SPECIFICATION

IAO LEVEL 2 DIPLOMA IN TEAM LEADING

QUALIFICATION NUMBER: 601/3513/X

Innovate Awarding is an Ofqual regulated awarding organisation with an innovative and dynamic approach. We develop off-the-shelf, customised and fully bespoke qualifications across a growing number of sectors – all on the Regulated Qualifications Framework (RQF).

Our portfolio is always growing and we currently have qualifications in the following sectors:

Active Leisure	**Health and Social Care**
Business and Management	**Hospitality and Catering**
Childcare	**IT**
Employability	**Logistics**
Retail	**Education and Training**

We currently offer over 100 qualifications and we're continuously developing and diversifying our portfolio. Please visit our website regularly to keep up-to-date
www.innovateawarding.org.

This document will be updated if there are any changes, so it is important to make sure you are working from the most up-to-date version, which is available to download from our website.

This specification also provides details on administration, quality assurance policies and the requirements as well as responsibilities that are associated with the delivery of vocational qualifications.

Innovate Awarding is an Ofqual-regulated Awarding Organisation in England.

If you have any questions regarding qualifications in general, aspects of specific qualifications or our quality assurance policies and procedures, visit our website where a lot more information is available.

If you cannot find what you are looking for on our website, please call or email our customer support team:

Telephone: 0117 314 2800
Email: contactus@innovateawarding.org

"We work with a wide variety of organisations such as employers, training providers, FE colleges and
Sector Skills Councils and develop off-the-shelf, customised and bespoke qualifications."

Qualification summary

Qualification Accreditation Number (QAN)	601/3513/X
Qualification review date	31st May, 2023
Guided Learning Hours (GLH)	Minimum 201 hours
Total Qualification Time (TQT)	Maximum 400 hours
RQF level	2
Qualification credit value	40 credits
Minimum credits at/above level	40 credits
Assessment requirements	Portfolio of Evidence
	This qualification is internally assessed and internally quality assured by Centre staff and externally quality assured by Innovate Awarding External Quality Advisors (EQAs).
Aims and objectives of the qualification	The Level 2 Diploma in Team Leading is based on the Management and Leadership National Occupational Standards (NOS). It is suitable for those who are entering a management role, or who have the ability and the opportunity to demonstrate recognisable management and leadership skills. This qualification will provide the knowledge and skills team leaders need to perform effectively and to bring real benefits to their employer and is applicable to any sector.
Entry guidance	There are no formal entry requirements for this qualification. This qualification is suitable for those who work within a number of industries and job roles. It provides Learners with an opportunity to demonstrate their competence and knowledge in a wide range of job roles.
Progression opportunities	Learners who achieve this qualification could progress into or within employment in a number of areas as team leaders or supervisors, and/or continue their study in this or other areas. Learners who complete this qualification may go on to further study in related areas such as:

- Level 3 Diploma in Business Administration
- Level 3 Diploma in Management

Funding

For details on eligibility for government funding please refer to the following websites:
http://www.education.gov.uk/section96/
https://www.gov.uk/government/organisations/education-and-skills-funding-agency

Innovate Awarding

When you work with Innovate Awarding, you're working with an awarding organisation that sets itself apart – a dynamic company with a collaborative approach to doing business. We're consultative and innovative…everything that our customers say they want an awarding organisation to be.

We're easy to work with, committed and passionate about exceeding our customers' expectations. We're not tied down by bureaucracy and red tape and can think outside the box and respond quickly to our customers' needs.

We have a Performance Pledge that details guaranteed response times. Copies of these can be found on our website www.innovateawarding.org.

Feedback

Your feedback is very important to us. We're always open to suggestions when it comes to enhancing and improving our services, products and systems. Email us at contactus@innovateawarding.org or call us on 0117 314 2800.

Complaints

If we do get things wrong, we'll make every effort to resolve your issues quickly and efficiently. If you'd like to raise a formal complaint then we recommend you read our Complaints Procedure which can be found on our website.

Fees

Our fees structure is transparent and straightforward. Our fees are published on our website in a clear format with no hidden charges. Unlike other awarding organisations, we do not charge an annual centre fee. Visit our website to compare our fees.

Enquiries and appeals

We recognise that sometimes decisions are made that a centre (or learner) may wish to appeal. We have an Enquiries and Appeals Policy and Process on our website that sets out guidelines on grounds for appeal and the process.

Data Protection

Innovate Awarding takes the protection of data seriously; we have a data protection statement outlining how we and our centres, comply with the current legislation on data protection. This statement can be found on our website.

Equality and Diversity

Innovate Awarding is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation (Equality Act 2010) and EU directives.

Centres are required, as conditions of approval, to use an equality and diversity policy that works together with ours and that they maintain an effective complaint and appeals process. We expect centres to tell learners how to find and use their own equality and diversity and appeals processes. For information, please visit our website.

Reasonable Adjustment and Special Consideration

All learners must be treated fairly and equally and be given every opportunity to achieve our/the qualifications. A copy of our policy on Reasonable Adjustments and Special Considerations, and application form, can be found on our website.

Malpractice and Maladministration

Innovate Awarding has a responsibility to do everything it can to prevent any malpractice or maladministration from occurring, and where it has already occurred, ensuring action is taken proportionate to the gravity and scope of the occurrence.

A copy of our policy and procedure on Malpractice and Maladministration is available on our website.

Recognition of Prior Learning (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification or unit. Innovate Awarding have produced guidance on RPL and this can be found within our Information and Guidance for Centres on our website.

Please note the above is not a comprehensive guide to running qualifications. Once approved centres must adhere to the Centre Agreement and Information and Guidance for Centres.

The Regulated Qualifications Framework (RQF)

What is the RQF?

The Regulated Qualifications Framework (RQF) is an Ofqual regulated system of cataloguing qualifications. Qualifications on the RQF can be found by their size or level. Qualifications at a given level can differ depending on their content and purpose.

All of Innovate Awarding's qualifications are on the RQF.

Qualification Level

The level reflects the challenge or difficulty of the qualification. There are eight levels of qualification from 1 to 8, supported by three "Entry" levels.

Qualification Size

The size of a qualification reflects the estimated total amount of time it would take the average learner to study and be assessed. The size of a qualification is expressed in terms of Total Qualification Time (TQT). The time spent being taught or supervised, rather than studying alone, is the Guided Learning Hours (GLH).

