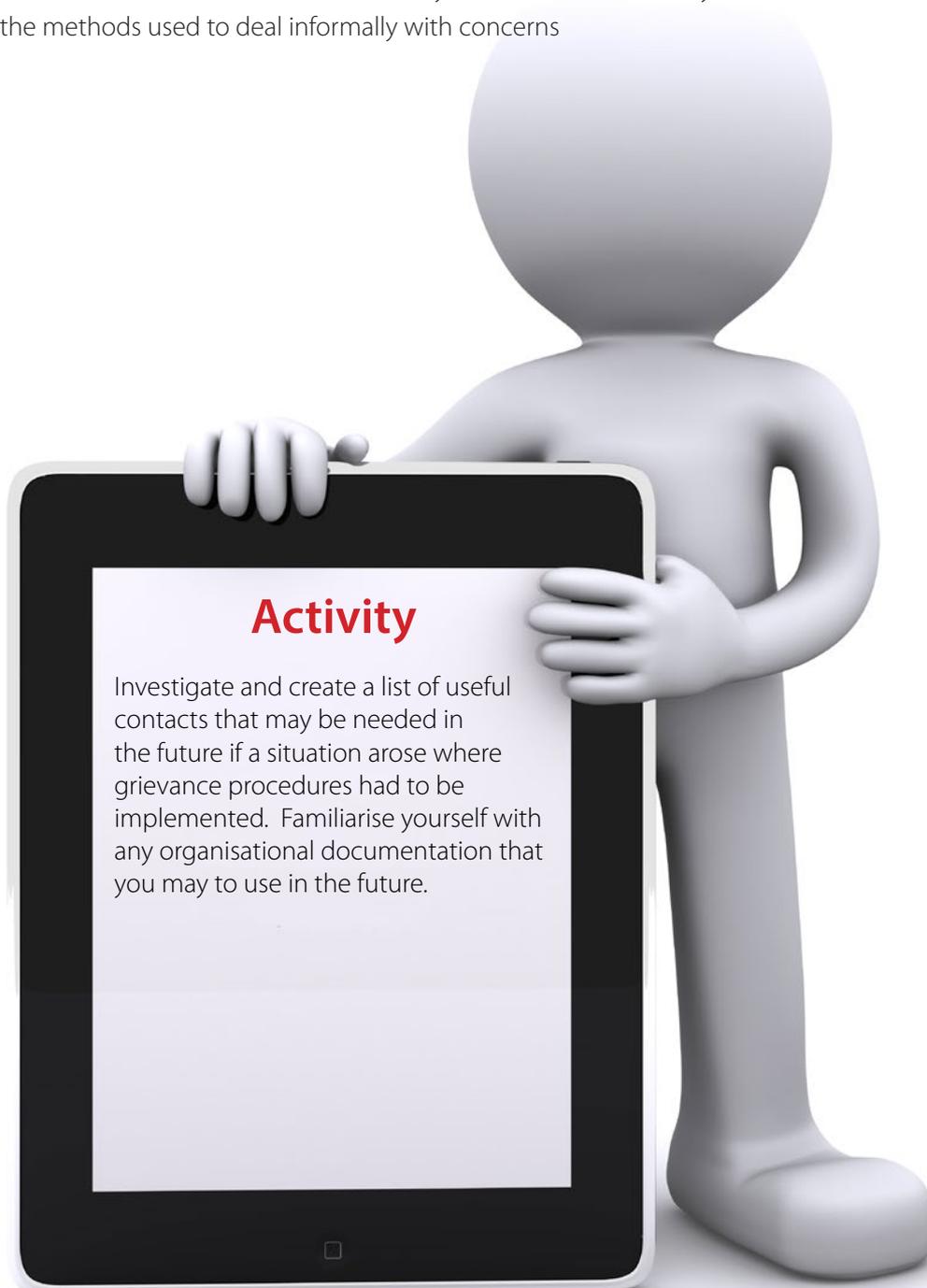
Learning Outcome 3 - Understand how to follow grievance procedures

Assessment criteria. I can:

3.1   Explain how to follow an organisation's written grievance procedure.

3.2   Explain the importance of communicating grievance procedures.

3.3   Identify how to seek advice and guidance from specialists or colleagues when dealing with grievances

3.4   Explain how to record and store information throughout the grievance process.

Did you know?

ACAS stands for the Advisory, Conciliation and Arbitration Service and it "aims to improve organisations and working life through better employment relations"

Adapted from http://www.acas.org.uk/index.aspx?articleid=1461
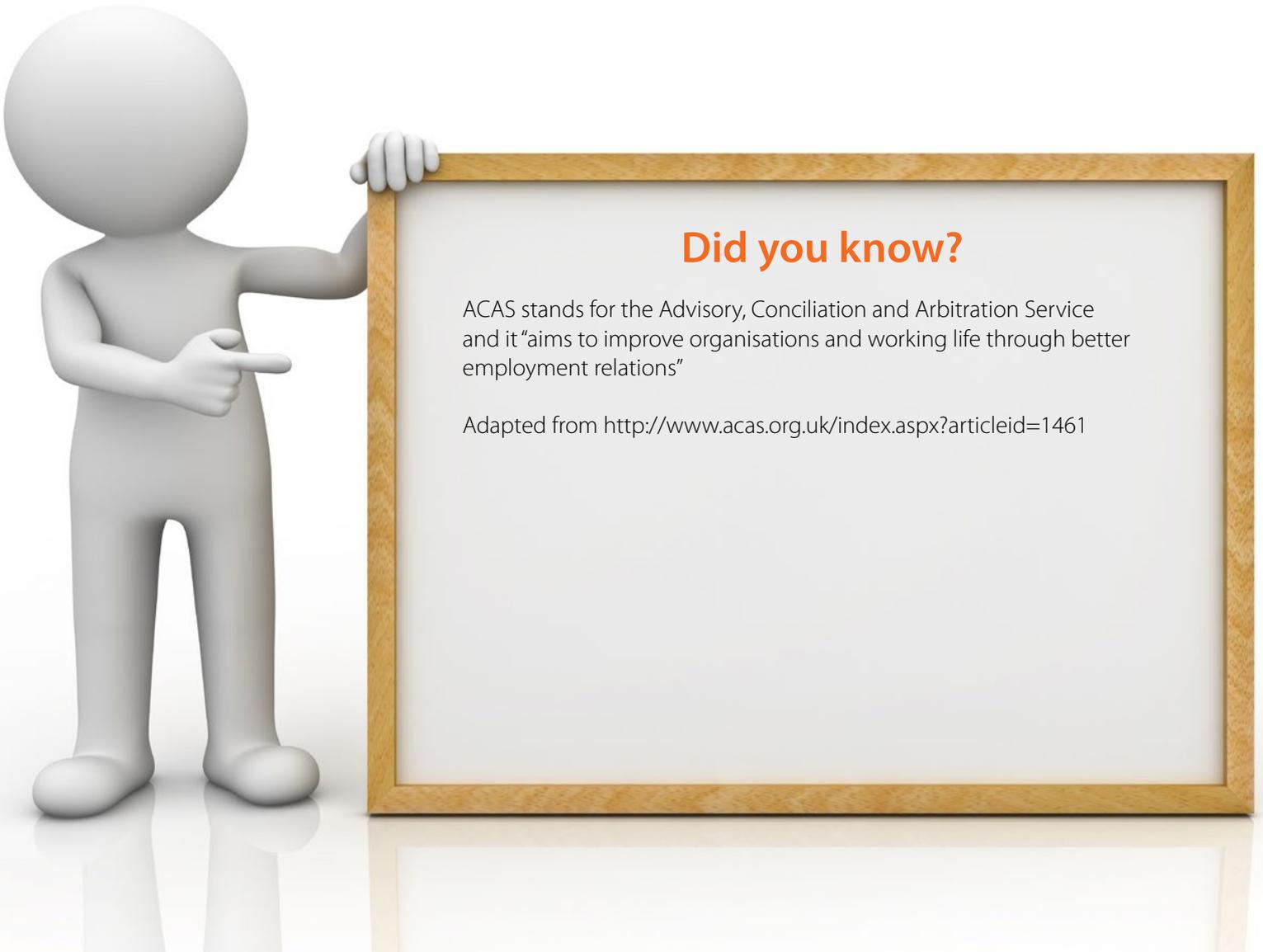
Key terms/words

Grievances within organisations: these are situations that can arise in the workplace resulting in a complaint.

Appropriate methods of communication: methods of communication will vary according to the type of information that you need to inform to colleagues.

Informally: discussions or situations that can be discussed before the more formal organisational procedures may have to be implemented depending on the outcomes.
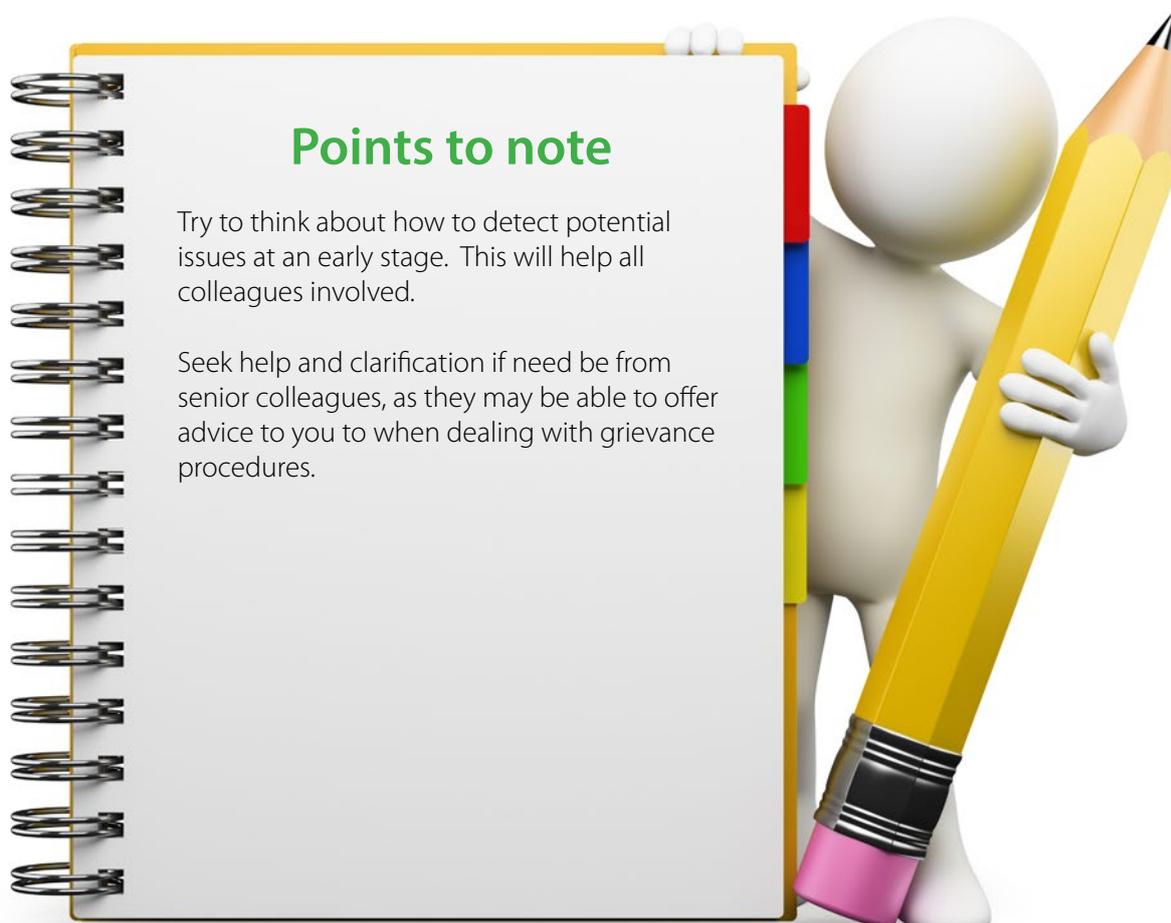
Points to note

Try to think about how to detect potential issues at an early stage. This will help all colleagues involved.

Seek help and clarification if need be from senior colleagues, as they may be able to offer advice to you to when dealing with grievance procedures.

UNIT D16 (M/600/9693)

SUPPORT THE MANAGEMENT OF REDUNDANCIES IN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners understand the organisation's redundancy policy and associated processes and procedures and can apply them to support those who are made redundant and those who will remain in employment by using clear and consistent communication methods and providing specialist support where appropriate.

The unit is divided into four outcomes:

1. Understand how to follow redundancy policy within own area of responsibility
2. Communicate information on redundancies to those affected
3. Understand how to support those affected by redundancies

UNIT D16 (M/600/9693)

SUPPORT THE MANAGEMENT OF REDUNDANCIES IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Understand how to follow redundancy policy within own area of responsibility

Assessment criteria. I can:

1.1   Explain own organisation's redundancy policy, processes and any appeals procedures

1.2   Identify how to access support from colleagues or specialists when following redundancy processes

Learning outcome 2 - Communicate information on redundancies to those affected

Assessment criteria. I can:

2.1   Explain how continuous communication with those affected by the redundancy policy

2.2   Explain the form of communication required to inform individuals selected for redundancy

2.3   Assess how to maintain the morale of remaining individuals.

Activity

Devise a survey to give to employees to determine how they are feeling in terms of their job security within the organisation. It will be good to gauge the level of morale and could be a useful tool for a management discussion.
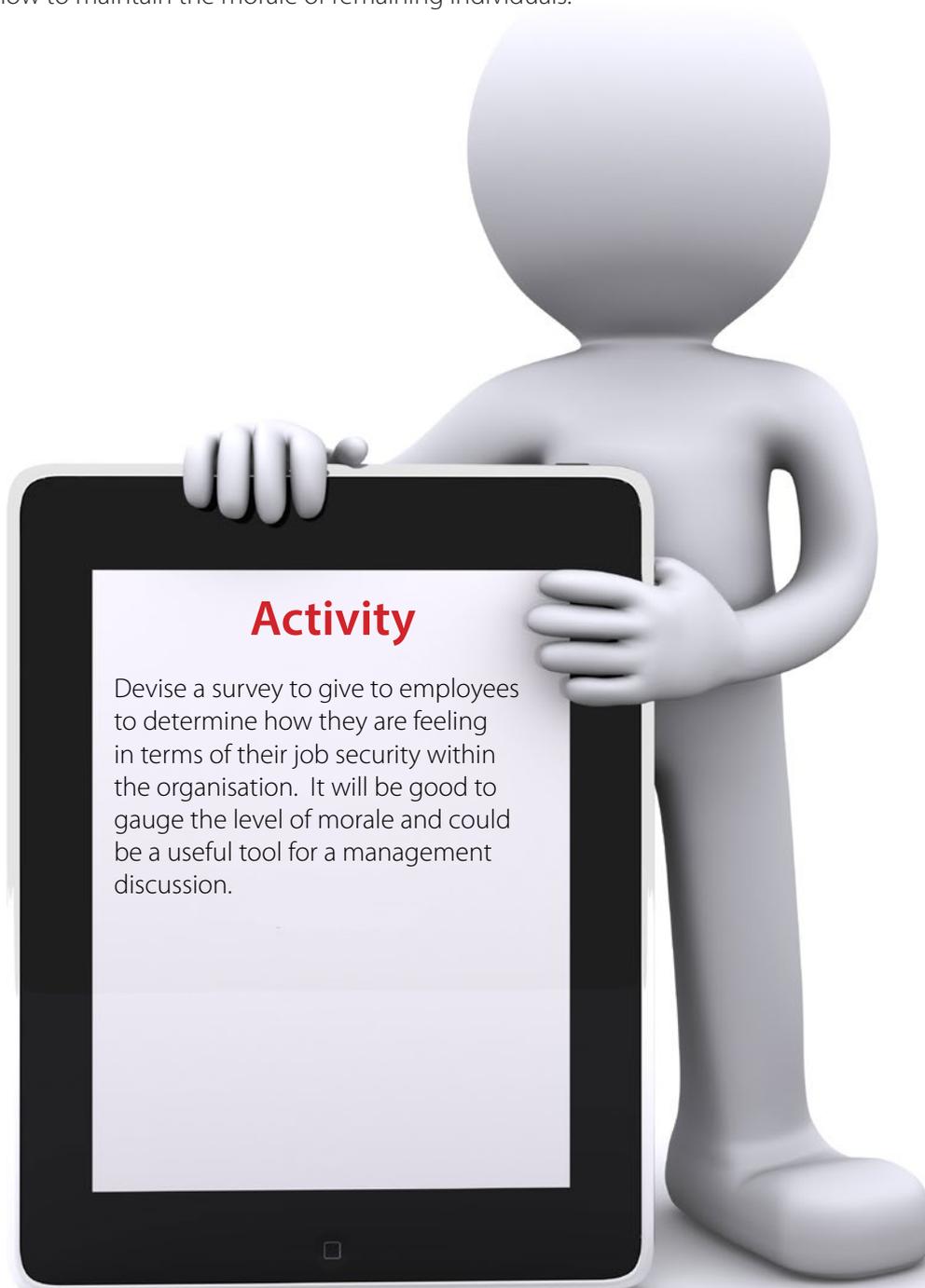
Learning Outcome 3 - Understand how to support those affected by redundancies

Assessment criteria. I can:

3.1 Identify where support from colleagues or specialists may be accessed by those affected by redundancies
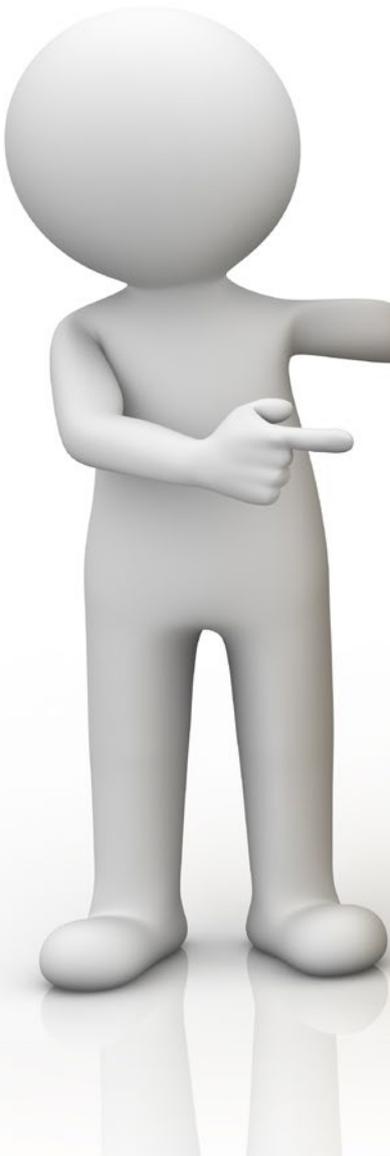
Did you know?