Qualifications can sit at different levels, but require similar amounts of study and assessment. Similarly, qualifications at the same level can take different amounts of time to complete.

SKILLS CFA ASSESSMENT STRATEGY

Competence units (S/NVQ) for Business Administration, Customer Service and Management and Leadership

1. Introduction

This Assessment Strategy provides principles and guidance to Awarding Organisations for the assessment of competence-based units and qualifications (including Scottish Vocational Qualifications and National Vocational Qualifications) within Business Administration[1], Customer Service and Management and Leadership in England, Scotland, Wales and Northern Ireland.

This document outlines Skills CFA principles in regards to:

- external quality control of assessment
- requirements of assessor and verifiers
- evidence
- employer direct model

These principles are in addition to the generic criteria that Awarding Organisations must meet for delivery of qualifications as required by the qualification regulators, for example Ofqual's Regulatory Arrangements for the Qualifications and Credit Framework and any regulatory requirements specified by the SQA Accreditation.

This strategy should only be used for the assessment of competence-knowledge based units and qualifications. Awarding Organisations may assess knowledge-only units as they see fit.

2. External quality control of assessment

The quality of the assessment process is the responsibility of Awarding Organisations. However, Skills CFA encourages flexibility and innovation of approach, alongside robust systems to support quality control. Awarding Organisations are also encouraged to detail their approach to external verification, risk assessment and data requests.

2.1 External verification

- Awarding Organisations are responsible for the competence of external verifiers. It is the responsibility of Awarding Organisations to monitor centres' performance in accordance with regulatory requirements.

- Awarding Organisations must consistently apply external verification processes at all assessment centres delivering competence-based qualifications. These should be underpinned by standard risk assessment and risk management processes.

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[1] Or Business & Administration in Scotland

2.2   Risk assessment

- Awarding Organisations must carry out standard risk assessments for all qualification assessment centres that are delivering competence-based qualifications. Identified risks must be managed appropriately.

- Awarding Organisations must retain evidence to prove that a risk assessment has been carried out for each approved centre, and that a strategy to minimise any identified risk has been implemented.

2.3   Data requests

- Each quarter, Awarding Organisations must provide registration and achievement data at all qualification levels (1 to 7) and unit levels (where possible) to Skills CFA.

3. Requirements of assessors, external and internal verifiers

Candidates may be assessed, moderated or verified at work either by several appointed individuals.

a.   Assessors

The primary responsibility of an Assessor is to assess candidates' performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria.

It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates.

To be able to assess candidates, Assessors must:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. An Assessors working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period.

- be "occupationally competent". Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed.

- have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process.

It is the responsibility of approved centres to select and appoint assessors.

3.2 External quality assurer (EQA)[2]

The primary responsibility of EQAs is to assure quality of internal verification and assessments across the centres for which they are responsible. EQAs must have a thorough understanding of quality assurance and assessment practices, as well as in-depth technical knowledge related to the qualifications that they are externally verifying.

EQAs must:

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA[3] and should be supported by a qualified EQA throughout their training period.

- be occupationally competent. EQAs must demonstrate sufficient and current understanding of the qualifications to be verified, and know how they are applied in business.

- demonstrate competent practice in external verification of assessment, and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process.

It is the responsibility of the awarding body to select and appoint EQAs.

3.3 Internal quality assurer (IQA)[4]

A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical

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[2] Also known as External Verifier (EV)

[3] The need for countersigning the decisions of EQAs working towards a qualification, applies to England and Wales and not Scotland.

[4] Also known as Internal Verifier (IV)

understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQA.s

IQAs must:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA[5] and should be supported by a qualified IQA throughout their training period.

- be "occupationally competent. IQAs must demonstrate sufficient and current understanding of the qualifications to be internally verified, and know how they are applied in business.

- demonstrate competent practice in internal verification of assessment, and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process.

Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Business Administration, Customer Service and Management and Leadership competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual CPD records that are maintained in assessment centres.

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[5] The need for countersigning the decisions of IQAs working towards a qualification, applies to England and Wales and not Scotland.

Evidence

4.1 Evidence from Workplace Performance

- Evidence of occupational competence of all competence units at any level, should be generated and collected through performance under workplace conditions. This includes the knowledge- based learning outcomes and assessment criteria of the competence units.

- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

4.2 Simulation

- Simulation can be applied to all units listed in Appendix B.

- Where simulation is used for units at Level 2 and above, it should only form a small part of the evidence for the qualification.

- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.

- Simulation must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in Appendix A.

4. Employer direct model

Skills CFA encourages the use of an employer direct model. The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process.

In order to use the employer direct model:

- **An organisation must:**
  - o have staff who have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification; **OR**

  - o seek guidance and approval from an awarding organisation to demonstrate that they have:

- appropriate processes in place to facilitate assessment, moderation or verification functions
- carried out 100% mapping of the trainer, supervisor or managers' assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.

  o agree the mapping process with the awarding organisation/body involved
  o demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification

- **An Awarding Organisation must:**

  o offer this model to employers only
  o supply information on the requirements for internal and external moderation/verification activities to assessment centres.

Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Business Administration, Customer Service and Management and Leadership competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual continual professional development (CPD) records that are maintained in assessment centres.

5. Appendix A – Realistic working environment guidelines

Realistic Working Environment (RWE) can be applied to all the units in Appendix B:

It is essential that organisations wishing to operate a RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE the following guidelines must be met:

1. the RWE is managed as a real work situation

2. assessment must be carried out under realistic business pressures

3. all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations

4. candidates must be expected to achieve a volume of work comparable to normal business practices

5. the range of services, products, tools, materials and equipment that the candidates use must be up to date and available

6. account must be taken of any legislation or regulations in relation to the type of work that is being carried out

7. candidates must be given workplace responsibilities to enable them to meet the requirements of the units

8. customer perceptions of the RWE is similar to that found in the work situation being represented

9. candidates must show that their productivity reflects those found in the work situation being represented.