According to a report entitled "Counting the cost of the jobs recession" based on official statistics and CIPD survey evidence found in March 2012, that Almost 2.7 million people have been made redundant in the past four years, equivalent to one in ten employees at the start of the recession. The manufacturing and construction sectors together account for a third of total redundancies since 2008 (more than double the combined share of these sectors in total employment). By comparison, public administration, education and health account for 11% of redundancies, while the finance, insurance and real estate sector accounts for 6%. Adapted from CIPD press release.

http://www.cipd.co.uk/pressoffice/press-releases/redundancies-since-jobs-recession-140312.aspx

Key terms/words

Redundancy: when a particular job is no longer required within an organisation, making the staff member redundant from the organisation.

External agencies: these are stakeholders who will interact with a business when required and may influence certain aspects of the organisation.

Managing staff through the redundancy period: maintaining morale in a redundancy period can be hard as staff may feel very vulnerable. You will need to show strength and encourage communication within teams with staff at all levels.
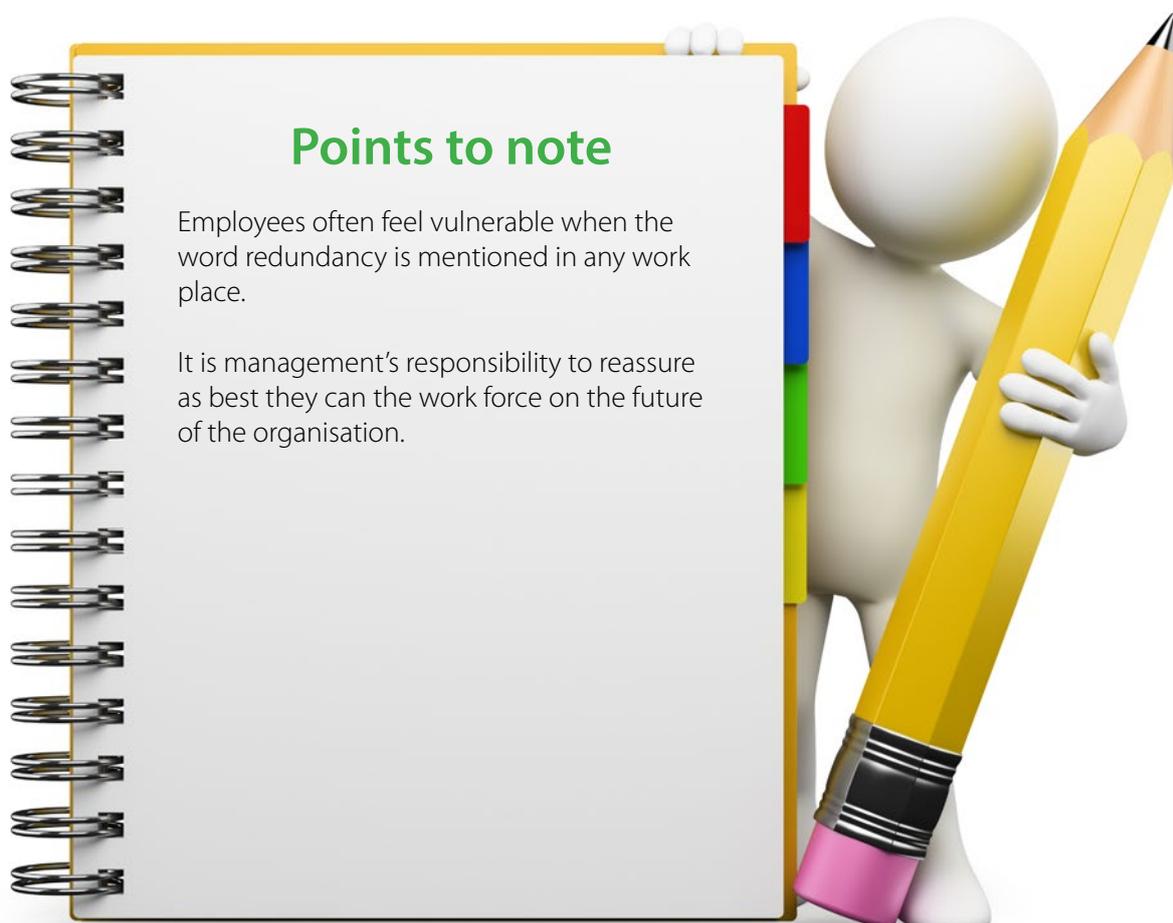
Points to note

Employees often feel vulnerable when the word redundancy is mentioned in any work place.

It is management's responsibility to reassure as best they can the work force on the future of the organisation.

UNIT E6 (L/600/9703)

DEVELOP AND IMPLEMENT A RISK ASSESSMENT PLAN IN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit helps learners promote, monitor and review health and safety in own area of responsibility.

The unit is divided into four outcomes:

1. Understand the legal requirements and personal responsibilities for health and safety within an organisation
2. Be able to promote the importance of health and safety practices
3. Be able to ensure that hazards and risks are identified and managed in own area of responsibility
4. Be able to monitor and review health and safety performance and policy in own area of responsibility

UNIT E6 (L/600/9703)

DEVELOP AND IMPLEMENT A RISK ASSESSMENT PLAN IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Understand the legal requirements and personal responsibilities for health and safety within an organisation

Assessment criteria. I can:

1.1   State the legal requirements that apply to own role in relation to health and safety.

1.2   Consult with specialist advisor(s) on health and safety policy and procedures.

1.3   Explain an organisation's health and safety responsibilities

1.4   Describe health and safety responsibilities in own area of responsibility.

Learning outcome 2 - Be able to promote the importance of health and safety practices

Assessment criteria. I can:

2.1   Communicate an organisation's written health and safety policy to individuals within own area of responsibility

2.2   Allocate sufficient resources to deal with health and safety issues in own area of responsibility

Activity

Create a mini survey for colleagues to complete to try to determine what they consider to be the health and safety risks within the work place. From the results you should be able to identify what aspects need to be investigated further.
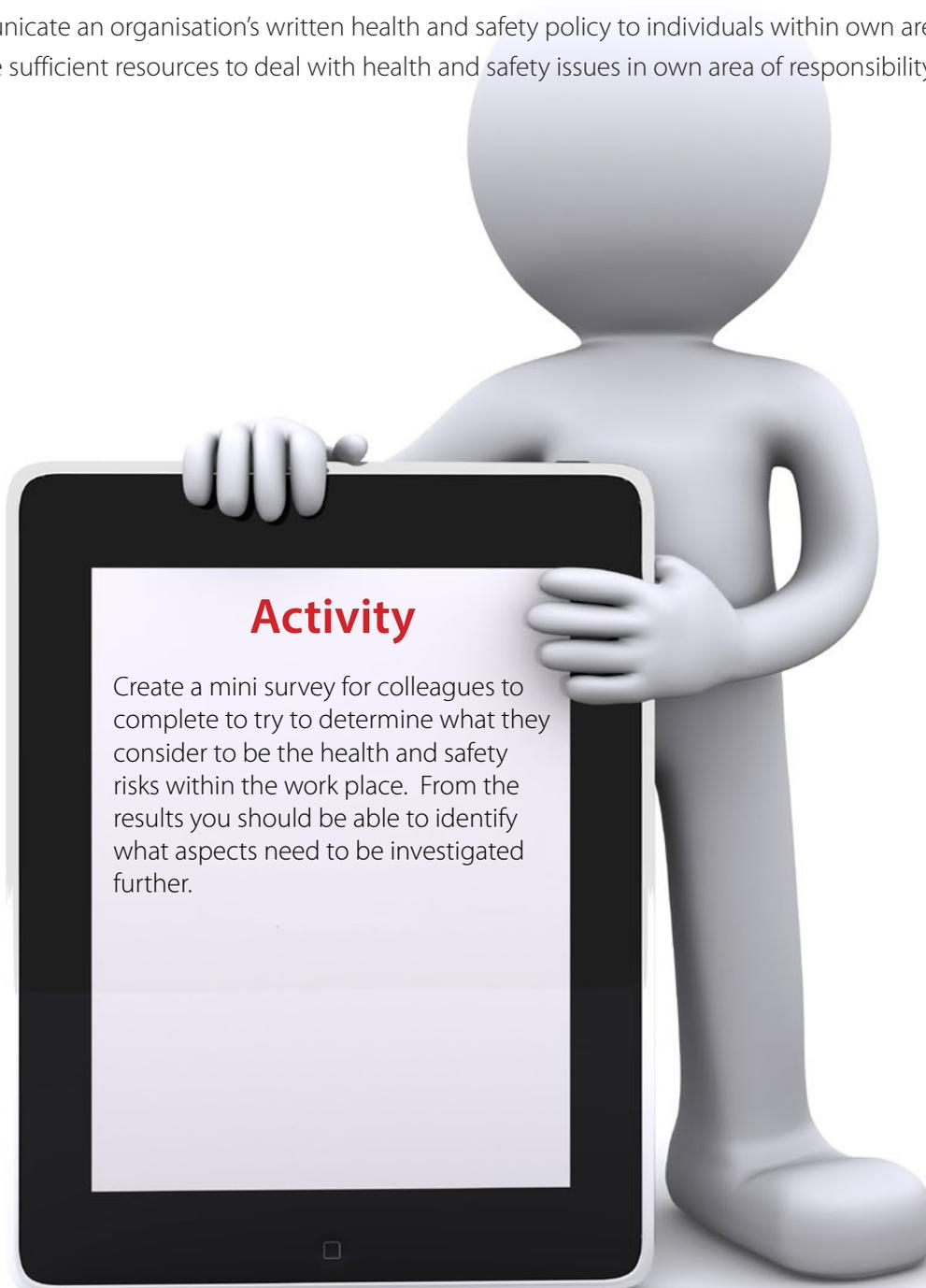
Learning Outcome 3 - Be able to ensure that hazards and risks are identified and managed in own area of responsibility

Assessment criteria. I can:

3.1   Consult with colleagues on health and safety hazards and risks in own area of responsibility.

3.2   Assess health and safety hazards and risks in own area of responsibility

3.3   Identify hazards and risks that require action to be taken to ensure compliance with legal and organisational requirements.

3.4   Develop and implement a plan to in own area of responsibility

Learning Outcome 4 - Be able to monitor and review health and safety performance and policy in own area of responsibility

Assessment criteria. I can:

4.1   Establish procedures that monitor health and safety performance in own area of responsibility

4.2   Review the health and safety performance of own area of responsibility.

4.3   Review the health and safety policy in own area of responsibility

Did you know?

According to the Health and Safety Executive in 2011/2012: 173 workers were killed at work, 111 000 other injuries to employees were reported under RIDDOR (Reporting of Injuries, Diseases and Dangerous Occurrences Regulations), 212 000 over-three-day absence injuries occurred, 27 million working days were lost due to work-related illness and workplace injury.

Adapted from Health and Safety Executive statistics: http://www.hse.gov.uk/statistics/

Key terms/words

Specialist advisors: often from an outside agency, they will come into a workplace and offer advice about health and safety issues and ways to minimise risks.

Appropriate language: it is important that management use the correct language that the workforce will understand, as Health and Safety in the workplace affects all.

Be aware of one's own health and safety and that of your colleagues: employees must think about their own Health and Safety to ensure that they are safe, but they also must consider their colleagues when completing work as their safety is as important. Awareness is key.

Cyclical review: this occurs in a given cycle.

Points to note

Promoting health and safety in the workforce will ensure that colleagues are more aware

The Health and Safety at Work Act 1974 was implemented because of the need to protect organisations at all times. This is still true for today.
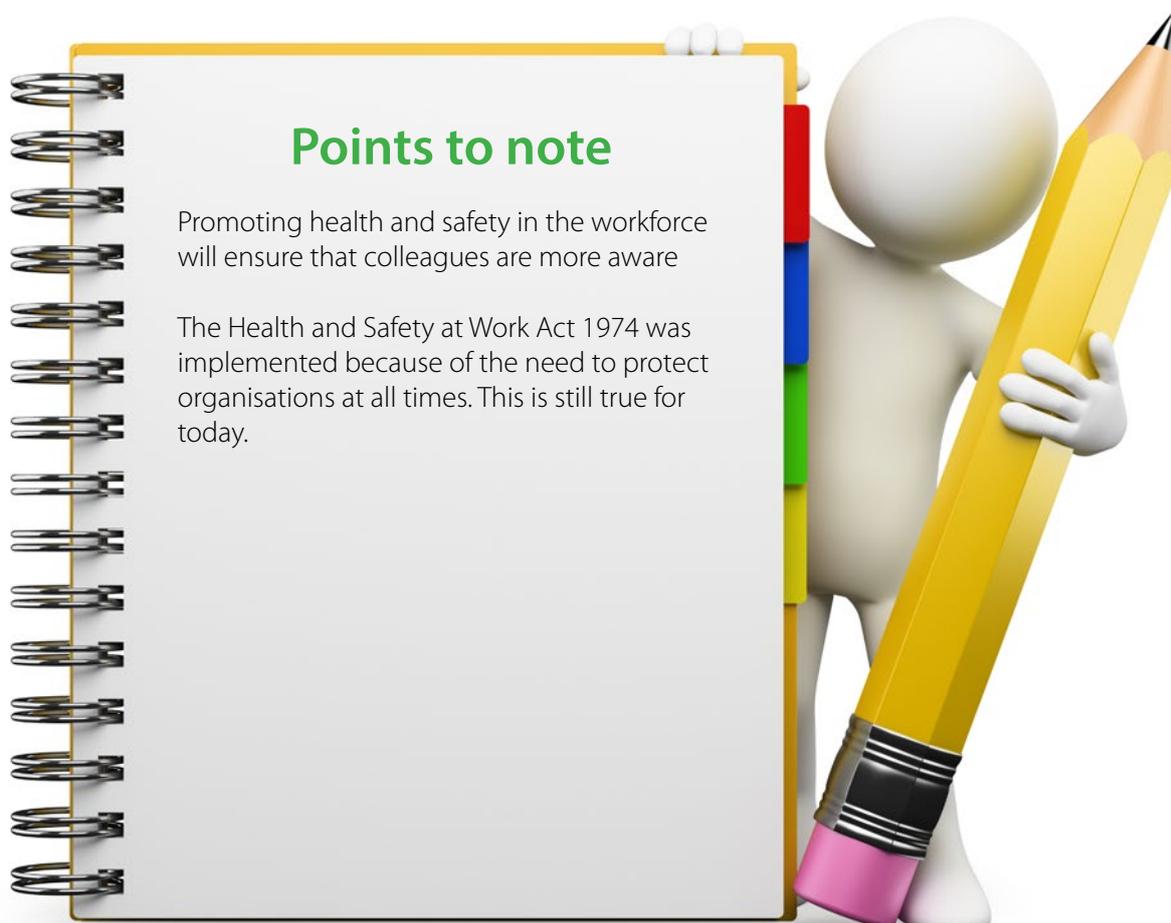
UNIT E8 (K/600/9711)

MANAGE PHYSICAL RESOURCES

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to identify, obtain, manage and review the use of physical resources. The unit also ensures learners are able to take the environmental impact of resource use into consideration.

The unit is divided into four outcomes:

1. Understand the importance of sustainability when using physical resources
2. Be able to identify resource requirements for own area of responsibility
3. Be able to obtain required resources for own area of responsibility
4. Be able to monitor and review the quality and usage of resources in own area of responsibility

UNIT E8 (K/600/9711)

MANAGE PHYSICAL RESOURCES

Learning Outcome 1 - Understand the importance of sustainability when using physical resources

Assessment criteria. I can:

1.1 Explain the importance of using sustainable resources

1.2 Explain the potential impact of resource use on the environment

1.3 Explain how to use resources effectively and efficiently

1.4 Describe actions one can take to minimise any adverse environmental impact of using physical resources

Learning outcome 2 - Be able to identify resource requirements for own area of responsibility

Assessment criteria. I can:

2.1 Consult with colleagues to identify their planned activities and corresponding resource needs

2.2 Evaluate past resource use to inform expected future demand

2.3 Identify resource requirements for own area of responsibility
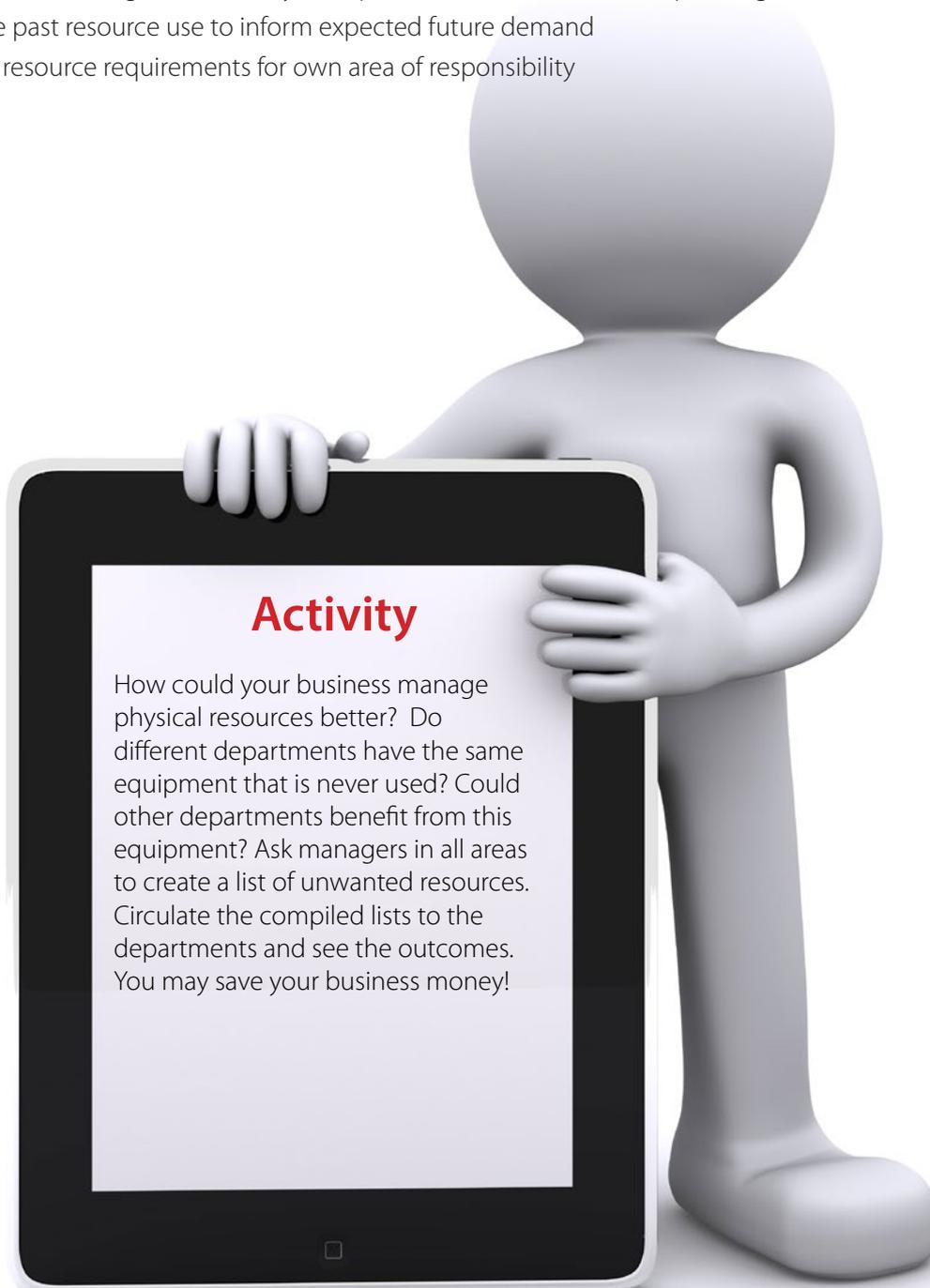
Activity

How could your business manage physical resources better? Do different departments have the same equipment that is never used? Could other departments benefit from this equipment? Ask managers in all areas to create a list of unwanted resources. Circulate the compiled lists to the departments and see the outcomes. You may save your business money!

**Learning Outcome 3 - Be able to obtain required resources for own area of responsibility**

Assessment criteria. I can:

3.1   Submit a business case to procure required resources.

3.2   Review and agree required resources with relevant individuals.

3.3   Explain an organisation's processes for procuring agreed resources.

Learning Outcome 4 - Be able to monitor and review the quality and usage of resources in own area of responsibility

Assessment criteria. I can:

4.1   Monitor the quality of resources against required specifications

4.2   Identify differences between actual and planned use of resources and take corrective action.

4.3   Analyse the effectiveness and efficiency of resource use in own area of responsibility.

4.4   Make recommendations to improve the effectiveness and efficiency of resource use.

Did you know?

A monitor left on overnight wastes enough energy to laser-print 800 A4 pages. Lighting an empty office overnight wastes enough energy to heat water for 1,000 cups of coffee.

Adapted from The British Assessment Bureau: http://www.british-assessment.co.uk/articles/eco-friendly-office-guide

Key terms/words

Sustainable Resources: businesses should try to gain resources that will maintain the level of output required, keeping replenishment levels to a minimum and the environmental aspects must also be considered.

Identifying resource need: employees will always have a 'wish list' of resources that they require, but identifying the needs from the wants is a managerial task, especially when budgets have to be established and considered.

Explaining processes: if is often useful to explain processes to your team so they can understand why certain decisions are made. Colleagues can understand the pressure that managers are under to make harsh decisions and this way they may be more understanding if they have the same knowledge as you.

Points to note

Making staff more environmentally aware will benefit the organisation. Simple changes such as having monitors switched off at the end of the day, rather than on standby, recycling stations from paper to cans, switching off lights due to inactivity will save the business money and make them more environmentally friendly. Talk to management as anything to save money will bring a smile to their faces.
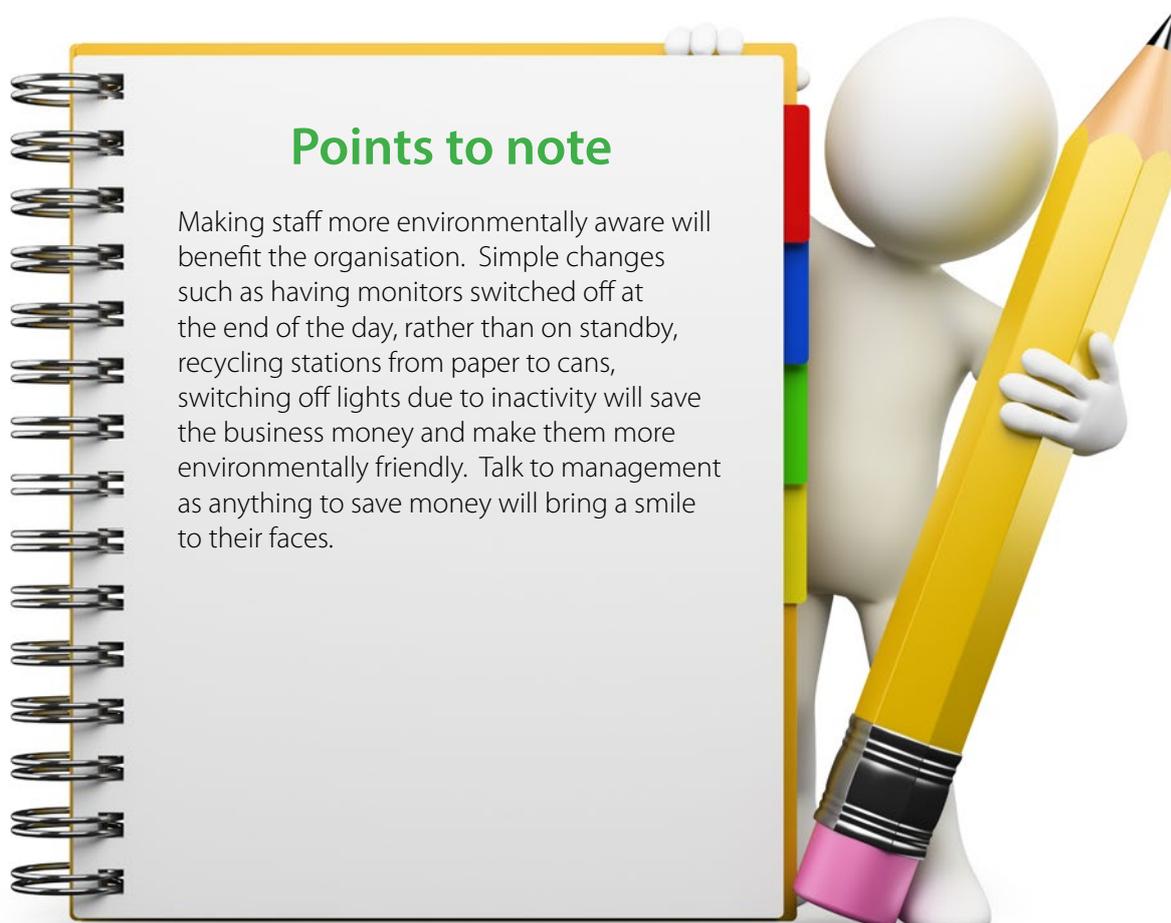
UNIT E9 (M/600/9712)

MANAGE THE ENVIRONMENTAL IMPACT OF WORK ACTIVITIES

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners understand how to, and are able to, assess the environmental impact of their work and operate in such a way as to reduce the impact on the environment.

The unit is divided into four outcomes:

1. Understand the legal requirements and environmental policies that impact on own area of responsibility
2. Understand how to assess the impact of work activities on the environment and how this can be minimised
3. Be able to assess and report on the environmental impact of work activities in own area of responsibility
4. Be able to organise work activities and resource use to minimise environmental impact
5. Be able to promote ongoing improvement in environmental performance

UNIT E9 (M/600/9712)

MANAGE THE ENVIRONMENTAL IMPACT OF WORK ACTIVITIES

Learning Outcome 1 - Understand the legal requirements and environmental policies that impact on own area of responsibility

Assessment criteria. I can:

1.1   Explain the legal requirements that impact on own area of responsibility.

1.2   Explain the environmental policies that impact on own area of responsibility.

Learning outcome 2 - Understand how to assess the impact of work activities on the environment and how this can be minimised

Assessment criteria. I can:

2.1   Explain what specialist advice is available to manage the environmental impact of work activities.

2.2   Explain how to assess the impact of work activities and resources on the environment.

2.3   Explain how to minimise the environmental impact of work activities

Activity

Consider business resources that you predominately use on a daily basis and investigate if alternatives could be sourced which would help manage your businesses in terms of the environment.
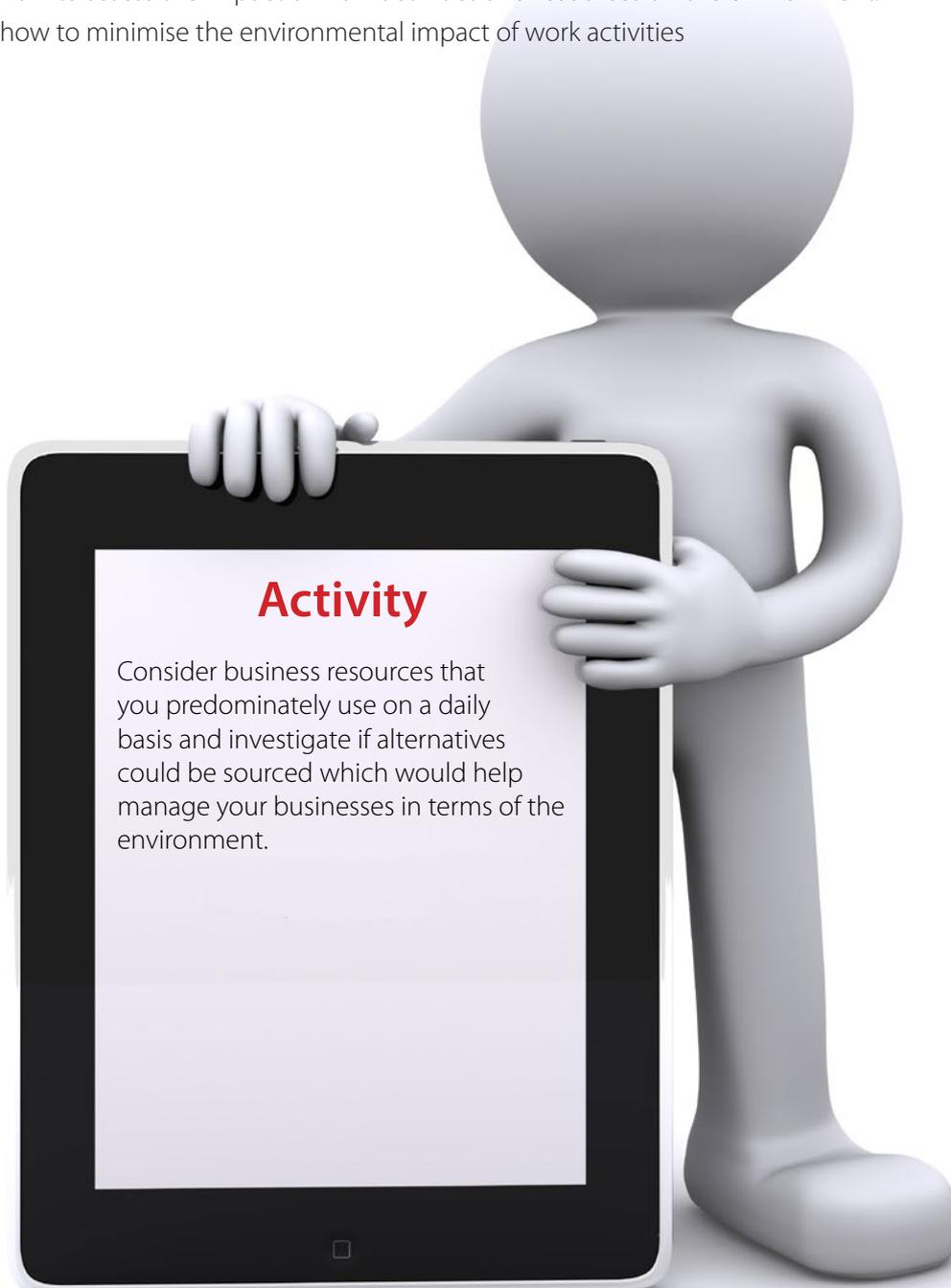
Learning Outcome 3 - Be able to assess and report on the environmental impact of work activities in own area of responsibility

Assessment criteria. I can:

3.1   Assess the environmental impact of work activities and resource use.

3.2   Produce a report on the environmental impact of work activities and resource use, with recommendations for improvement

**Learning Outcome 4 - Be able to organise work activities and resource use to minimise environmental impact**

Assessment criteria. I can:

4.1   Adapt the use of resources in own area of responsibility to reduce environmental impact

4.2   Organise activities in own area of responsibility to reduce environmental impact

Learning Outcome 5 - Be able to promote ongoing improvement in environmental performance

Assessment criteria. I can:

5.1   Establish means by which individuals can identify and report opportunities for improving environmental performance

5.2   Communicate environmental benefits resulting from changes to work activities

Did you know?

The average office worker uses up to 100 sheets of paper each day. Recycled paper can use up to 90% less water and 50% less energy than making it brand new from trees.

Adapted from The British Assessment Bureau: http://www.british-assessment.co.uk/articles/eco-friendly-office-guide

Key terms/words

Reducing the environmental impact: businesses need to consider the impact of the resources used, whilst completing the work activities of the organisation. By considering these impacts the organisation can evaluate ways to try to reduce the impact on the environment, such as not using electrical items, and reducing the use of 'stand by' on machines etc.

Specialist advice available nationally: there are many organisations that can advise and help businesses to think about environmental aspects in a workplace. Examples are: DEFRA, Environmental Agency, sector specific bodies, local government and organisational specialists. Businesses can contact these organisations directly for advice.

Promote on going improvements: teams should be made aware that businesses can always improve and this should be promoted within the business. Remember that making changes for the environment can save money for the organisation.

Points to note

It is important that a workplace tries to operate in such a way as to reduce the impact on the environment.

Businesses are encouraged to share their environmental savings with other businesses, customers and stakeholders. Organisations such as The Green Achiever or the Green Business Awards recognise the successes of organisations and celebrate these successes with businesses annually.

UNIT E10 (F/600/9715)

MAKE EFFECTIVE DECISIONS

THIS IS AN OPTIONAL UNIT

This unit will ensure that the learners understand the process of decision making, and can identify and analyse information to enable them to come to a final decision.

The unit is divided into four outcomes:

1. Be able to identify circumstance that require a decision to be made
2. Be able to collect information to inform decision making
3. Be able to analyse information to inform decision making
4. Be able to make a decision.

UNIT E10 (F/600/9715)

MAKE EFFECTIVE DECISIONS

Learning Outcome 1 - Be able to identify circumstance that require a decision to be made

Assessment criteria. I can:

1.1   Explain the circumstances requiring a decision to be made.

1.2   State the desired objective(s) for making the decision.

1.3   Establish criteria on which to base the decision, in line with own organisation.

Learning outcome 2 - Be able to collect information to inform decision making

Assessment criteria. I can:

2.1   Identify information needed to inform the decision making process.

2.2   Communicate with stakeholders affected by the decision.

2.3   Explain how to inform stakeholders about the decision making process.

Activity

Review a decision you have taken recently at work and identify what level of the knowledge hierarchy you used for each. Was the information on which you based your decision accurate, adequate, current, factual, relevant, reliable and valid? How do you know?

Learning Outcome 3 - Be able to analyse information to inform decision making

Assessment criteria. I can:

3.1   Identify information for validity and relevance to the decision making process.

3.2   Analyse information and against established criteria.

Learning Outcome 4 - Be able to make a decision

Assessment criteria. I can:

4.1   Apply decision making techniques to determine a decision

4.2   Explain the decision made in line with desired objectives

4.3   Communicate the decision taken to relevant stakeholders

Did you know?

Mike Myatt, Leadership Matters:The CEO Survival Manual (2007) has identified a hierarchy of knowledge used in decision making as follows: Gut Instinct (an experiential and/or emotional filter that often has no current underpinning of hard analytical support); Data (Raw data is comprised of disparate facts, statistics, or random inputs that in-and-of-themselves hold little value); Information (derived from a collection of processed data where context and meaning have been added to disparate facts which allow for a more thorough analysis); Knowledge (information that has been refined by analysis such that it has been assimilated, tested and/or validated). He says that "Decisions made at the gut instinct or data level can be made quickly, but offer a higher level of risk. Decision made at the information level affords a higher degree of risk management, but are still not as safe as those decisions based upon actionable knowledge."

Key terms/words

Decision: the selection between possible actions; a determination arrived at after consideration; a judgment.

Decision making: the mental processes resulting in the selection of a course of action among several alternative scenarios. Every decision making process produces a final choice. The output can be an action or an opinion of choice.

Stakeholder: someone with an interest in the decision and its outcomes.

Points to note

Decision making is a key skill in the workplace, and is particularly important if you want to be an effective leader.

In making decisions it is important to firstly identify why you need to make the decision, then collect all the necessary information (remember the Pareto Principal or 80:20 ratio!) Let relevant stakeholders know about the process and how they might contribute – they can be useful in providing different viewpoints. Once you have collected the information, identify as many possible options as you can and then analyse each, using appropriate decision making techniques. Make your decision and then communicate it to stakeholders, being prepared to share your reasoning for the option you have selected.