6. Appendix B – Simulation: a list of units

Simulation can only be applied to the following competence units:

Business Administration

Skills CFA	Unit title	Level
B&A 3	Work with others in a business environment	1
B&A 4	Health and safety in a business environment	1
B&A 5	Manage time and workload	1
B&A 6	Use a telephone and voicemail system	1
B&A 7	Prepare text from notes	1
B&A 8	Meet and welcome visitors in a business	1
B&A 9	Handle mail	1
B&A 10	Use office	1

Customer Service

Skills CFA	Unit title	Level
CS	Communication in customer service	1
CS	Record details of customer service problems	1
CS	Deal with customer queries, requests and problems	1

Management and Leadership

Skills CFA	Unit title	Level
M&L 17	Manage conflict within a team	3
M&L 31	Discipline and grievance management	4
M&L 44	Manage redundancy and redeployment	4

Qualification structure

To achieve the IAO Level 2 Diploma in Team Leading, learners must achieve a minimum of 40 credits. Learners must achieve 22 credits from the mandatory units in group A, a minimum of 12 credits from Optional Group B and a maximum of 6 credits from the units in Optional Group C.

The total Guided Learning Hours (GLH) for this qualification is 201 hours.

The Total Qualification Time (TQT) for this qualification is 400 hours.

Unit Structures

All units are listed below

Mandatory unit

Unit ref	Unit title	Level	Credit value	GLH
L/506/1788	Manage personal performance and development	2	4	18
T/506/1798	Communicate work-related information	2	4	23
H/506/1800	Lead and manage a team	2	5	25
R/506/2294	Principles of team leading	2	5	37
R/506/2957	Understand business	2	4	32

Optional group B

Unit ref	Unit title	Level	Credit value	GLH
R/506/1789	Develop working relationships with colleagues	2	3	19
Y/506/2958	Contribute to meetings in a business environment	2	3	7
J/506/1806	Principles of equality and diversity in the workplace	2	2	10
T/506/1820	Promote equality, diversity and inclusion in the workplace	3	3	15
A/506/1821	Manage team performance	3	4	21
J/506/1921	Manage individuals' performance	3	4	20
Y/506/1924	Chair and lead meetings	3	3	10
J/506/2292	Encourage innovation	3	4	14
K/506/1927	Manage conflict within a team	3	5	25
M/506/1928	Procure products and/or services	3	5	35
M/506/1931	Collaborate with other departments	3	3	14
F/506/1934	Participate in a project	3	3	19

Optional group C

Unit ref	Unit title	Level	Credit value	GLH
T/505/4673	Health and Safety Procedures in the Workplace	2	2	16
R/506/1811	Store and retrieve information	2	4	19
D/506/1813	Handle mail	2	3	15
L/506/1905	Employee rights and responsibilities	2	2	16
A/506/2130	Deliver customer service	2	5	27
F/506/2131	Understand customers	2	2	17
A/506/2158	Resolve customer service problems	2	5	22
H/506/1912	Negotiate in a business environment	3	4	18
K/506/1913	Develop a presentation	3	3	11
M/506/1914	Deliver a presentation	3	3	17
R/506/2151	Resolve customers' complaints	3	4	22

Barred Units

Barred units	
This unit	**Is barred against this unit**
Contribute to meetings in a business environment (Y/506/2958)	Chair and lead meetings (Y/506/1924)
Principles of equality and diversity in the workplace (J/506/1806)	Promote equality, diversity and inclusion in the workplace (T/506/1820)

Title:	L/506/1788 Manage personal performance and development
Level:	2
Credit value:	4
GLH:	18

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to manage personal performance	1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2 Agree criteria for measuring progress and achievement with line manager 1.3 Complete tasks to agreed timescales and quality standards 1.4 Report problems beyond their own level of competence and authority to the appropriate person 1.5 Take action needed to resolve any problems with personal performance
2. Be able to manage their own time and workload	2.1 Plan and manage workloads and priorities using time management tools and techniques 2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives 2.3 Explain the benefits of achieving an acceptable "work-life balance"
3. Be able to identify their own development needs	3.1 Identify organisational policies relating to personal development 3.2 Explain the need to maintain a positive attitude to feedback on performance 3.3 Explain the potential business benefits of personal development 3.4 Identify their own preferred learning style(s) 3.5 Identify their own development needs from analysis of role, personal and team objectives

		3.6	Use feedback from others to identify their own development needs
		3.7	Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs
4. Be able to fulfil a personal development plan		4.1	Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms
		4.2	Make use of formal development opportunities that are consistent with business needs
		4.3	Use informal learning opportunities that contribute to the achievement of personal development objectives
		4.4	Review progress against agreed objectives, and amend plans accordingly
		4.5	Share lessons learned with others using agreed communication methods

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage personal performance and development. Upon completion of this unit, learners will be able to manage their own performance, time and workload. They will also be able to identify their own development needs and fulfil a personal development plan.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LAA1

Title:	T/506/1798 Communicate work-related information
Level:	2
Credit value:	4
GLH:	23
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand the principles and techniques of work-related communication	1.1 Describe communication techniques used to gain and maintain the attention and interest of an audience 1.2 Explain the principles of effective written business communications 1.3 Explain the principles of effective verbal communications in a business environment 1.4 Describe the importance of checking the accuracy and currency of information to be communicated 1.5 Describe the importance of explaining to others the level of confidence that can be placed on the information being communicated 1.6 Describe the advantages and disadvantages of different methods of communication for different purposes
2. Be able to communicate work-related information verbally	2.1 Identify the information to be communicated 2.2 Confirm that the audience is authorised to receive the information 2.3 Provide accurate information, using appropriate verbal communication techniques 2.4 Communicate in a way that the listener can understand, using language that is appropriate to the topic 2.5 Confirm that the listener has understood what has been communicated
3. Be able to communicate work-related information in writing	3.1 Identify the information to be communicated

	3.2	Provide accurate information using the appropriate written communication methods and house styles
	3.3	Adhere to any organisational confidentiality requirements when communicating in writing
	3.4	Use correct grammar, spelling, sentence structure and punctuation, using accepted business communication principles and formats
	3.5	Justify opinions and conclusions with evidence

| **Additional information about this unit** | |
| N/A | |

Unit aim (s)	This unit aims to develop the knowledge and skills required to communicate work-related information and introduces learners to the key principles and techniques of work-related communication. Upon completion of this unit, learners will be able to communicate work-related information both verbally and in writing.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LEC4