UNIT E12 (T/600/9730)

MANAGE KNOWLEDGE IN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to understand how knowledge is managed, using agreed procedures and processes in own organisation.

The unit is divided into four outcomes:

1. Be able to understand existing knowledge management in own area of responsibility
2. Be able to develop knowledge
3. Be able to share knowledge
4. Be able to monitor and evaluate knowledge management in own area of responsibility.

UNIT E12 (T/600/9730)

MANAGE KNOWLEDGE IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Be able to understand existing knowledge management in own area of responsibility

Assessment criteria. I can:

1.1   Describe how knowledge is gained and applied in own area of responsibility

1.2   Explain how knowledge is shared in own area of responsibility

1.3   Outline how intellectual property is protected in own area of responsibility

Learning outcome 2 - Be able to develop knowledge

Assessment criteria. I can:

2.1   Identify established processes and procedures which can develop knowledge

2.2   Explain how to support individuals to ensure knowledge development processes are followed

Activity

Mike Myatt, Leadership Matters:The CEO Survival Manual (2007) has identified a hierarchy of knowledge used in decision making as follows: Gut Instinct (an experiential and/or emotional filter that often has no current underpinning of hard analytical support); Data (Raw data is comprised of disparate facts, statistics, or random inputs that in-and-of-themselves hold little value); Information (derived from a collection of processed data where context and meaning have been added to disparate facts which allow for a more thorough analysis); Knowledge (information that has been refined by analysis such that it has been assimilated, tested and/or validated). He says that "Decisions made at the gut instinct or data level can be made quickly, but offer a higher level of risk. Decision made at the information level affords a higher degree of risk management, but are still not as safe as those decisions based upon actionable knowledge."

Learning Outcome 3 - Be able to share knowledge

Assessment criteria. I can:

3.1   Communicate established processes which share knowledge across own area of responsibility

3.2   Explain how to support individuals to ensure knowledge sharing processes are followed

Learning Outcome 4 - Be able to monitor and evaluate knowledge management in own area of responsibility

Assessment criteria. I can:

4.1   Assess the knowledge development process in own area of responsibility

4.2   Implement any changes to improve knowledge management

4.3   Monitor change and development in the knowledge development process

Did you know?

Managers are bombarded with an almost constant stream of data every day. According to David Derbyshire, "Scientists have worked out exactly how much data is sent to a typical person in the course of a year – the equivalent of every person in the world reading 174 newspapers every single day" (Derbyshire, 2011)

Key terms/words

Knowledge management: the discipline of enabling individuals, teams and entire organisations to collectively and systematically create, share and apply knowledge, to better achieve their objectives.

Intellectual property (IP): refers to creations of the mind: inventions, literary and artistic works, and symbols, names, images, and designs used in commerce.

Points to note

Key reasons why actively managing knowledge is important to an organisation's success are that it: facilitates decision-making capabilities; builds learning organisations by making learning routine and stimulates cultural change and innovation.

You need to be clear about what knowledge is required, by whom, by when and why; the processes you need to follow in order for the team to remain effective in meeting its objectives. You should also know who should not be given access to information – such as intellectual property, or confidential personnel information, and the procedures for ensuring how such information is protected.

Knowledge acquisition and/or sharing of knowledge may be linked to the team members' objectives or performance. You will need to be aware of the range of methods available for knowledge sharing, and the processes involved, evaluate the effectivenes10and implement changes where you identify that your objectives have not been met.

UNIT E11 (H/600/9724)

COMMUNICATE INFORMATION AND KNOWLEDGE

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to communicate selected information and knowledge to a target audience using appropriate communication techniques and methods.

The unit is divided into four outcomes:

1. Be able to identify the information required, and its reliability, for communication
2. Be able to understand communication techniques and methods
3. Be able to communicate information and knowledge using appropriate techniques and methods
4. Be able to adapt communication techniques and methods according to target audience response

UNIT E11 (H/600/9724)

COMMUNICATE INFORMATION AND KNOWLEDGE

Learning Outcome 1 - Be able to identify the information required, and its reliability, for communication

Assessment criteria. I can:

1.1   Explain the information and knowledge that needs communicating

1.2   Identify the target audience requiring the information and knowledge

Learning outcome 2 - Be able to understand communication techniques and methods

Assessment criteria. I can:

2.1   Identify what techniques and methods can be used to communicate information and knowledge

2.2   Explain how to select the most appropriate technique and method
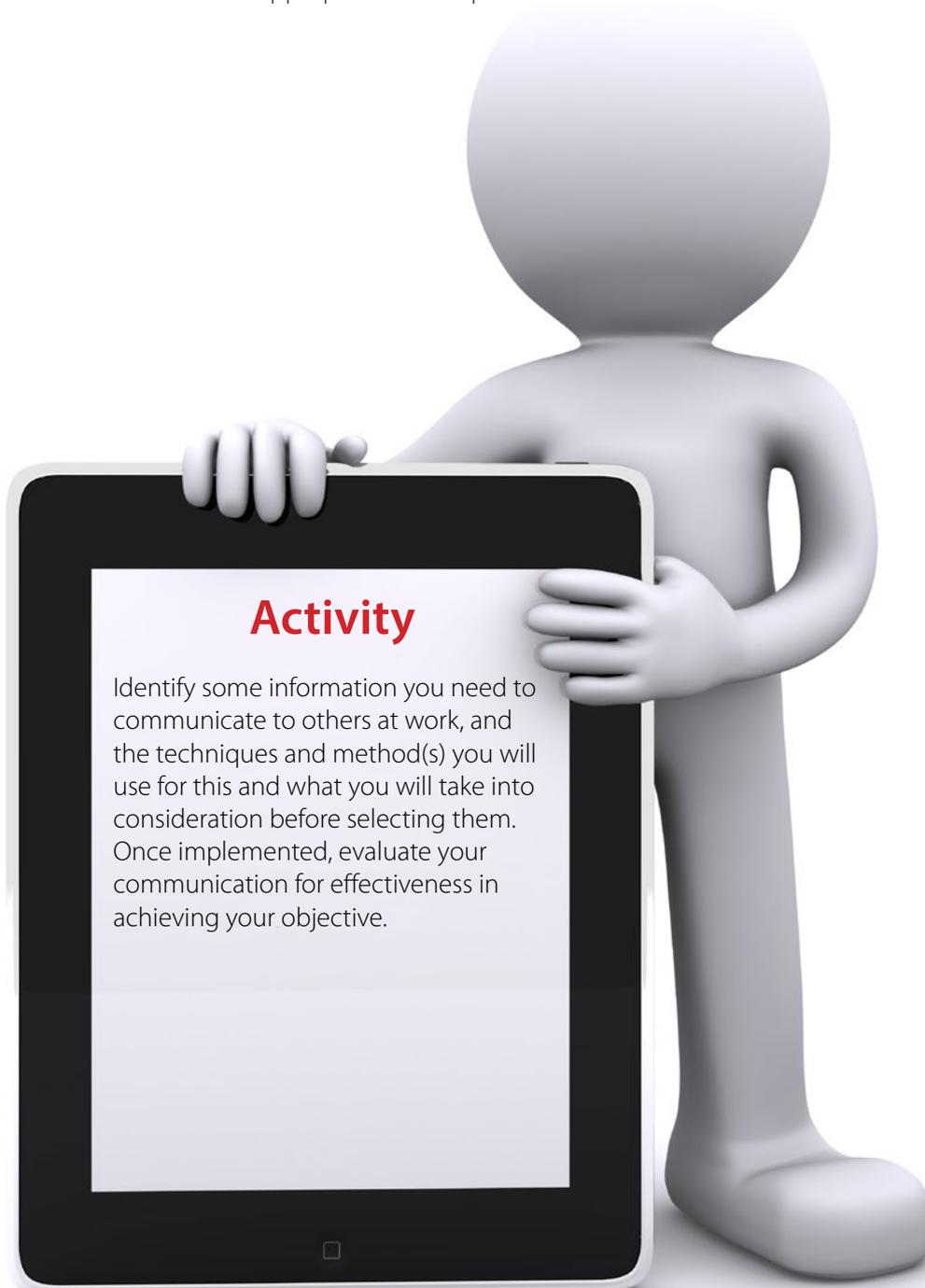
Activity

Identify some information you need to communicate to others at work, and the techniques and method(s) you will use for this and what you will take into consideration before selecting them. Once implemented, evaluate your communication for effectiveness in achieving your objective.

Learning Outcome 3 - Be able to communicate information and knowledge using appropriate techniques and methods

Assessment criteria. I can:

3.1   Communicate to target audience using the appropriate techniques and methods

3.2   Explain how the target audience has received and understood the information communicated

Learning Outcome 4 - Be able to adapt communication techniques and methods according to target audience response

Assessment criteria. I can:

4.1   Explain how to modify communication techniques and methods in response to verbal and non-verbal feedback

Did you know?

The first major model for communication came in 1949 by Claude Elwood Shannon and Warren Weaver, who identified the basic concept that communication is the process of sending and receiving messages or transferring information from one person (sender) to another (receiver). Wilbur Schramm (1954) also indicated that we should also examine the impact that a message has (both desired and undesired) on the target of the message.

Key terms/words

Communicate: to convey information; to express oneself in such a way that one is readily and clearly understood.

Communication: is the activity of conveying information through the exchange of thoughts, messages, or information, through speech, visuals, signals, writing, or behaviour.

Information: data that is accurate and timely, specific and organised for a purpose, presented within a context that gives it meaning and relevance, and can lead to an increase in understanding and decrease in uncertainty.

Points to note

Information is valuable because it can affect behaviour, a decision, or an outcome. People left to work in a vacuum, without sufficient information, knowledge or training soon become de-motivated.

You must be clear about what it is you wish to communicate and why, and you need to be aware of organisational policies, procedures and etiquette for communication. Ensure that you use appropriate methods and techniques depending on the location and make-up of the target audience, their level of understanding, the level of formality required and the importance and urgency of the information you wish to communicate. You also need to be aware of potential barriers and the impact of non-verbal communication.

Managers who can speak and write effectively are more likely to achieve success.

UNIT E15 (L/600/9734)

PROCURE SUPPLIES

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to identify required supplies, procure supplies and monitor their delivery.

The unit is divided into four outcomes:

1. Be able to identify requirements for supplies
2. Be able to evaluate suppliers that meet identified requirements
3. Be able to select suppliers and obtain supplies
4. Be able to monitor supplier performance.
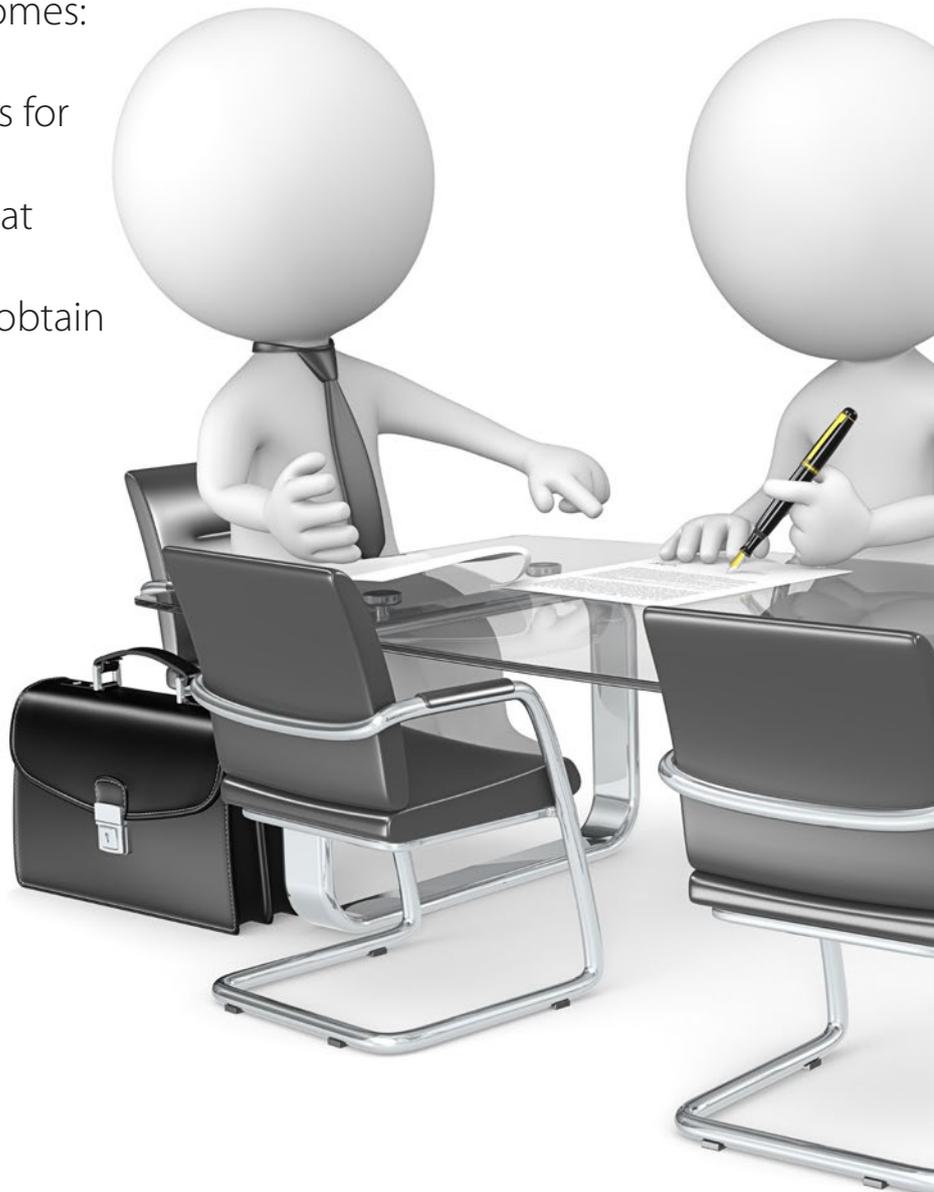
UNIT E15 (L/600/9734)

PROCURE SUPPLIES

Learning Outcome 1 - Be able to identify requirements for supplies

Assessment criteria. I can:

1.1   Select colleagues to agree requirements for supplies

1.2   Produce a specification for supply requirements

Learning outcome 2 - Be able to evaluate suppliers that meet identified requirements

Assessment criteria. I can:

2.1   Identify suppliers that meet resource, organisational and legal requirements

2.2   Evaluate suppliers against requirements

Activity

Create a list for your area of all your suppliers that you use for specific resources.

- Have there been any issues?
- If so what were they?
- Who dealt with the issue?
- How was it resolved?
- Identify these problems and add them to your document.

Consider how you could try to improve your suppliers for your business and how you could investigate this.
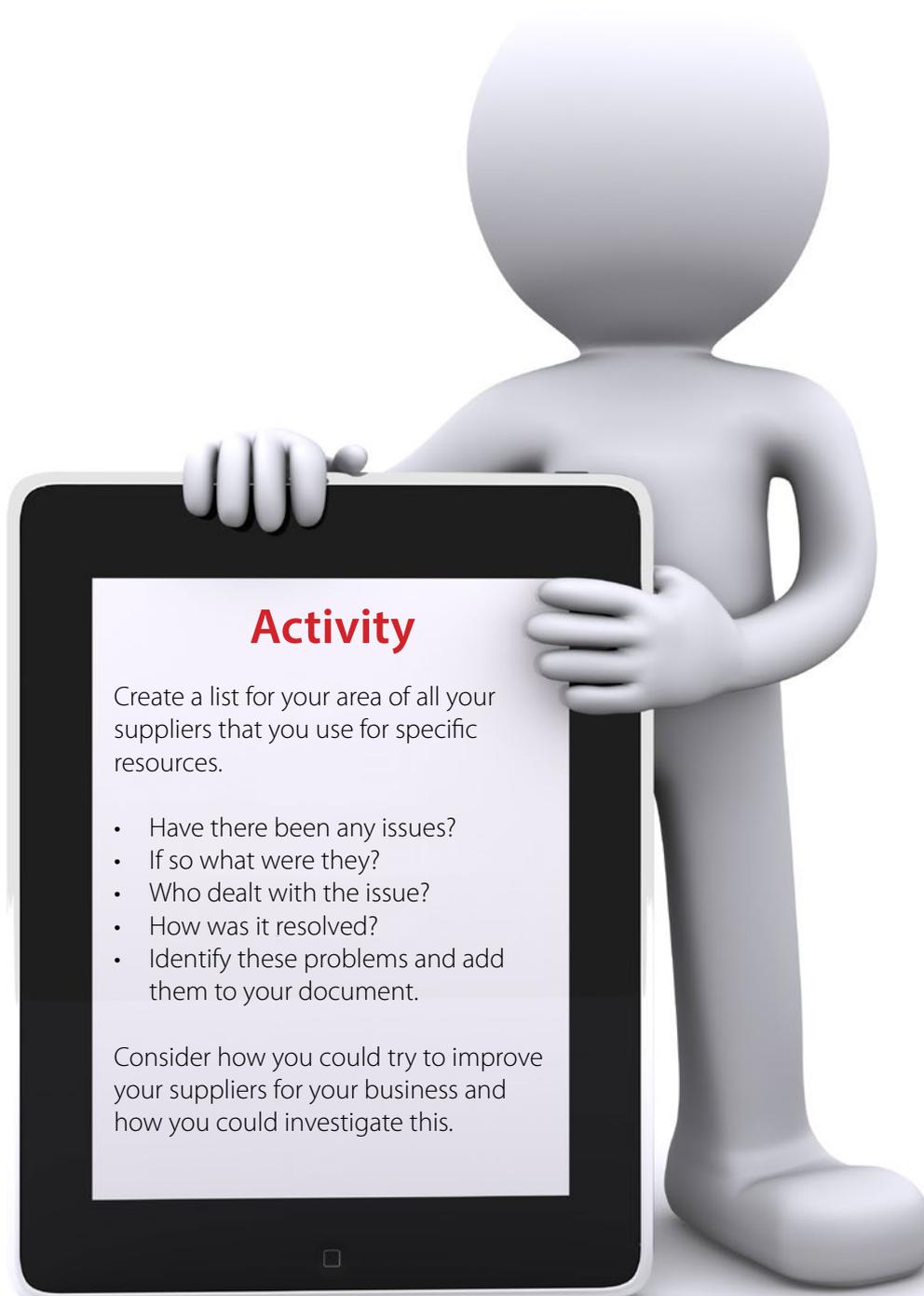
Learning Outcome 3 - Be able to select suppliers and obtain supplies

Assessment criteria. I can:

3.1   Select supplier(s) that best meet requirements

3.2   Explain how to agree with contractual terms with selected supplier(s)

Learning Outcome 4 - Be able to monitor supplier performance

Assessment criteria. I can:

4.1   Identify how to monitor supplier performance and delivery against agreed contractual terms

4.2   Explain the procedure for dealing with breaches of contract

Did you know?

In an article entitled 'Find suppliers for your business' Janet Attard stated "Better, faster, cheaper. Those three magic words can turn your hot prospects into happy customers. But in order for you to give your customers better products, faster service and lower rates, you have to develop a core group of reliable suppliers who cut you good deals on the products and services you buy."

Adapted from Find Suppliers for your Business, © Copyright Janet Attard. http://www.businessknowhow.com/startup/findsuppliers.htm

Key terms/words

Selecting Suppliers: finding good suppliers can be invaluable to a successful business. You may have been using several suppliers for a number of years, but it is always worth investigating the competition to see if you can get a better deal or service from others. Recommendations are a way of gathering a first impression and can even
save you money on your first few orders.

Contractual terms: these are the terms that the supplier sets and must be abided by in order to fulfil their contract with your business. If there are any issues then they (the supplier) could be in breach of the contract.

Monitoring supplier performance: it is important to monitor your suppliers to the business and if any problems arise to contact the supplier directly as soon as possible. You may find when completing the monitoring that a pattern emerges with the same issues again and again. This then would need to be identified to the supplier so that this can be resolved quickly. You may be tempted to change supplier.

Points to note

When selecting new suppliers you must consider many other issues as well as cost. Cost is important, but making a saving does not always mean that you get the same quality of service or products.
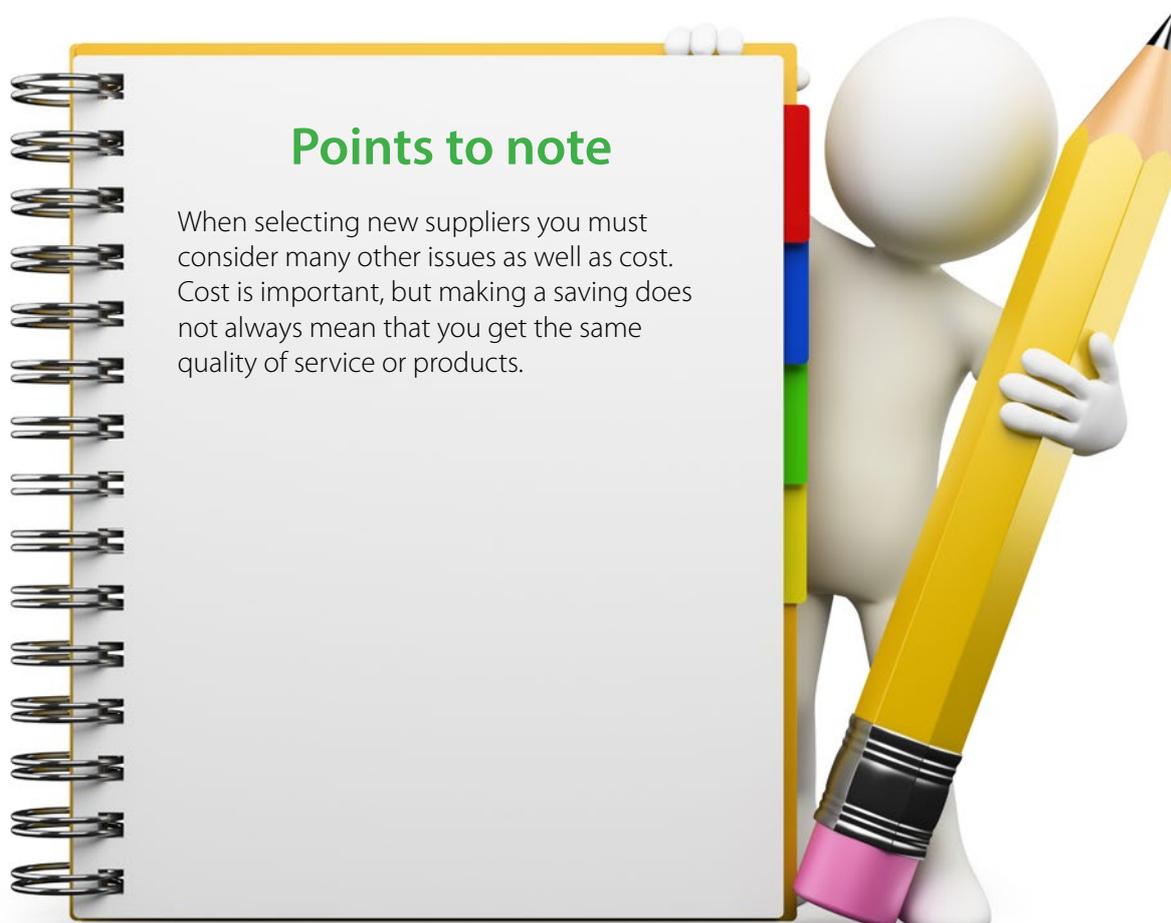
UNIT E16 (H/600/9738)

MANAGE A TENDERING PROCESS

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to manage a tendering process, including developing product or service specifications and tender guidelines, evaluating tenders and selecting a supplier to deliver the required products or services.

The unit is divided into six outcomes:

1. Understand tendering processes
2. Be able to draw up a specification for required products or services
3. Be able to write an invitation to tender document and communicate it to prospective suppliers
4. Understand how to respond fairly to pre-tender queries
5. Be able to evaluate received tenders
6. Be able to select a supplier and provide post-tender feedback

UNIT E16 (H/600/9738)

MANAGE A TENDERING PROCESS

Learning Outcome 1 - Understand tendering processes

Assessment criteria. I can:

1.1   Explain the legal requirements of a tendering process

1.2   Explain organisational tendering policies and processes

1.3   Explain how to seek specialist support for the tendering process

Learning outcome 2 - Be able to draw up a specification for required products or services

Assessment criteria. I can:

2.1   Consult with colleagues to identify and agree requirements for products or services

2.2   Draw up a specification that describes the products or services required

Activity

Meet with colleagues in order to determine their department's requirements for products or services, ensuring that formal minutes are made so that you can act upon the action points.

Learning Outcome 3 - Be able to write an invitation to tender document and communicate it to prospective suppliers

Assessment criteria. I can:

3.1   Write an invitation to tender outlining required specifications and organisational tendering processes.

3.2   Communicate the invitation to tender to prospective suppliers.

Learning Outcome 5 - Be able to evaluate received tenders

Assessment criteria. I can:

5.1   Establish criteria with which to evaluate received tenders

5.2   Receive, record and open tenders in line with stated tendering process

5.3   Seek clarification from prospective suppliers where necessary

5.4   Evaluate tenders against established criteria

Learning Outcome 6 - Be able to select a supplier and provide post-tender feedback

Assessment criteria. I can:

6.1   Offer a contract to the chosen supplier.

6.2   Inform unsuccessful suppliers of the outcome and provide feedback.

Did you know?

Roland Finch advised in an article entitled 'Tendering for construction projects' that businesses "should adopt and observe the key values of fairness, clarity, simplicity and accountability, as well as reinforce the idea that the apportionment of risk to the party best placed to assess and manage it is fundamental to the success of a project".

Adapted from Tendering for construction projects, © Copyright Roland Finch.
http://www.thenbs.com/topics/ContractsLaw/articles/tenderingForConstructionProjects.asp

Key terms/words

Tendering process: these are the processes that an organisation takes to select a supplier to supply products or services to a business, which will include preparation of business documentation.

Seeking clarification and Pre-tender queries: if you have any doubts about the potential tender with the successful supplier, do enquire at the first opportunity, making notes on the outcomes, which you may need to communicate with other managers.

Informing suppliers of unsuccessful bids: this is a challenging role but must be completed with professionalism, as the business may want to use the unsuccessful supplier for this bid in the future for another situation. Ensuring that you are clear on the main points, such as why they were unsuccessful would be useful.

Points to note

Being familiar with your organisation's procedures when seeking tenders is very important.
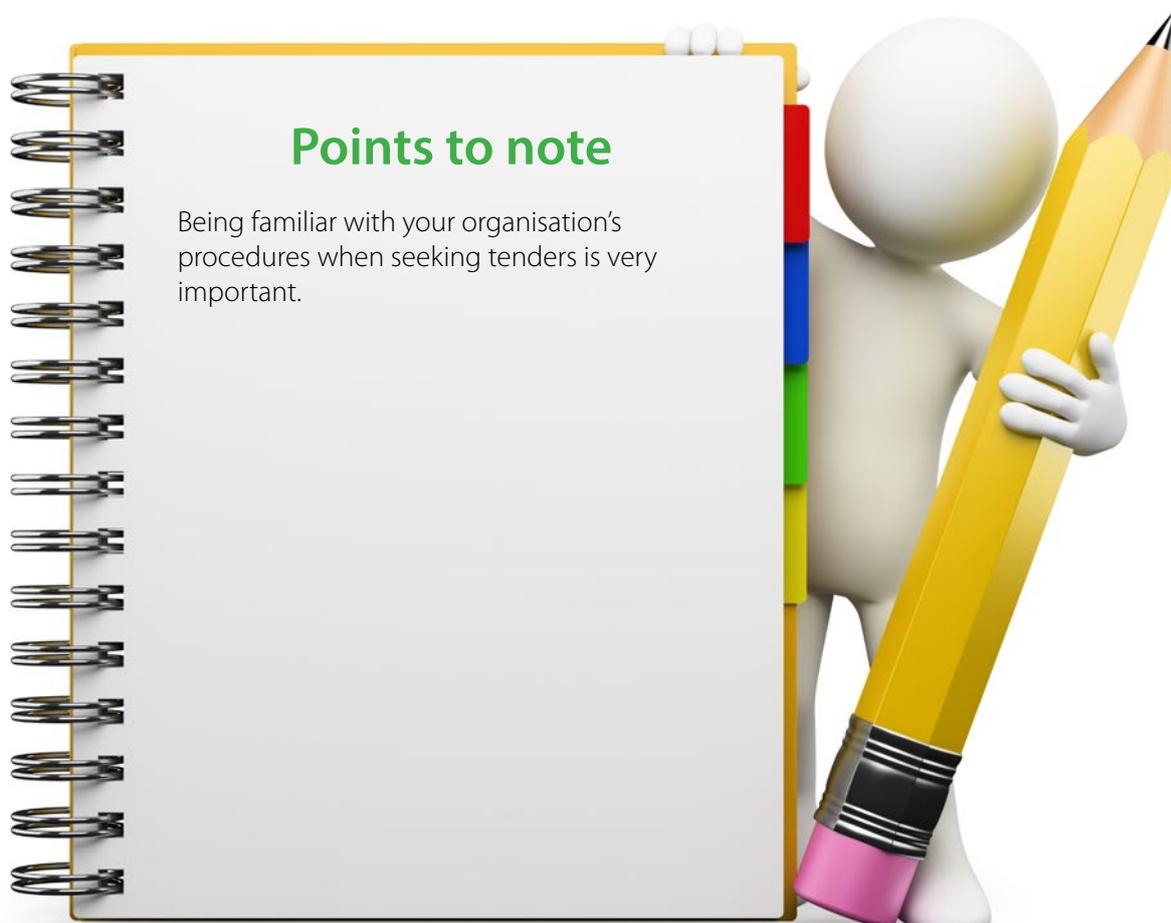
UNIT F1 (J/600/9750)

PLAN AND MANAGE A PROJECT

THIS IS AN OPTIONAL UNIT

This unit helps learners to clarify the scope and objectives of a project, develop a project plan, and consult and agree the plan with others.

The unit is divided into four outcomes:

1. Understand the principles, processes, tools and techniques of project management
2. Be able to agree the scope and objectives of a project
3. Be able to identify the budget in order to develop a project plan
4. Be able to implement a project plan
5. Be able to manage a project to its conclusion
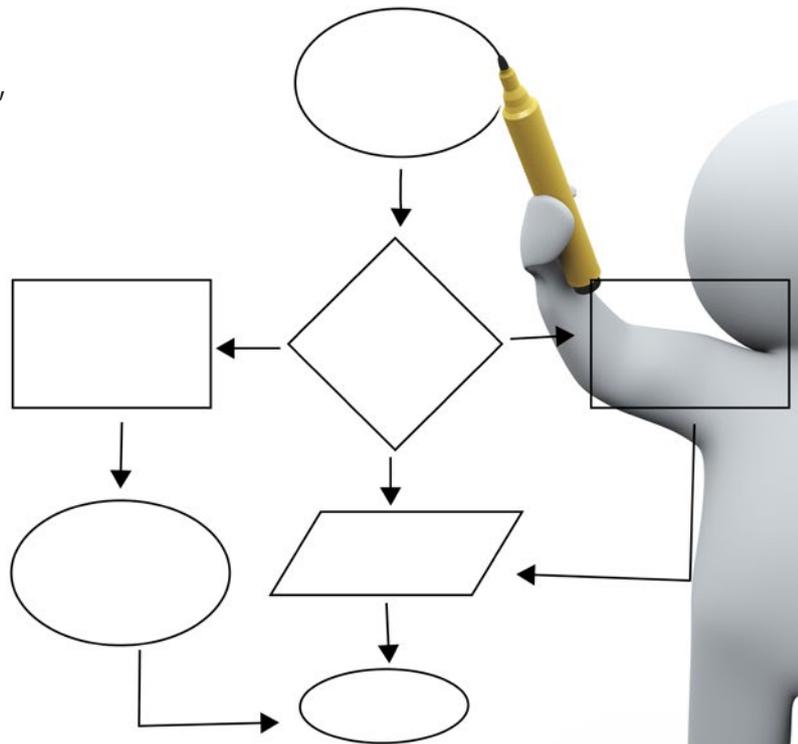
UNIT F1 (J/600/9750)

PLAN AND MANAGE A PROJECT

Learning Outcome 1 - Understand the principles, processes, tools and techniques of project management

Assessment criteria. I can:

1.1   Describe the roles and responsibilities of a project manager

1.2   Explain how to apply principles, processes, tools and techniques of project management

Learning outcome 2 - Be able to agree the scope and objectives of a project

Assessment criteria. I can:

2.1   Agree SMART (Specific, Measurable, Achievable, Realistic, and Time-bound) objectives and scope of the project with project sponsor(s) and stakeholders

Activity

Research a variety of different project management techniques so that you are familiar with them and their processes. You can then select the most suitable ones when required.

Learning Outcome 3 - Be able to identify the budget in order to develop a project plan

Assessment criteria. I can:

3.1   Identify budget and time-scales in order to develop the project plan with stakeholders.

3.2   Consult with stakeholders to negotiate the project plan.

3.3   Identify potential risks and contingencies.

3.4   Establish criteria and processes for evaluating the project on completion.

Learning Outcome 4 - Be able to implement a project plan

Assessment criteria. I can:

4.1   Allocate roles and responsibilities to project team members.

4.2   Provide resources identified in the project plan.

4.3   Brief project team members on the project plan and their roles and responsibilities

4.4   Implement a project plan using project management tools and techniques

Learning Outcome 5 - Be able to manage a project to its conclusion

Assessment criteria. I can:

5.1   Apply a range of project management tools and techniques to monitor, control and review progress.

5.2   Provide support to project team members.

Did you know?

'At its most fundamental, project management is about people getting things done' Dr Martin Barnes, APM President.

Adapted from What is Project Management, © Copyright Dr Martin Barnes, APM President.
http://www.apm.org.uk/WhatIsPM

Key terms/words

A range of tools and techniques: using such tools as critical path analysis and Gantt charts etc, will focus your attention to a more thorough detailed project management planning. These techniques will help you with scheduling, costs and other financials, as well as reporting your suggestions to management.

Objectives of project: having a clear vision for a project and being able to communicate your vision to others involved will enable the process to work more effectively.

Stakeholders: stakeholders are anyone who has anything to do with the organisation, from employees to suppliers, to people who live next door to the work place. All need to be considered when completing any project activities to do with the organisation.

Points to note

Allocating roles to the right people with the relevant strengths in a team is important.

Playing a supporting role when required is key to good project management.