Title:	H/506/1800 Lead and manage a team
Level:	2
Credit value:	5
GLH:	25
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Be able to engage and support team members	1.1 Explain organisational policies, procedures, values and expectations to team members 1.2 Communicate work objectives, priorities and plans in line with operational requirements 1.3 Explain the benefits of encouraging suggestions for improvements to work practices 1.4 Provide practical support to team members facing difficulties 1.5 Explain the use of leadership techniques in different circumstances 1.6 Give recognition for achievements, in line with organisational policies 1.7 Explain different ways of motivating people to achieve business performance targets
2. Be able to manage team performance	2.1 Allocate responsibilities making best use of the expertise within the team 2.2 Agree with team member(s) specific, measurable objectives (SMART) in line with business needs 2.3 Provide individuals with resources to achieve the agreed objectives 2.4 Monitor individuals' progress, providing support and feedback to help them achieve their objectives 2.5 Explain techniques to monitor individuals' performance 2.6 Report on team performance in line with organisational requirements
3. Be able to deal with problems within a team	3.1 Assess actual and potential problems and their consequences

	3.2 Report problems beyond the limits of their own competence and authority to the right person 3.3 Take action within the limits of their own authority to resolve or reduce conflict 3.4 Adapt practices and processes as circumstances change
Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to lead and manage teams. Upon completion of this unit, learners will be able to engage and support team members, manage team performance and deal with problems arising within a team.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LBA3

Title:	R/506/2294 Principles of team leading
Level:	2
Credit value:	5
GLH:	37
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand leadership styles in organisations	1.1 Describe characteristics of effective leaders 1.2 Describe different leadership styles 1.3 Describe ways in which leaders can motivate their teams 1.4 Explain the benefits of effective leadership for organisations
2. Understand team dynamics	2.1 Explain the purpose of different types of teams 2.2 Describe the stages of team development and behaviour 2.3 Explain the concept of team role theory 2.4 Explain how the principle of team role theory is used in team building and leadership 2.5 Explain typical sources of conflict within a team and how they could be managed
3. Understand techniques used to manage the work of teams	3.1 Explain the factors to be taken into account when setting targets 3.2 Describe a range of techniques to monitor the flow of work of a team 3.3 Describe techniques to identify and solve problems within a team
4. Understand the impact of change management within a team	4.1 Describe typical reasons for organisational change 4.2 Explain the importance of accepting change positively 4.3 Explain the potential impact on a team of negative responses to change 4.4 Explain how to implement change within a team
5. Understand team motivation	5.1 Explain the meaning of the term "motivation"

	5.2 Explain factors that affect the level of motivation of team members 5.3 Describe techniques that be used to motivate team members 5.4 Explain how having motivated staff affects an organisation
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding required to lead a team. Upon completion of this unit, learners will have developed an understanding of key team leading principles, including leadership styles, team dynamics and team motivation. Learners will also develop an understanding of techniques used to manage the work of teams and the impact of change management within a team.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	CFAM&LBA3

Title:	R/506/2957 Understand business
Level:	2
Credit value:	4
GLH:	32
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand organisational structures	1.1 Explain the differences between the private sector, the public sector and the voluntary sector 1.2 Explain the features and responsibilities of different business structures 1.3 Explain the relationship between an organisation's vision, mission, strategy and objectives
2. Understand the business environment	2.1 Describe the internal and external influences on a business 2.2 Explain the structure and use of a strength, weakness, opportunity and threat (SWOT) analysis 2.3 Explain why change can be beneficial to business organisations 2.4 Explain organisations' health and safety responsibilities 2.5 Describe sustainable ways of working 2.6 Explain how legislation affects the management and confidentiality of information
3. Understand the principles of business planning and finance within an organisation	3.1 Explain the purpose, content and format of a business plan 3.2 Explain the business planning cycle 3.3 Explain the purpose of a budget 3.4 Explain the concept and importance of business risk management 3.5 Explain types of constraint that may affect a business plan 3.6 Define a range of financial terminology 3.7 Explain the purposes of a range of financial reports
4. Understand business reporting within an organisation	4.1 Explain methods of measuring business performance

	4.2 Explain the uses of management information and reports
	4.3 Explain how personal and team performance data is used to inform management reports
	4.4 Describe a manager's responsibility for reporting to internal stakeholders
5. Understand the principles of management responsibilities and accountabilities within an organisation	5.1 Explain the principle of accountability in an organisation
	5.2 Explain the difference between "authority" and "responsibility"
	5.3 Explain the meaning of delegated levels of authority and responsibility

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding regarding business and introduces learners to the key principles underpinning business. Upon completion of this unit, learners will have developed an understanding of the business environment and organisational structures. Learners will also develop an awareness of business planning and finance within an organisation, the management responsibilities and accountabilities within an organisation and business reporting within an organisation.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	CFAM&LBA7

Title:	R/506/1789 Develop working relationships with colleagues
Level:	2
Credit value:	3
GLH:	19

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the principles of effective team working	1.1 Outline the benefits of effective team working 1.2 Describe how to give feedback constructively 1.3 Explain conflict management techniques that may be used to resolve team conflicts 1.4 Explain the importance of giving team members the opportunity to discuss work progress and any issues arising 1.5 Explain the importance of warning colleagues of problems and changes that may affect them
2. Be able to maintain effective working relationships with colleagues	2.1 Recognise the contribution of colleagues to the achievement of team objectives 2.2 Treat colleagues with respect, fairness and courtesy 2.3 Fulfil agreements made with colleagues 2.4 Provide support and constructive feedback to colleagues
3. Be able to collaborate with colleagues to resolve problems	3.1 Take others' viewpoints into account when making decisions 3.2 Take ownership of problems within own level of authority 3.3 Take action to minimise disruption to business activities within their own level of authority 3.4 Resolve problems within their own level of authority and agreed contribution

Additional information about this unit

N/A

Unit aim (s)	This unit aims to develop the knowledge and skills required to develop working relationships with colleagues, and introduces learners to the key principles underpinning effective team working. Upon completion of this unit, learners will be able to maintain effective working relationships with colleagues and work collaboratively to resolve problems.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDD1

Title:	Y/506/2958 Contribute to meetings in a business environment
Level:	2
Credit value:	3
GLH:	7
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Be able to prepare for meetings	1.1 Explain the structure and purpose of different types of meetings in a business environment 1.2 Explain the importance of having a meeting agenda which addresses objectives 1.3 Obtain current versions of documents required for the meeting 1.4 Gather information from relevant people in preparation for meetings 1.5 Confirm the objectives to be achieved during the meeting
2. Be able to participate in meetings	2.1 Present views and information, providing evidence to support the case 2.2 Represent the views of those consulted 2.3 Take others' viewpoints into account in decision-making 2.4 Identify issues that may have an impact on their area of responsibility 2.5 Make constructive contributions in line with business objectives 2.6 Summarise future actions and accountabilities
3. Be able to carry out post-meeting activities	3.1 Carry out agreed actions post-meeting within the agreed timescale 3.2 Identify areas for improvements by reflecting on personal contributions to meetings

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to make contributions to meetings. Upon completion of this unit, learners will be able to prepare for and participate in meetings and will also be able to carry out post-meeting activities.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDD7

Title:	J/506/1806 Principles of equality and diversity in the workplace
Level:	2
Credit value:	2
GLH:	10

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the implications of equality legislation	1.1 Define the concept "equality and diversity" 1.2 Describe the legal requirements for equality of opportunity 1.3 Describe the role and powers of organisations responsible for equality 1.4 Explain the benefits of equal opportunities and diversity 1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation
2. Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1 Explain how organisational policies on equality and diversity translate into day to day activity in the workplace 2.2 Describe their own responsibilities for equality and diversity in the workplace 2.3 Describe behaviours that support equality, diversity and inclusion in the workplace

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding regarding equality and diversity, and will introduce learners to the key principles underpinning equality and diversity in the workplace. Upon completion of this unit, learners will understand the implications of equality legislation and will understand organisational standards and expectations for equality and diversity in the workplace.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	CFAM&LBA7

Title:	T/506/1820 Promote equality, diversity and inclusion in the workplace
Level:	3
Credit value:	3
GLH:	15
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. **Understand the organisational aspects of equality, diversity and inclusion in the workplace**	1.1 Explain the difference between equality, diversity and inclusion 1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy 1.3 Explain the potential consequences of breaches of equality legislation 1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion
2. **Understand the personal aspects of equality, diversity and inclusion in the workplace**	2.1 Explain the different forms of discrimination and harassment 2.2 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace 2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace
3. **Be able to support equality, diversity and inclusion in the workplace**	3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace 3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace 3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace
Additional information about this unit N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to promote equality, diversity and inclusion in the workplace. Upon completion of this unit, learners will have developed an understanding of both the organisational and personal aspects of equality, diversity and inclusion in the workplace. Learners will utilise this knowledge in supporting equality, diversity and inclusion in the workplace.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LBA7

Title:	A/506/1821 Manage team performance
Level:	3
Credit value:	4
GLH:	21

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the management of team performance	1.1 Explain the use of benchmarks in managing performance 1.2 Explain a range of quality management techniques to manage team performance 1.3 Describe constraints on the ability to amend priorities and plans
2. Be able to allocate and assure the quality of work	2.1 Identify the strengths, competences and expertise of team members 2.2 Allocate work on the basis of the strengths, competences and expertise of team members 2.3 Identify areas for improvement in team members' performance outputs and standards 2.4 Amend priorities and plans to take account of changing circumstances 2.5 Recommend changes to systems and processes to improve the quality of work
3. Be able to manage communications within a team	3.1 Explain to team members the lines of communication and authority levels 3.2 Communicate individual and team objectives, responsibilities and priorities 3.3 Use communication methods that are appropriate to the topics, audience and timescales 3.5 Provide support to team members when they need it 3.6 Agree with team members a process for providing feedback on work progress and any issues arising 3.7 Review the effectiveness of team communications and make improvements
Additional information about this unit	

N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage the performance of a team. Upon completion of this unit, learners will have developed an understanding of the management of team performance. Learners will be able to allocate and assure the quality of work and manage communications within a team.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDB2, CFAM&LDB3

Title:	J/506/1921 Manage individuals' performance
Level:	3
Credit value:	4
GLH:	20

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the management of underperformance in the workplace	1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance 1.2 Explain how to identify causes of underperformance 1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively 1.4 Explain how to address issues that hamper individuals' performance 1.5 Explain how to agree a course of action to address underperformance
2. Be able to manage individuals' performance in the workplace	2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives 2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs 2.3 Apply motivation techniques to maintain morale 2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards 2.5 Monitor individuals' progress towards objectives in accordance with agreed plans 2.6 Recognise individuals' achievement of targets and quality standards 2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace
Additional information about this unit	

N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage individuals' performance. Upon completion of this unit, learners will have developed an understanding of the management of underperformance in the workplace and will be able to manage individuals' performance in the workplace.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDB4, CFAM&LDC2, CFAM&LDC3, CFAM&LDC5

Title:	Y/506/1924 Chair and lead meetings
Level:	3
Credit value:	3
GLH:	10

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to prepare to lead meetings	1.1 Identify the type, purpose, objectives, and background to a meeting 1.2 Identify those individuals expected, and those required to attend a meeting 1.3 Prepare for any formal procedures that apply to a meeting 1.4 Describe ways of minimising likely problems in a meeting 1.5 Take action to ensure that meeting documentation is prepared correctly and distributed to the agreed people within the agreed timescale
2. Be able to chair and lead meetings	2.1 Follow business conventions in the conduct of a meeting 2.2 Facilitate meetings so that everyone is involved and the optimum possible consensus is achieved 2.3 Manage the agenda within the timescale of the meeting 2.4 Summarise the agreed actions, allocated responsibilities, timescales and any future arrangements
3. Be able to deal with post-meeting matters	3.1 Take action to ensure that accurate records of a meeting are produced and distributed in the agreed format and timescale 3.2 Take action to ensure that post-meeting actions are completed 3.3 Evaluate the effectiveness of a meeting and identify points for future improvement

Additional information about this unit

N/A

Unit aim (s)	This unit aims to develop the knowledge and skills required to chair and lead meetings. Upon completion of this unit, learners will be able to prepare to lead meetings, chair and lead meetings and deal with post-meeting matters.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDD6