Revisiting plans and making adjustments is fine. Don't see this as failing, but rather that it is more important the project is completed to a high standard and on time.
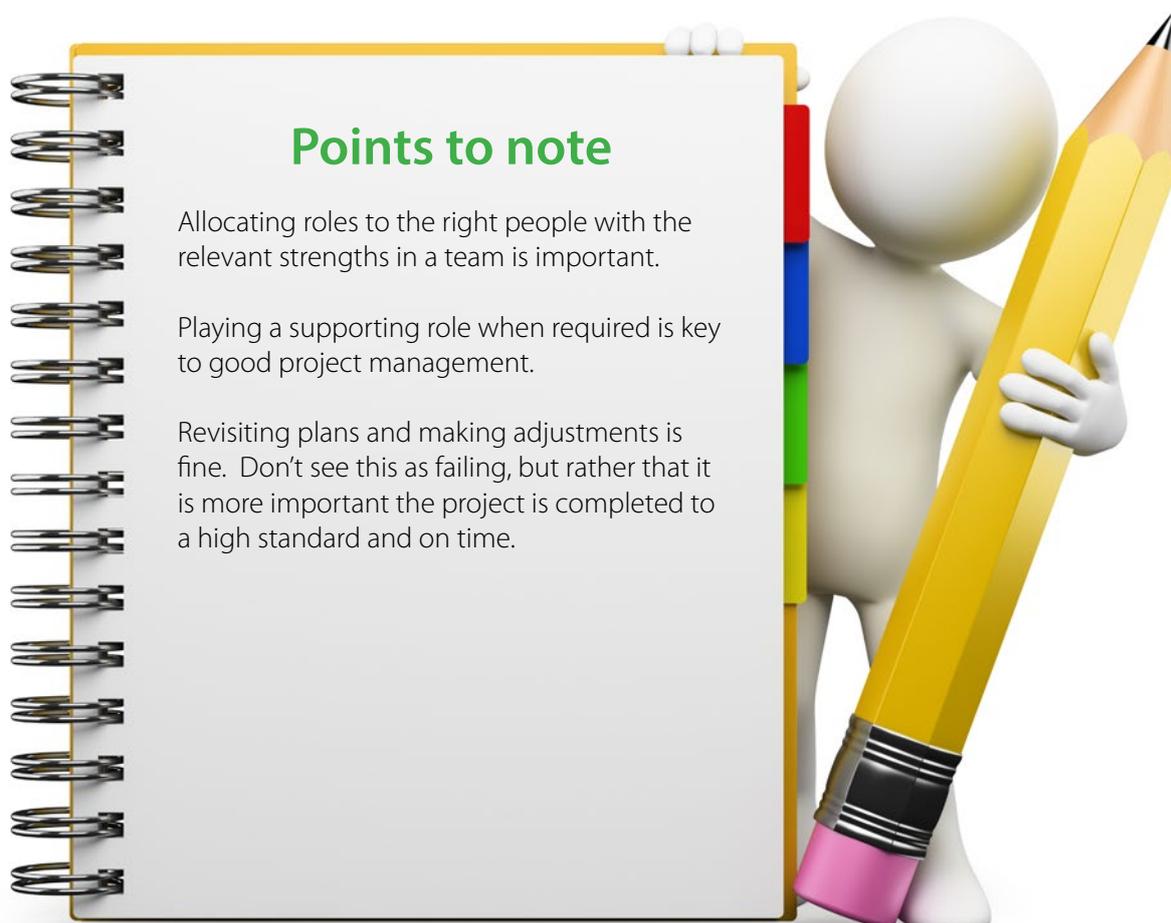
UNIT F4 (K/600/9790)

DEVELOP AND IMPLEMENT MARKETING PLANS

THIS IS AN OPTIONAL UNIT

This unit will ensure that the candidate can use a range of models and tools to produce a marketing strategy, derive and implement a marketing plan and monitor and evaluate the plan to determine future marketing activities. The candidate will also be able to communicate effectively with specialists in the design and production of the marketing strategy and plan.

The unit is divided into four outcomes:

1. Be able to identify and prioritise marketing objectives for own area of responsibility
2. Be able to produce a marketing strategy in own area of responsibility
3. Be able to produce and implement a marketing plan for own area of responsibility
4. Monitor and evaluate the marketing plan in own area of responsibility

UNIT F4 (K/600/9790)

DEVELOP AND IMPLEMENT MARKETING PLANS

Learning Outcome 1 - Be able to identify and prioritise marketing objectives for own area of responsibility

Assessment criteria. I can:

1.1   Analyse the organisation's business plan to identify marketing objectives for own area of responsibility

1.2   Explain the organisation's culture, vision and values

1.3   Analyse and prioritise marketing objectives

Learning outcome 2 - Be able to produce a marketing strategy in own area of responsibility

Assessment criteria. I can:

2.1   Describe and evaluate the target markets for own organisation's products or services

2.2   Identify and consult with marketing specialists if required

2.3   Identify marketing tools and models to develop a strategy

2.4   Develop a marketing strategy based on key success criteria for own area of responsibility
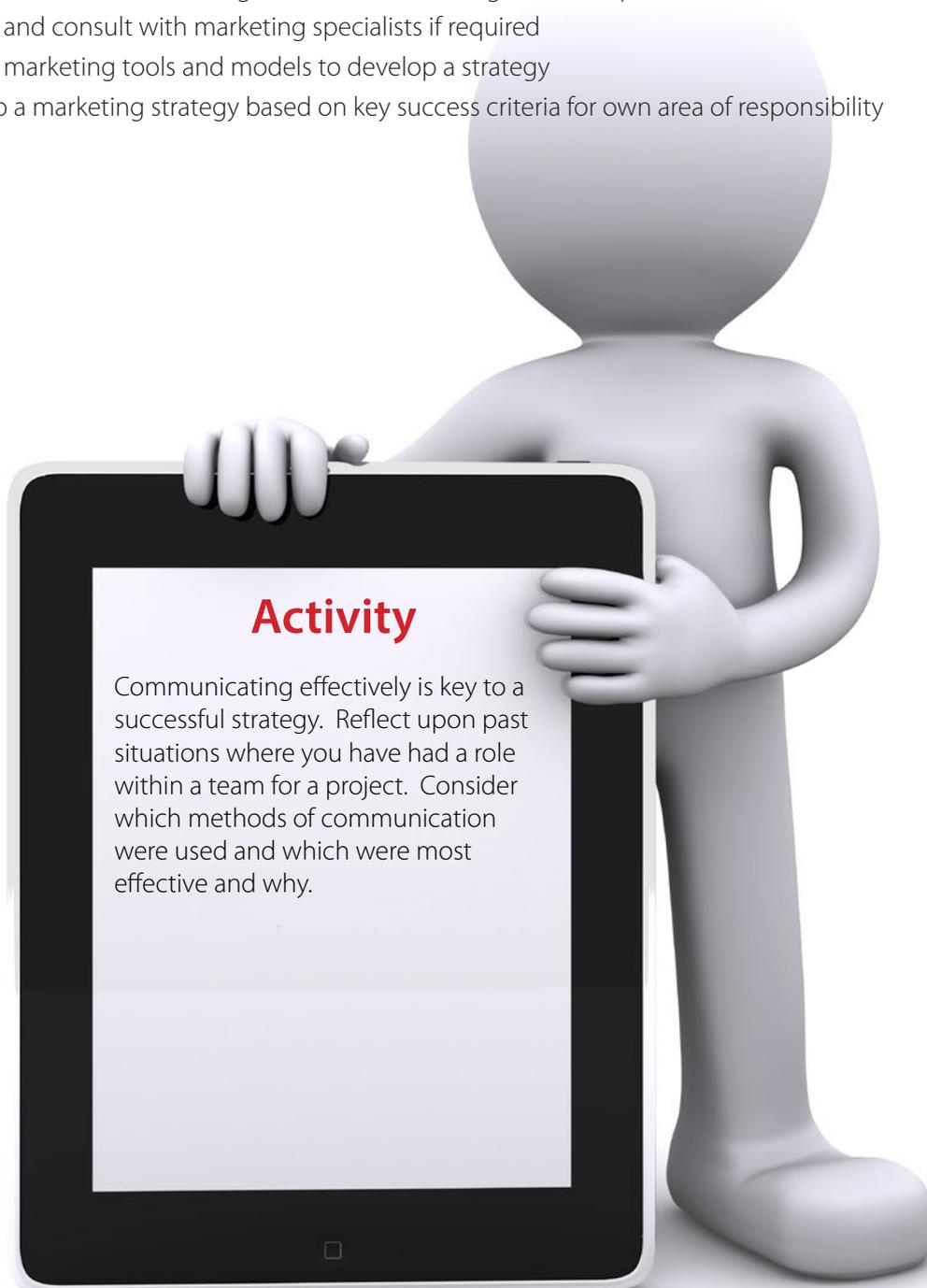
Activity

Communicating effectively is key to a successful strategy. Reflect upon past situations where you have had a role within a team for a project. Consider which methods of communication were used and which were most effective and why.

Learning Outcome 3 - Be able to produce and implement a marketing plan for own area of responsibility

Assessment criteria. I can:

3.1   Evaluate the resource requirements for the marketing plan

3.2   Produce a marketing plan based on the strategy

3.3   Agree roles and responsibilities of stakeholders

3.4   Communicate the marketing plan with key stakeholders

Learning Outcome 4 - Monitor and evaluate the marketing plan in own area of responsibility

Assessment criteria. I can:

4.1   Monitor progress of the marketing plan against business objectives.

4.2   Assess and evaluate the impact of the marketing plan.

4.3   Revise future marketing plans based on the impact evaluation.

Did you know?

Success and failure of any business is almost entirely down to how well a business is marketed. A good product is nothing without effective marketing.

Adapted from Marketing, © Copyright 2013 Streeter Consulting Limited. http://www.26mistakes.co.uk/#
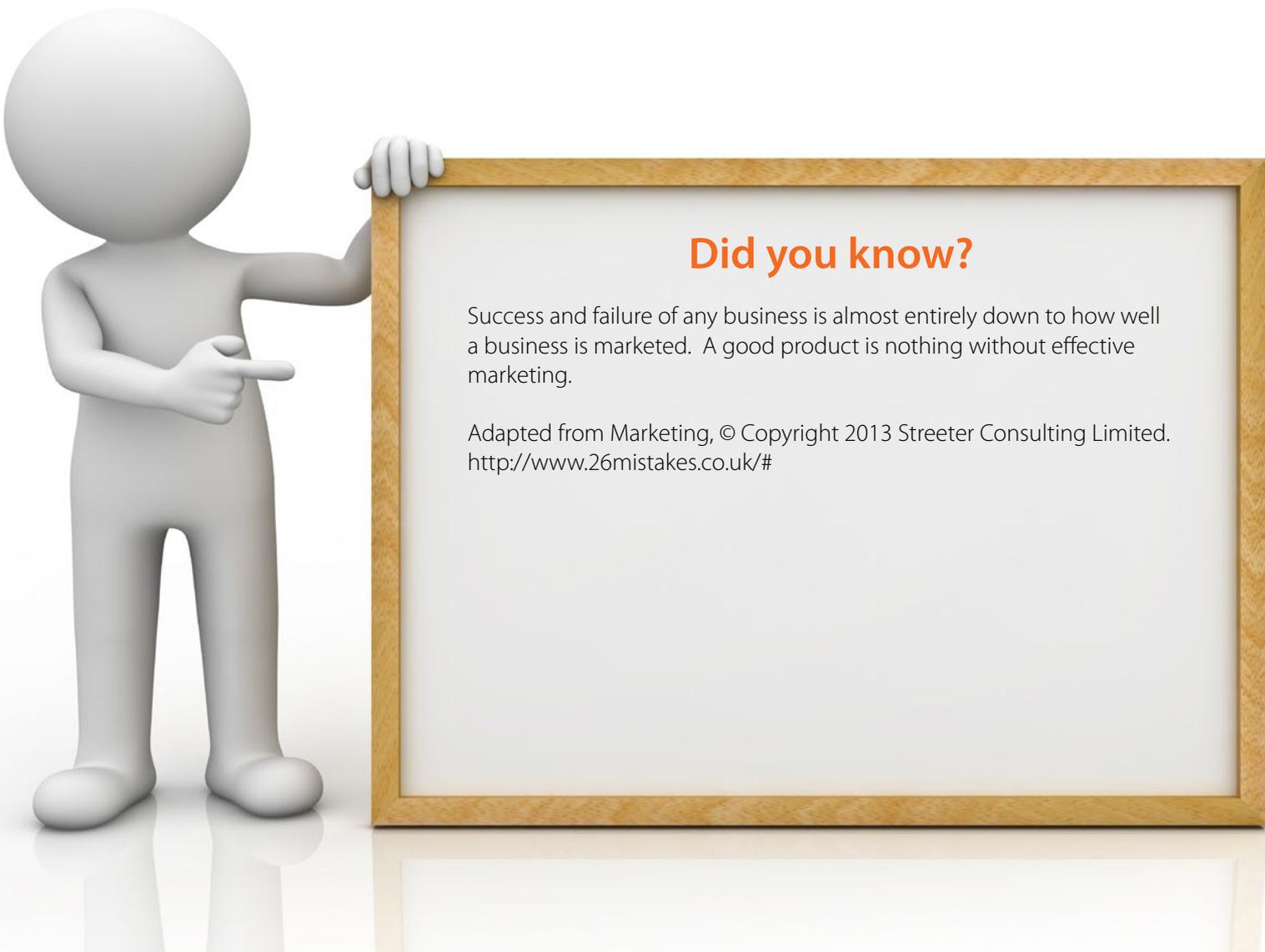
Key terms/words

Marketing activities: different types of actions that will be completed by the organisation with a marketing focus, in order to promote the business and gain the objectives.

Organisations culture: the way in which the business operates by influencing behaviour and performance at work.

Target markets: the types of people a product or service is aimed at, in which the business will perform a number of marketing activities with a given purpose.

Analysis data: there are several marketing tools that businesses use in order to review and analyse data, which could be useful when considering marketing plans.

Points to note

Consulting with experts early on in the process will ensure that ideas remain realistic.

Referring back to your marketing objectives will keep you and the team focused.

Prioritising tasks will enable all involved to concentrate on one activity at a time.
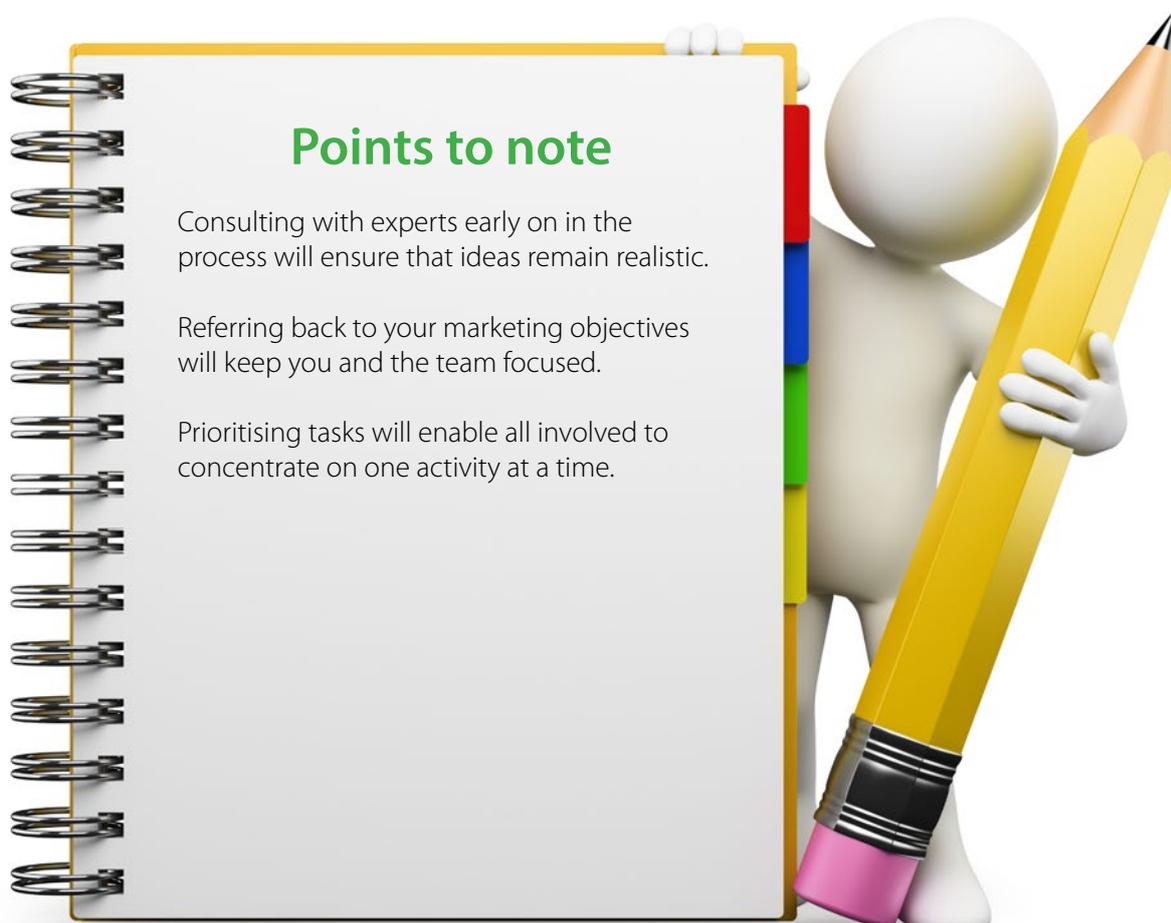
UNIT F9 (M/600/9791)

ANALYSE THE MARKET IN WHICH YOUR ORGANISATION OPERATES

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to analyse an organisation's market position and trends. Learners can analyse customer needs and communicate to key stakeholders.