Title:	J/506/2292 Encourage innovation
Level:	3
Credit value:	4
GLH:	14

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to identify opportunities for innovation	1.1 Analyse the advantages and disadvantages of techniques used to generate ideas 1.2 Explain how innovation benefits an organisation 1.3 Explain the constraints on their own ability to make changes 1.4 Agree with stakeholders terms of reference and criteria for evaluating potential innovation and improvement 1.5 Engage team members in finding opportunities to innovate and suggest improvements 1.6 Monitor performance, products and/or services and developments in areas that may benefit from innovation 1.7 Analyse valid information to identify opportunities for innovation and improvement
2. Be able to generate and test ideas for innovation and improvement	2.1 Generate ideas for innovation or improvement that meet agreed criteria 2.2 Test selected ideas that meet viability criteria 2.3 Evaluate the fitness for purpose and value of the selected ideas 2.4 Assess potential innovations and improvements against the agreed evaluation criteria
3. Be able to implement innovative ideas and improvements	3.1 Explain the risks of implementing innovative ideas and improvements 3.2 Justify conclusions of efficiency and value with evidence

	3.3 Prepare costings and schedules of work that will enable efficient implementation 3.4 Design processes that support efficient implementation
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to encourage innovation. Upon completion of this unit, learners will be able to identify opportunities for innovation and generate and test ideas for innovation and improvement. Learners will also be able to implement innovative ideas and improvements.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LCA1

Title:	K/506/1927 Manage conflict within a team
Level:	3
Credit value:	5
GLH:	25
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand the principles of conflict management	1.1 Evaluate the suitability of different methods of conflict management in different situations 1.2 Describe the personal skills needed to deal with conflict between other people 1.3 Analyse the potential consequences of unresolved conflict within a team 1.4 Explain the role of external arbitration and conciliation in conflict resolution
2. Be able to reduce the potential for conflict within a team	2.1 Communicate to team members their roles, responsibilities, objectives and expected standards of behaviour 2.2 Explain to team members the constraints under which other colleagues work 2.3 Review systems, processes, situations and structures that are likely to give rise to conflict in line with organisational procedures 2.4 Take action to minimise the potential for conflict within the limits of their own authority 2.5 Explain how team members' personalities and cultural backgrounds may give rise to conflict
3. Be able to deal with conflict within a team	3.1 Assess the seriousness of conflict and its potential impact 3.2 Treat everyone involved with impartiality and sensitivity 3.3 Decide a course of action that offers optimum benefits 3.4 Explain the importance of engaging team members' support for the agreed actions 3.5 Communicate the actions to be taken to those who may be affected by it

	3.6 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with conflict within a team
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to manage conflict within a team and introduces learners to the key principles of conflict management. Upon completion of this unit, learners will be able to reduce the potential for conflict within a team and will also be able to deal with conflict within a team.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDB8, CFAM&LDD5

Title:	M/506/1928 Procure products and/or services
Level:	3
Credit value:	5
GLH:	35

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to identify procurement requirements	1.1 Explain current and likely future procurement requirements 1.2 Decide whether the purchase of products and/or services offers the organisation best value 1.3 Evaluate ethical and sustainability considerations relating to procurement 1.4 Justify the decision to buy products and/or services with evidence of an analysis of risk, costs and benefits
2. Be able to select suppliers	2.1 Explain the factors to be taken into account in selecting suppliers 2.2 Explain organisational procurement policies, procedures and standards 2.3 Explain the effect of supplier choice on the supply chain 2.4 Use appropriate media to publicise procurement requirements 2.5 Confirm the capability and track record of suppliers and their products and/or services 2.6 Select suppliers that meet the procurement specification
3. Be able to buy products and/or services	3.1 Explain the action to be taken in the event of problems arising 3.2 Agree contract terms that are mutually acceptable within their own scope of authority 3.3 Record agreements made, stating the specification, contract terms and any post-contract requirements 3.4 Adhere to organisational policies and procedures, legal and ethical requirements

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to procure products and/or services. Upon completion of this unit, learners will be able to identify procurement requirements, select suppliers and buy products and/or services.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LED1, CFAM&LED2, CFAM&LED3

Title:	M/506/1931 Collaborate with other departments
Level:	3
Credit value:	3
GLH:	14
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand how to collaborate with other departments	1.1 Explain the need for collaborating with other departments 1.2 Explain the nature of the interaction between their own team and other departments 1.3 Explain the features of effective collaboration 1.4 Explain the potential implications of ineffective collaboration with other departments 1.5 Explain the factors relating to knowledge management that should be considered when collaborating with other departments
2. Be able to identify opportunities for collaboration with other departments	2.1 Analyse the advantages and disadvantages of collaborating with other departments 2.2 Identify with which departments collaborative relationships should be built 2.3 Identify the scope for and limitations of possible collaboration
3. Be able to collaborate with other departments	3.1 Agree Service Level Agreements (SLAs), objectives and priorities of collaborative arrangements 3.2 Work with other departments in a way that contributes to the achievement of organisational objectives

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to collaborate with other departments. Upon completion of this unit, learners will understand how to collaborate with other departments and be able to identify opportunities for collaboration and consequently collaborate with other departments.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDD3

Title:	F/506/1934 Participate in a project
Level:	3
Credit value:	3
GLH:	19

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to manage a project	1.1 Explain the features of a project business case 1.2 Explain the stages of a project lifecycle 1.3 Explain the roles of people involved in a project 1.4 Explain the uses of project-related information 1.5 Explain the advantages and limitations of different project monitoring techniques 1.6 Analyse the interrelationship of project scope, schedule, finance, risk, quality and resources
2. Be able to support the delivery of a project	2.1 Fulfil their role in accordance with a project plan 2.2 Collect project-related information in accordance with project plans 2.3 Use appropriate tools to analyse project information 2.4 Report on information analysis in the agreed format and timescale 2.5 Draw issues, anomalies and potential problems to the attention of project managers 2.6 Adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project

Additional information about this unit	
N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to participate in a project. Upon completion of this unit, learners will

	understand how to manage a project and will be able to support the delivery of a project.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All assessment criteria must be met and assessed in line with the Skills CfA Assessment Strategy
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDD3

Title:	T/505/4673 Health and safety procedures in the workplace
Level:	2
Credit value:	2
GLH:	16

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Know health and safety procedures in the workplace	1.1 Define the main responsibilities for health and safety in the workplace of the following: • employers • employees 1.2 Describe two health and safety laws affecting the workplace 1.3 Define the importance of following health and safety procedures in the workplace 1.4 Define the types of information or support available in relation to a specified aspect of health and safety in the workplace
2. Be able to carry out tasks with regard to health and safety in the workplace	2.1 Carry out a risk assessment of a specified workplace activity 2.2 Use equipment or tools safely in the workplace 2.3 Describe how to prevent accidents in the workplace 2.4 Assess how own health and safety practices could be improved

Additional information about this unit	
N/A	
Unit aim (s)	The aim of this unit is to provide learners with an understanding of health and safety procedures in the workplace and to use that understanding to carry out tasks with regard to health and safety in the workplace.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	R/506/1811 Store and retrieve information
Level:	**2**
Credit value:	**4**
GLH:	**19**

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand information storage and retrieval	1.1 Describe systems and procedures for storing and retrieving information 1.2 Outline legal and organisational requirements for information security and retention 1.3 Explain how to create filing systems to facilitate information identification and retrieval 1.4 Explain how to use different search techniques to locate and retrieve information 1.5 Describe what to do when problems arise when storing or retrieving information
2. Be able to gather and store information	2.1 Gather the information required within the agreed timescale 2.2 Store files and folders in accordance with organisational procedures 2.3 Store information in approved locations 2.4 Adhere to organisational policies and procedures, and legal and ethical requirements
3. Be able to retrieve information	3.1 Confirm information to be retrieved and its intended use 3.2 Retrieve the required information within the agreed timescale
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to store and retrieve information. Upon completion of this unit, learners will be able to gather, store and retrieve information.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Business & Administration (2013) National Occupational Standards:

	• CFABAD332 Store and retrieve information using a filing system
Details of the relationship of the unit and relevant national occupational standards	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	D/506/1813 Handle mail
Level:	2
Credit value:	3
GLH:	15
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand how to deal with mail	1.1 Explain how to deal with "junk" mail 1.2 Describe what to do in the event of problems arising when dealing with incoming or outgoing mail 1.3 Describe how to operate a franking machine 1.4 Explain how to prepare packages for distribution 1.5 State organisational policies and procedures on mail handling, security and the use of courier services 1.6 Explain the process for reporting suspicious or damaged items in accordance with organisational procedures
2. Be able to deal with incoming mail	2.1 Sort incoming mail in line with organisational procedures 2.2 Distribute incoming mail and packages to the right people according to the agreed schedule 2.3 Deal with incorrectly addressed and "junk" mail in accordance with organisational procedures
3. Be able to deal with outgoing mail	3.1 Organise the collection of outgoing mail and packages on time 3.2 Identify the best option for dispatching mail according to the required degree of urgency, size and value of the item 3.3 Dispatch outgoing mail on time
Additional information about this unit N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to handle mail. Upon completion of this unit, learners will be able to deal with both incoming and outgoing mail.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Business & Administration (2013) National Occupational Standards: • CFABAA612 Handle mail
Details of the relationship of the unit and relevant national occupational standards	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	L/506/1905 Employee rights and responsibilities
Level:	2
Credit value:	2
GLH:	16

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the role of organisations and industries	1.1 Explain the role of their own occupation within an organisation and industry 1.2 Describe career pathways within their organisation and industry 1.3 Identify sources of information and advice on an industry, occupation, training and career pathway 1.4 Describe an organisation's principles of conduct and codes of practice 1.5 Explain issues of public concern that affect an organisation and industry 1.6 Describe the types, roles and responsibilities of representative bodies and their relevance to their own role
2. Understand employers' expectations and employees' rights and obligations	2.1 Describe the employer and employee statutory rights and responsibilities that affect their own role 2.2 Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour 2.3 Describe the procedures and documentation that protect relationships with employees 2.4 Identify sources of information and advice on employment rights and responsibilities
Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge needed to understand their employee rights and responsibilities. Upon completion of this unit, learners will have developed an understanding of the role of organisations and

	industries, as well as gaining an understanding and awareness of employers' expectations and employees' rights and obligations.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	A/506/2130 Deliver customer service
Level:	2
Credit value:	5
GLH:	27

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand customer service delivery	1.1 Explain the relationship between customers' needs and expectations and customer satisfaction 1.2 Describe the features and benefits of an organisation's products and/or services 1.3 Explain the importance of treating customers as individuals 1.4 Explain the importance of balancing promises made to customers with the needs of an organisation 1.5 Explain when and to whom to escalate problems 1.6 Describe methods of measuring their effectiveness in the delivery of customer service
2. Understand the relationship between customer service and a brand	2.1 Explain the importance of a brand to an organisation 2.2 Explain how a brand affects an organisation's customer service offer 2.3 Explain the importance of using customer service language that supports a brand promise 2.4 Identify their own role in ensuring that a brand promise is delivered
3. Be able to prepare to deal with customers	3.1 Keep up to date with an organisation's products and/or services 3.2 Prepare resources that are necessary to deal with customers before starting work
4. Be able to provide customer service	4.1. Maintain organisational standards of presentation and behaviour when providing customer service 4.2. Adapt their own behaviour to meet customers' needs or expectations

	4.3. Respond to customers' requests in line with organisational guidelines
	4.4. Inform customers of the progress of requests
	4.5. Confirm that customers' expectations have been met in line with the service offer
	4.6. Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service
5. Be able to support improvements to customer service delivery	5.1 Identify ways that customer service could be improved for an organisation and individuals
	5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to deliver customer service. Upon completion of this unit, learners will be able to prepare to deal with customers, provide customer service, and support improvements to customer service delivery.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Customers Service (2013) National Occupational Standards: • CFACSA1 Maintain a positive and customer-friendly attitude • CFACSA2 Behave in a way that gives a good customer service impression • CFACSA4 Give customers a positive impression of yourself and your organisation • CFACSA7 Live up to the brand promise when delivering customer service • CFACSA8 Make customer service personal • CFACSB1 Do your job in a customer friendly way • CFACSB2 Deliver reliable customer service