The unit is divided into three outcomes:

1. Be able to analyse customers' needs
2. Be able to analyse the market using research tools and techniques
3. Be able to communicate research findings to inform managerial decisions

UNIT F9 (M/600/9791)

ANALYSE THE MARKET IN WHICH YOUR ORGANISATION OPERATES

Learning Outcome 1 - Be able to analyse customers' needs

Assessment criteria. I can:

1.1   Assess the economic environment in which your organisation operates

1.2   Evaluate your customers' needs and relate to own organisation

1.3   Analyse customer perception of own products/ services in comparison to competitors

Learning outcome 2 - Be able to analyse the market using research tools and techniques

Assessment criteria. I can:

2.1   Identify and utilise market research specialists if necessary

2.2   Analyse current and future macro and micro economic trends in own sector

2.3   Use recognised research tools to assess market trends and opportunities for growth
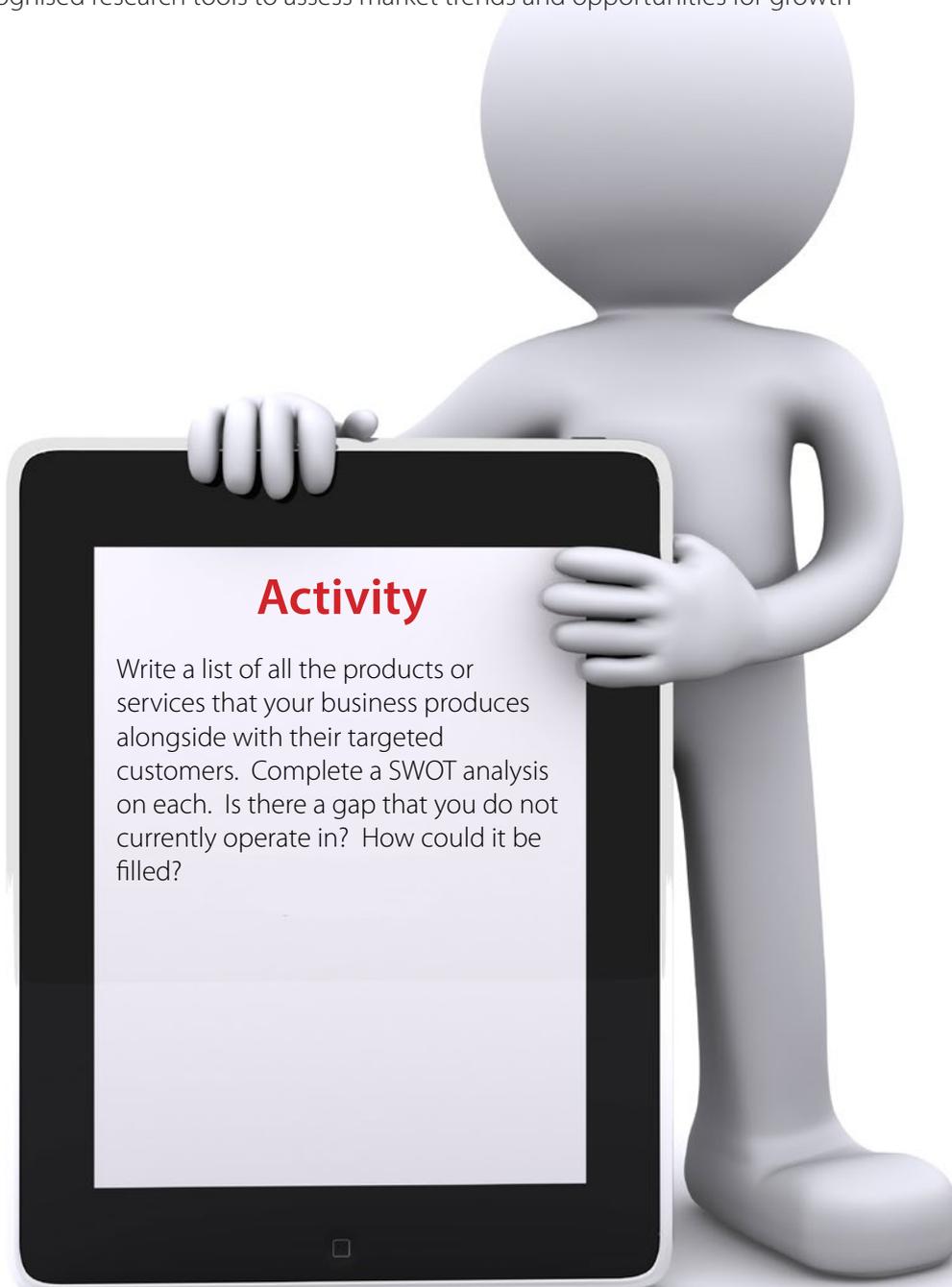
Activity

Write a list of all the products or services that your business produces alongside with their targeted customers. Complete a SWOT analysis on each. Is there a gap that you do not currently operate in? How could it be filled?

Learning Outcome 3 - Be able to communicate research findings to inform managerial decisions

Assessment criteria. I can:

3.1   Produce a report based on research findings.

3.2   Communicate the report to key individuals within own organisation.

3.3   Evaluate feedback from key individuals.

3.4   Revise and communicate updated report to key individuals.

3.5   Monitor the economic environment and changes in customers' needs.

Did you know?

According to a fascinating infographic entitled 'How Social Media is Ruining Our Minds,' over the course of the last ten years the average attention span has dropped from 12 minutes to a staggeringly short 5 minutes.

Adapted from SocialTimes, Attention Spans have dropped from 12 minutes to 5 minutes, © Copyright Neil Vidyarthi. http://socialtimes.com/attention-spans-have-dropped-from-12-minutes-to-5-seconds-how-social-media-is-ruining-our-minds-infographic_b86479

Key terms/words

Customer needs: identifying what potential customers require from a product or service will determine the success or failure of a product or service. Without customers wanting the item, the business could fail.

Research tools and techniques: being able to identify relevant information that is useful for background information, in order to make concentrated decisions, will enable you to create a good basis for your research. Wasting time on irrelevant research will not help the business.

Methods of presentation: considering the right presentational tool on how to present given information, could mean that management do not want to act upon your ideas from the extensive research you have completed. Give this careful consideration.

Points to note

Knowing your current market position will enable you to aim higher.

Analysing trends within your current market share could help you stay ahead of competitors and maybe improve your share.
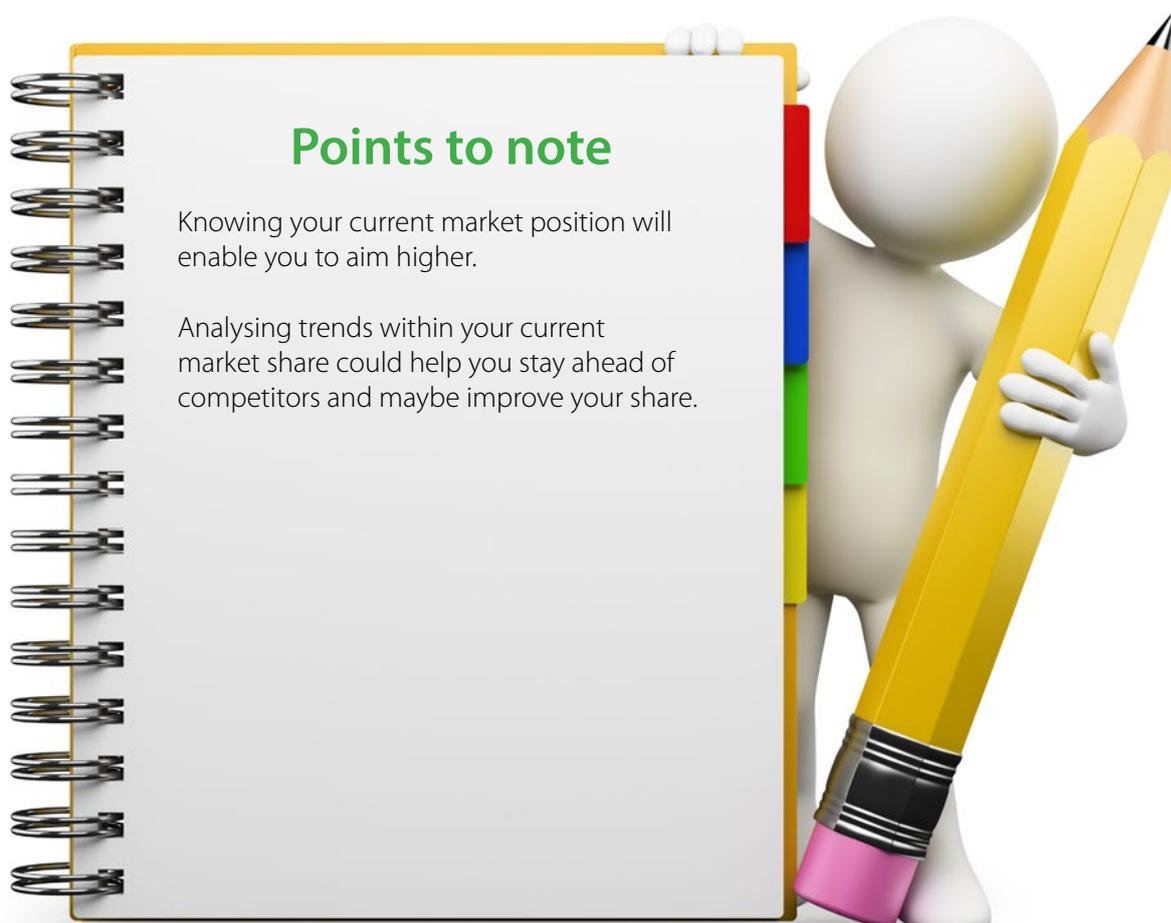
UNIT F11 (A/600/9793)

MANAGE THE ACHIEVEMENT OF CUSTOMER SATISFACTION

THIS IS AN OPTIONAL UNIT

This unit helps learners to understand the importance of monitoring customer service satisfaction levels to manage the achievement of customer satisfaction.

The unit is divided into five outcomes:

1. Be able to understand customer service standards required in own organisation
2. Be able to implement sustainable processes for customer satisfaction
3. Be able to manage and support colleagues in delivering customer service standards
4. Be able to manage and develop culture in own organisation to support customer service standards.
5. Be able to monitor customer service levels for continuous improvement

UNIT F11 (A/600/9793)

MANAGE THE ACHIEVEMENT OF CUSTOMER SATISFACTION

Learning Outcome 1 - Be able to understand customer service standards required in own organisation

Assessment criteria. I can:

1.1   Explain customer service standards within own organisation.

1.2   Determine customer service best practice in own sector using research techniques

Learning outcome 2 - Be able to implement sustainable processes for customer satisfaction

Assessment criteria. I can:

2.1   Define sustainable processes taking into account environmental issues

2.2   Identify sustainable processes to support customer service standards

2.3   Produce a plan for implementation.

2.4   State customer service standards with relevant key stakeholders

Activity

Create a Customer satisfaction survey to give to random customers over a period of time and analyse the results. Implement any changes that are necessary in order to achieve maximum customer satisfaction.

Learning Outcome 3 - Be able to manage and support colleagues in delivering customer service standards

Assessment criteria. I can:

3.1   Communicate customer service roles and responsibilities with employees in own organisation.

Learning Outcome 4 - Be able to manage and develop culture in own organisation to support customer service standards

Assessment criteria. I can:

4.1   Evaluate the culture in own organisation

4.2   Identify techniques for improving motivation amongst employees

4.3   Describe motivational strategies for improving customer service standards

Did you know?

Business coaching expert and growth strategist Paul Lemberg is the President of Axcelus Consulting - Advanced Business Acceleration for Entrepreneurs. He stated "How can you build loyalty and gain repeat business? With two customer words: service and communication".

Adapted from Which Is Better: New Customers or Repeat Business? © Copyright Paul Lemberg.
http://www.paullemberg.com/repeatcustomers.html

Key terms/words

Customer satisfaction: if customers receive good customer service and are therefore satisfied, they are more likely to return to the business in the future, creating repeat business, which in turn will create more profit for your organisation.

Best practice: discovering through research what competitors do for best practice will enable you to remain competitive.

Motivation: this is important in a team to ensure that all colleagues are committed to reach the same goal. Suitable techniques will need to be researched to keep motivation to a high level and built into the budget.

Points to note

Positive leadership is paramount in successful organisations.

Good leaders should inspire employees to strive for the same organisational goals creating a good working atmosphere within the business.
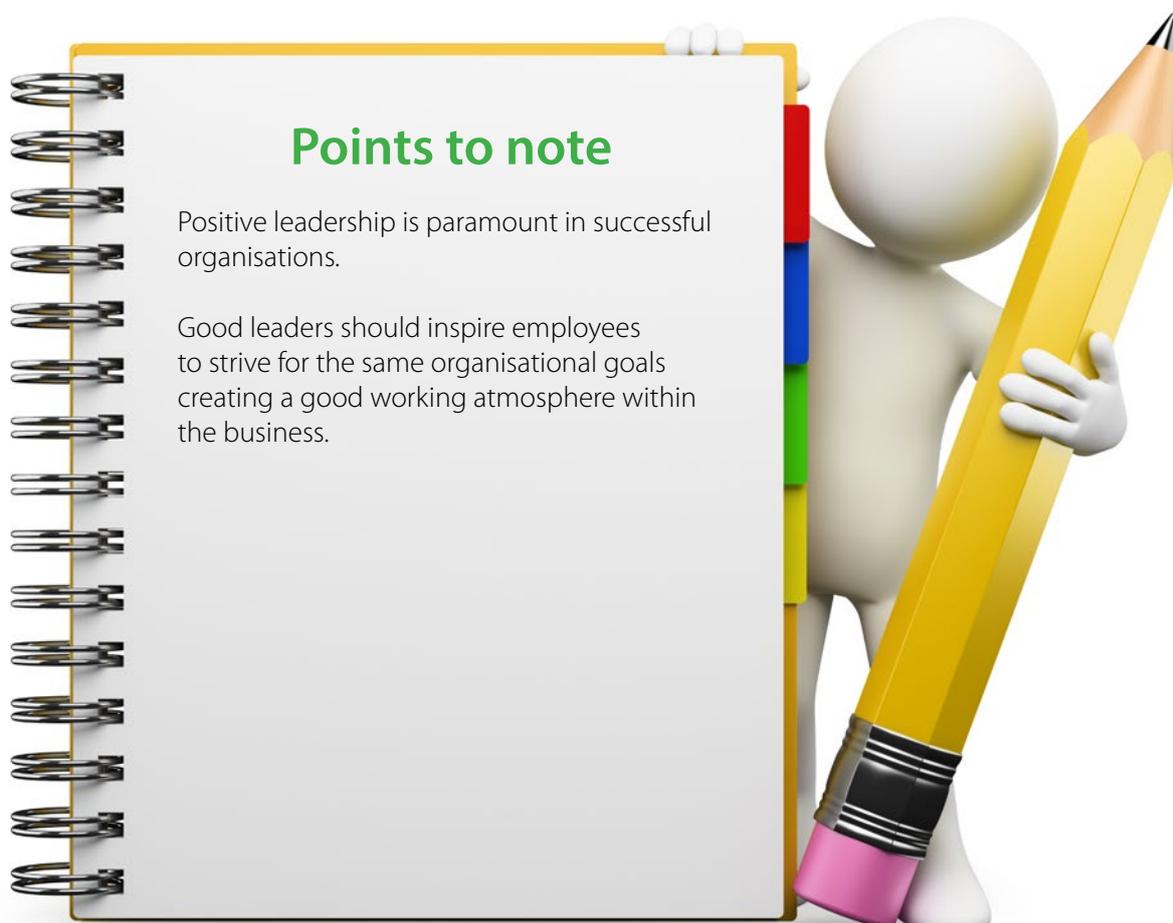
UNIT F14 (Y/600/9798)

PREPARE FOR AND SUPPORT QUALITY AUDITS

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners understand the quality standards and are able to participate in a quality audit and take correction action.

The unit is divided into five outcomes:

1. Understand the quality standards and procedures that apply to own area of responsibility
2. Be able to monitor work in own area of responsibility against quality standards and procedures
3. Be able to prepare for a quality audit in own area of responsibility
4. Be able to discuss quality audit findings with the auditor
5. Be able to complete agreed actions following a quality audit

UNIT F14 (Y/600/9798)

PREPARE FOR AND SUPPORT QUALITY AUDITS

Learning Outcome 1 - Understand the quality standards and procedures that apply to own area of responsibility

Assessment criteria. I can:

1.1   Describe the quality standards and procedures that apply to own area of responsibility

Learning outcome 2 - Be able to monitor work in own area of responsibility against quality standards and procedures

Assessment criteria. I can:

2.1 Select and apply methods for monitoring work

Activity

Research and understand the main differences between management audits and quality audits so that you are clear.
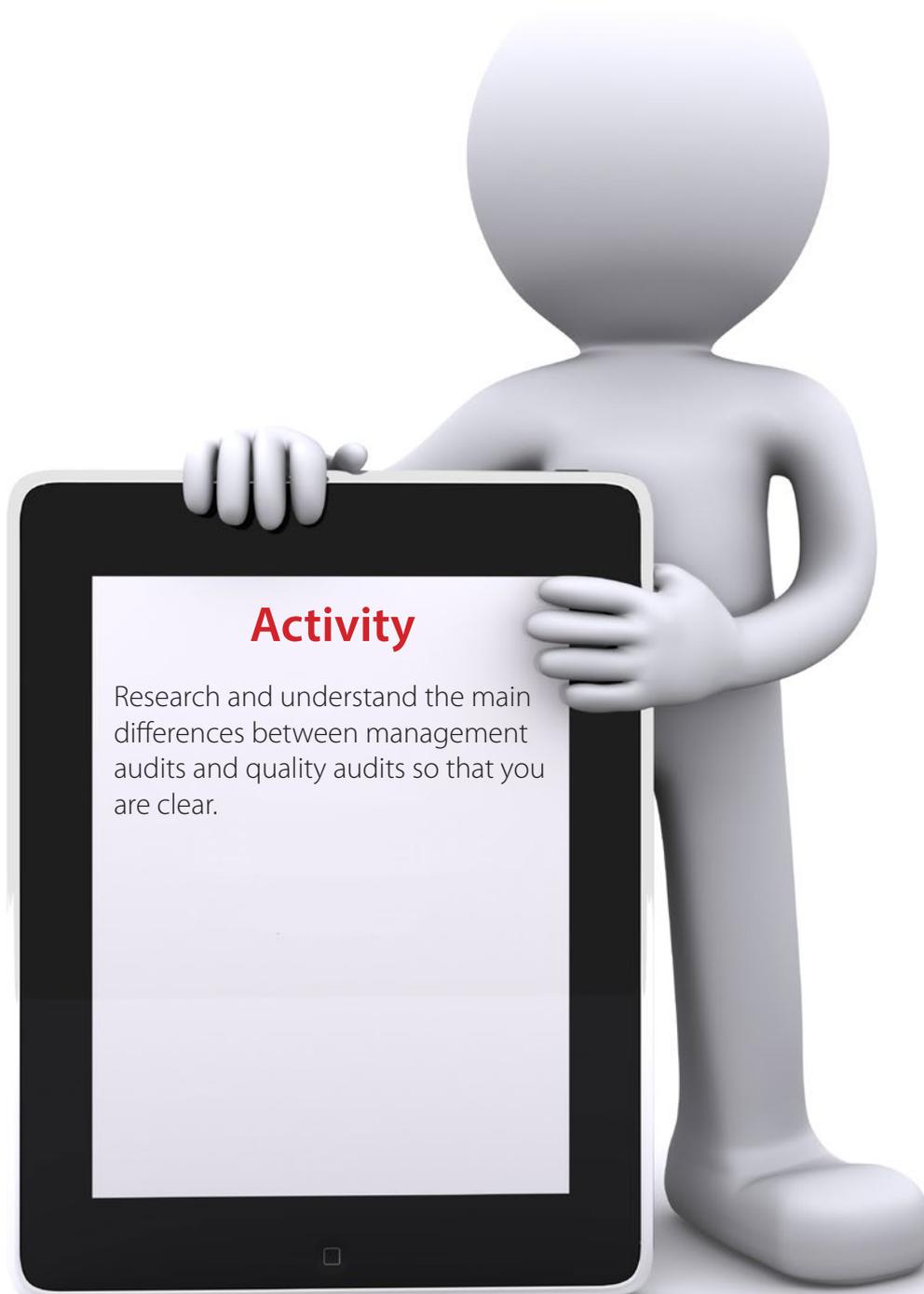
Learning Outcome 4 - Be able to discuss quality audit findings with the auditor

Assessment criteria. I can:

4.1   Discuss with the auditor the results of the audit and identify any areas for improvement

4.2   Agree corrective actions to remedy any identified issues, and set a date for their implementation

Learning Outcome 5 - Be able to complete agreed actions following a quality audit.

Assessment criteria. I can:

5.1   Take correction action based on quality audit findings

Did you know?

Three basic evaluation methods exist for any work activity: inspection, compliance auditing and management auditing.

Adapted from Management Auditing, © Copyright Dennis R. Arter.
http://www.qualitydigest.com/april00/html/management.html
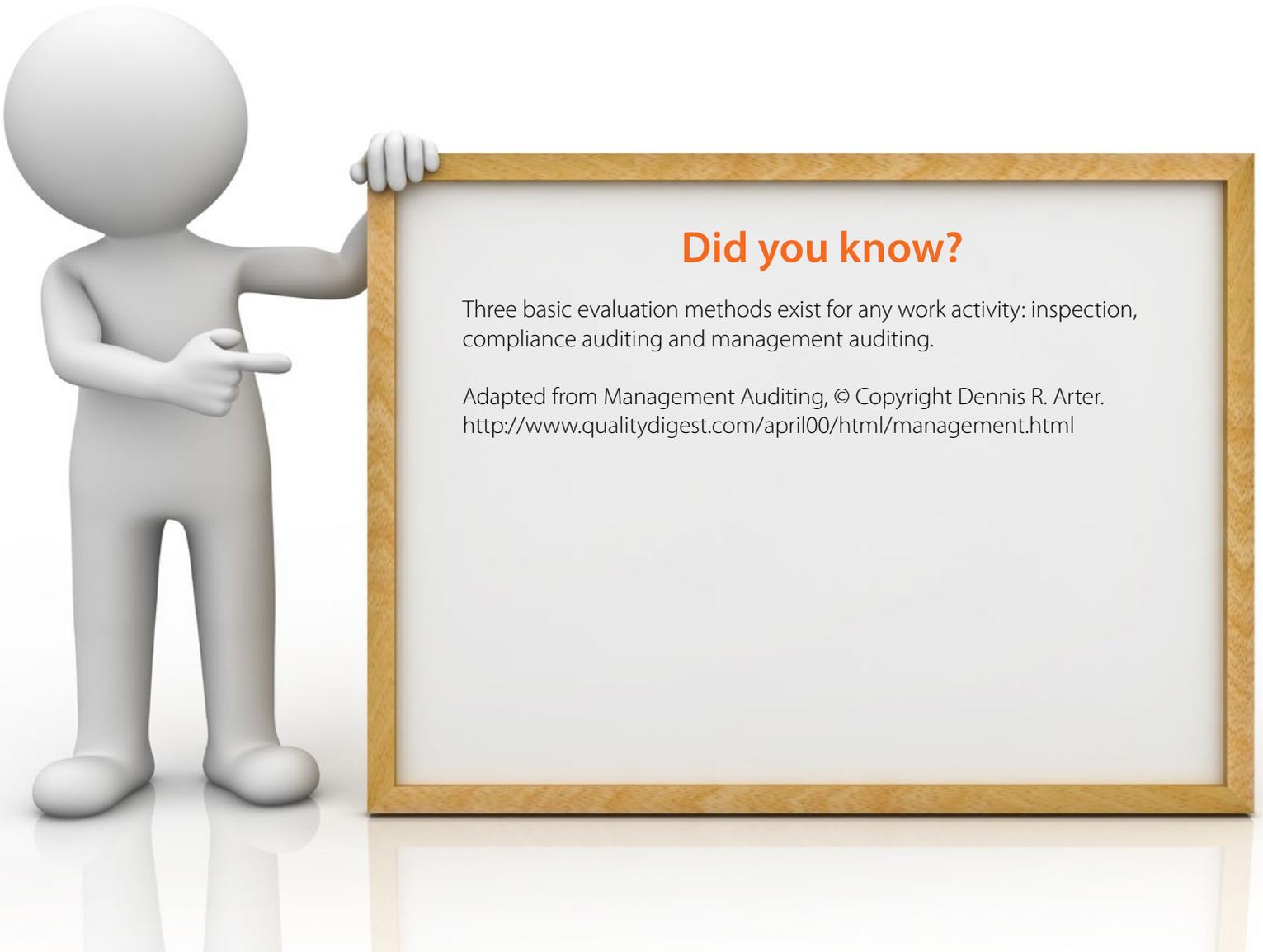
Key terms/words

Quality audits: a way a business examines the current processes that the organisation's uses within an agreed time scale and alternatives suggested if appropriate.

Self-regulating: an organisation that holds some authority over a business or potentially a profession, in order to keep the business 'in order'.

Identifying issues: being able to identify certain processes that may pose a problem for the business can only be positive for an organisation.

Focus groups: groups of people who are able to discuss a given topic and focus on the issues to a given cause.
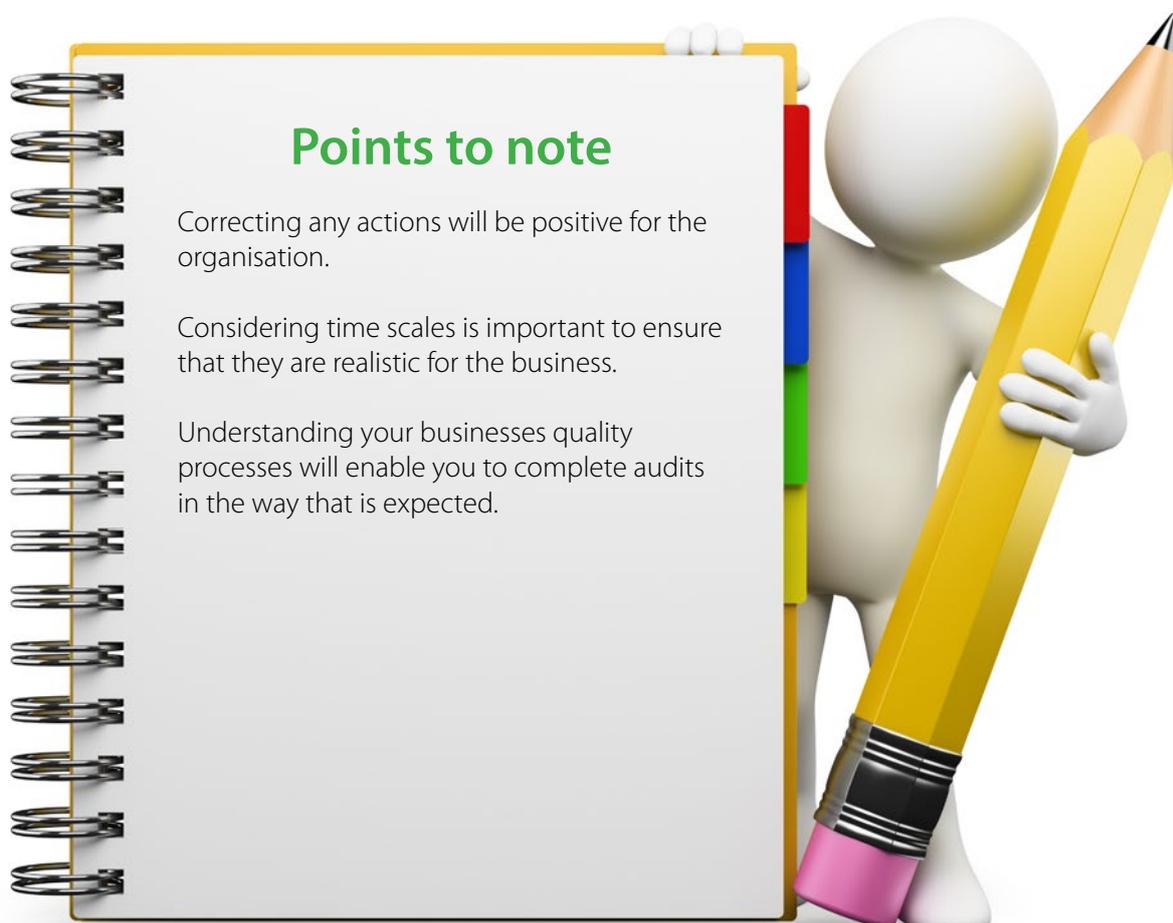
Points to note

Correcting any actions will be positive for the organisation.

Considering time scales is important to ensure that they are realistic for the business.

Understanding your businesses quality processes will enable you to complete audits in the way that is expected.

UNIT F17 D/600/9804

MANAGE CUSTOMER SERVICE IN OWN AREA OF RESPONSIBILITY

THIS IS AN OPTIONAL UNIT

This unit will ensure that learners are able to explain customer service standards to support staff and monitor customer service performance in own area of responsibility.

The unit is divided into four outcomes:

1. Be able to establish and communicate measurable customer service standards for own area of responsibility
2. Be able to support staff in meeting customer service standards
3. Be able to monitor and evaluate customer service performance, systems and processes.

UNIT F17 D/600/9804

MANAGE CUSTOMER SERVICE IN OWN AREA OF RESPONSIBILITY

Learning Outcome 1 - Be able to establish and communicate measurable customer service standards for own area of responsibility

Assessment criteria. I can:

1.1 State organisational, legal and regulatory requirements for customer service

1.2 Explain expected standards for customer service performance to employees in own area of responsibility

1.3 Describe measurement criteria to monitor customer service performance

Learning outcome 2 - Be able to support staff in meeting customer service standards

Assessment criteria. I can:

2.1   Identify staff and other resources to meet customer service standards

2.2   Communicate roles and responsibilities to employees and provide support

2.3   Describe how to resolve customer service queries within own organisational policy

Activity

Create several easy to use/follow documents that show the expectations required from staff in terms of: point of service provision, response times with reasons, delivery times, referrals etc. It would also be useful to have a list of colleagues with specialist knowledge so that you could direct customers to the relevant personnel if required.

Learning Outcome 3 - Be able to monitor and evaluate customer service performance, systems and processess

Assessment criteria. I can:

3.1   Monitor customer service performance against established criteria

3.2   Analyse feedback from staff and customers on the quality of customer service

3.3   Evaluate customer feedback and identify areas for improvement

3.4   Recommend changes to customer service processes or standards based on performance evaluation

Learning outcome 4 - Be able to assess own leadership performance

Assessment criteria. I can:

4.1   Assess feedback on own leadership performance

4.2   Evaluate own leadership performance
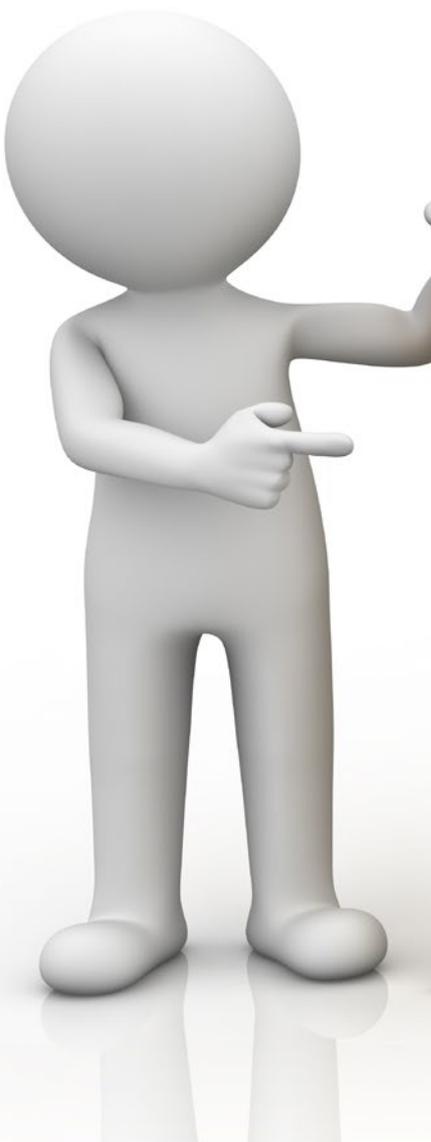
Did you know?

In an article entitled '25 Customer Experiences Statistics for 2011 (and beyond)' Authored by Andy Hanselman, stated that: 24% of UK customers have stopped doing business with a company within the last six months due to a bad customer experience. Key reasons:

23% Unfair fees or charges

22% Poor product or service quality

19% Rude or disinterested employees

12% Couldn't get hold of anyone to deal with my problem

7% Discounts for new customers but not for existing customers

4% Inadequate return or refund policy

5% Out of territory call centres

1% Inadequate environmental policy

7% other

'Poor experience' has forced over 10 million consumers in the UK to switch suppliers in the last six months alone. The main culprits for this switching epidemic are unfair fees or charges, poor product or service quality and rude or disinterested employees.

Adapted from 25 Customer Experience Statistics for 2011 (And Beyond!), © Copyright Andy Hanselman. http://www.andyhanselman.com/2010/11/29/25-customer-experience-statistics-for-2011-and-beyond/

Key terms/words

Customer service standards: understanding the level of service required to please your customers must be explained to teams, so that all customers are treated to the same high standard.

Sharing special knowledge: giving staff with specific knowledge about products or services that your business produces the opportunity to share their own knowledge, will help others develop their own understanding.

Analysing feedback: this is a useful tool to try to improve the service that customers receive. There are always improvements to be made.

Points to note

Identifying objectives will enable you and the team to focus on these main goals for the good of the organisation.

Having support available for colleagues will give them confidence in situations.
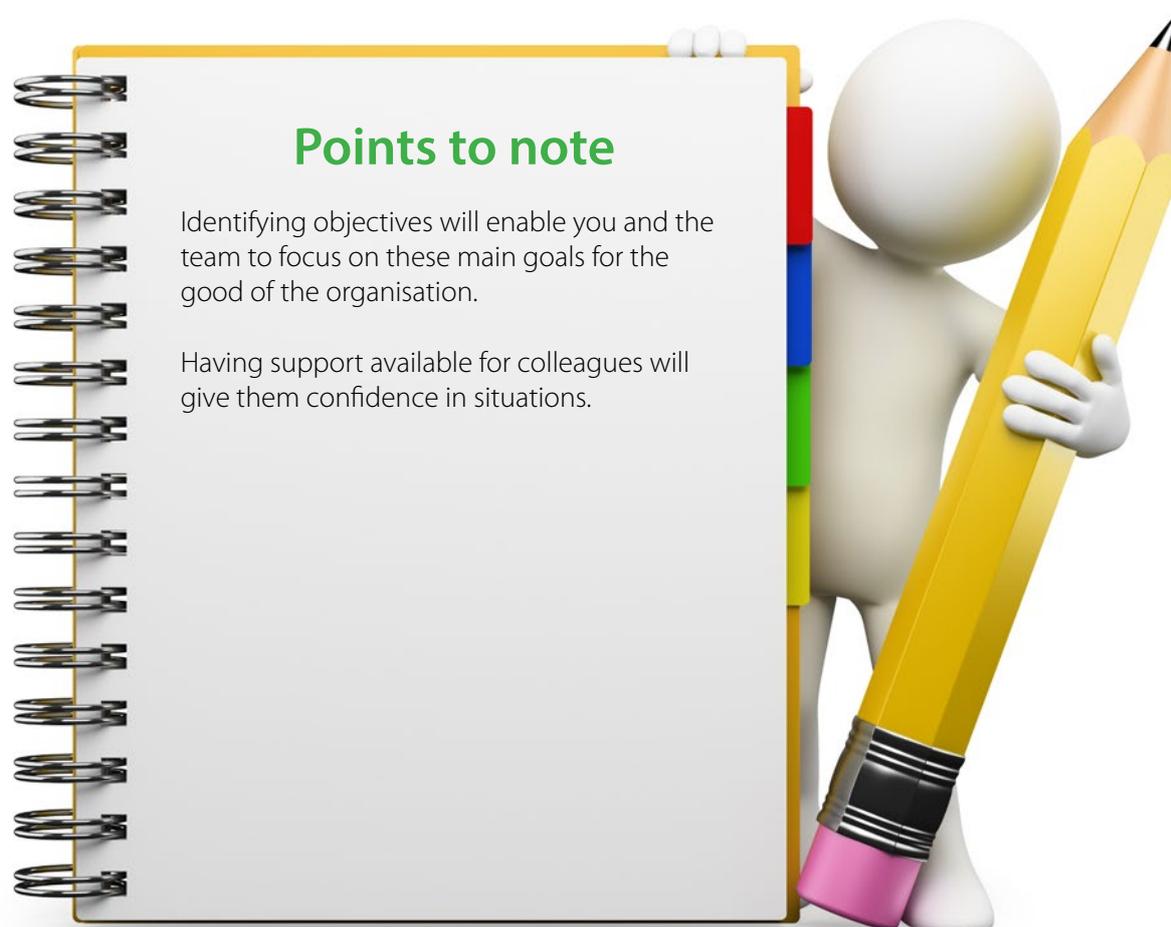
To give us feedback on, or ideas about the OCR resources you have used, email resourcesfeedback@ocr.org.uk

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