	• CFACSF2 Deliver customer service within the rules

Title:	F/506/2131 Understand customers
Level:	2
Credit value:	2
GLH:	17
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand different types of customers	1.1 Explain the distinctions between internal and external customers 1.2 Explain how cultural factors can affect customers' expectations 1.3 Describe the characteristics of challenging customers 1.4 Explain how to identify dissatisfied customers
2. Understand the value of customers and their loyalty	2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty 2.2 Explain the relationship between customer satisfaction and organisational performance 2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services 2.4 Explain the potential consequences of customers' dissatisfaction 2.5 Describe different methods of attracting customers and retaining their loyalty
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the underpinning knowledge required to understand customers. Upon completion of this unit, learners will have developed an understanding of different types of customers and will also know the value of customers and their loyalty.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A

Details of the relationship of the unit and relevant national occupational standards	Customers Service (2013) National Occupational Standards

Title:	A/506/2158 Resolve customer service problems
Level:	2
Credit value:	5
GLH:	22
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand the resolution of customer service problems	1.1 Describe an organisation's customer service and complaints procedures 1.2 Describe techniques to identify customer service problems and their causes 1.3 Describe techniques to deal with situations where customers become agitated or angry 1.4 Explain the limits of their own authority for resolving customers' problems and making promises 1.5 Explain the purpose of encouraging customers to provide feedback 1.6 Describe methods used to encourage customers to provide feedback
2. Be able to resolve customer service problems	2.1 Identify the nature and cause of customer service problems 2.2 Identify workable options for resolving problems within organisational guidelines 2.3 Use the most appropriate method of communication for dealing with customers 2.4 Agree with customers the option that best meets their needs and those of the organisation 2.5 Keep customers informed of progress 2.6 Fulfil promises made to customers during the resolution process 2.7 Share customer feedback with others to improve the resolution of customer service problems 2.8 Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems

3. Be able to manage unresolved customer service problems	3.1 Explain to customers the reasons why problems cannot be resolved 3.2 Refer customers to other sources of help if their problems cannot be resolved
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to resolve customer service problems. Upon completion of this unit, learners will be able to resolve customer service problems and manage unresolved customer service problems.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Customers Service (2013) National Occupational Standards: • CFACSC3 Resolve customer service problems

Title:	H/506/1912 Negotiate in a business environment
Level:	3
Credit value:	4
GLH:	18
Learning outcomes **The learner will:**	**Assessment criteria** **The learner can:**
1. Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy 1.2 Explain the use of different negotiation techniques 1.3 Explain how research on the other party can be used in negotiations 1.4 Explain how cultural differences might affect negotiations
2. Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation 2.2 Explain the scope of their own authority for negotiating 2.3 Prepare a negotiating strategy 2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities 2.5 Assess the likely objectives and negotiation stances of the other party 2.6 Research the strengths and weaknesses of the other party
3. Be able to carry out business negotiations	3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities 3.2 Adapt the conduct of the negotiation in accordance with changing circumstances 3.3 Maintain accurate records of negotiations, outcomes and agreements made 3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations

Additional information about this unit	
N/A	
Unit aim (s)	N/A
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: • CFABAG124 Negotiate in a business environment

Title:	K/506/1913 Develop a presentation
Level:	**3**
Credit value:	**3**
GLH:	**11**

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to develop a presentation	1.1 Explain best practice in developing presentations 1.2 Explain who needs to be consulted on the development of a presentation 1.3 Explain the factors to be taken into account in developing a presentation 1.4 Analyse the advantages and limitations of different communication media
2. Be able to develop a presentation	2.1 Identify the purpose, content, style, timing and audience for a presentation 2.2 Select a communication media that is appropriate to the nature of a presentation, message and audience 2.3 Tailor a presentation to fit the timescale and audience's needs 2.4 Prepare a presentation that is logically structured, summarises the content and addresses the brief 2.5 Take action to ensure that a presentation adheres to organisational guidelines and policies 2.6 Develop materials that support the content of a presentation

Additional information about this unit
N/A

Unit aim (s)	This unit aims to develop the knowledge and skills required to develop a presentation. Upon completion of this unit, learners will understand best practice in developing presentations and will be able to develop a structured presentation.

Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: • CFABAA617 Develop a presentation

Title:	M/506/1914 Deliver a presentation
Level:	3
Credit value:	3
GLH:	17

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the principles underpinning the delivery of presentations	1.1 Analyse the advantages and limitations of different methods of, and media for, making presentations 1.2 Explain how the type and size of the audience affects the delivery of a presentation 1.3 Explain the factors to be taken into account in developing contingency plans when delivering presentations 1.4 Explain voice projection and timing techniques when delivering presentations 1.5 Explain the factors to be taken into account in responding to questions from an audience 1.6 Explain different methods for evaluating the effectiveness of a presentation
2. Be able to prepare to deliver a presentation	2.1 Confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation 2.2 Develop contingency plans for potential equipment and resource failure 2.3 Take action to ensure that the presentation fits the time slot available

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

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to deliver a presentation. Upon completion of this unit, learners will be able to prepare for and deliver a presentation.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: • CFABAA623 Deliver a presentation

Title:	R/506/2151 Resolve customers' complaints
Level:	3
Credit value:	4
GLH:	22

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the monitoring and resolution of customers' complaints	1.1 Assess the suitability of a range of monitoring techniques for customers' complaints 1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery 1.3 Explain negotiating techniques used to resolve customers' complaints 1.4 Explain conflict management techniques used in dealing with upset customers 1.5 Explain organisational procedures for dealing with customer complaints 1.6 Explain when to escalate customers' complaints 1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint 1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services
2. Be able to deal with customers' complaints	2.1 Confirm the nature, cause and implications of customers' complaints 2.2 Take personal responsibility for dealing with complaints 2.3 Communicate in a way that recognises customers' problems and understands their points of view 2.4 Explain the advantages and limitations of different complaint response options to customers 2.5 Explain the advantages and limitations of different complaint response options to the organisation 2.6 Keep customers informed of progress

	2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority 2.8 Record the outcome of the handling of complaints for future reference 2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints
Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to resolve customers' complaints. Upon completion of this unit, learners will be able to deal with customers' complaints.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Customers Service (2013) National Occupational Standards: • CFACSC7 Process customer service complaints • CFACSC8 Handle referred customer complaints