



## **Level 2 Diploma in Team Leading**

### **Qualification Specification**

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## Introduction

The Level 2 Diploma in Team Leading qualification aims to give an introduction to the roles and functions of a team leader and explores issues such as accountability, authority limitations, motivating teams and planning and monitoring their work.

The awarding body for this qualification is ProQual Awarding Body and the regulatory body is the Office of Qualifications and Examinations Regulation (Ofqual). The specification for this qualification has been approved by the Welsh Government for use by centres in Wales and by the Council for the Curriculum Examinations and Assessment (CCEA) for use by centres in Northern Ireland.

The qualification has been accredited onto the Regulated Qualification Framework (RQF) and provides a progression route to higher level or discipline related qualifications.

## Qualification Profile Level 2 Diploma in Team Leading

Qualification title	<b>ProQual Level 2 Diploma in Team Leading</b>
Ofqual qualification number	601/3581/5
Level	2
Total qualification timed	400 hours
Guided learning hours	201
Assessment	Pass or fail Internally assessed and verified by centre staff External quality assurance by ProQual verifiers
Qualification start date	1/9/2014
Qualification end date	

## Entry Requirements

There are no formal entry requirements for this qualification.

Centres should carry out an **initial assessment** of candidate skills and knowledge to identify any gaps and help plan the assessment.

## Barred Units

Source Unit	Target Unit
Principles of equality and diversity in the workplace (J/506/1806)	Promote equality, diversity and inclusion in the workplace (T/506/1820)
Contribute to meetings in a business environment (Y/506/2958)	Chair and lead meetings (Y/506/1924)

## Qualification Structure

Candidates must achieve a minimum of **40 credits**:

- **22 credits** from the **Mandatory units in Group A**, plus
- a minimum of **12 credits** from **Optional Group B**
- a maximum of **6 credits** may be from **Optional Group C**

<b>Group A Mandatory Units – complete all units</b>			
<b>Unit Reference Number</b>	<b>Unit Title</b>	<b>Unit Level</b>	<b>Credit Value</b>
L/506/1788	Manage personal performance and development	2	4
T/506/1798	Communicate work-related information	2	4
H/506/1800	Lead and manage a team	2	5
R/506/2294	Principles of team leading	2	5
R/506/2957	Understand business	2	4
<b>Group B Optional Units – a minimum of 12 credits</b>			
<b>Unit Reference Number</b>	<b>Unit Title</b>	<b>Unit Level</b>	<b>Credit Value</b>
R/506/1789	Develop working relationships with colleagues	2	3
J/506/1806	Principles of equality and diversity in the workplace	2	2
T/506/1820	Promote equality, diversity and inclusion in the workplace	3	3
A/506/1821	Manage team performance	3	4
J/506/1921	Manage individuals' performance	3	4
Y/506/1924	Chair and lead meetings	3	3
K/506/1927	Manage conflict within a team	3	5
M/506/1928	Procure products and/or services	3	5
M/506/1931	Collaborate with other departments	3	3
F/506/1934	Participate in a project	3	3
J/506/2292	Encourage innovation	3	4
Y/506/2958	Contribute to meetings in a business environment	2	3
<b>Group C Optional Units – a maximum of 6 credits</b>			
<b>Unit Reference Number</b>	<b>Unit Title</b>	<b>Unit Level</b>	<b>Credit Value</b>
T/505/4673	Health and Safety Procedures in the Workplace	2	2
R/506/1811	Store and retrieve information	2	4
D/506/1813	Handle mail	2	3
L/506/1905	Employee rights and responsibilities	2	2
A/506/2130	Deliver customer service	2	5
F/506/2131	Understand customers	2	2
A/506/2158	Resolve customer service problems	2	5
H/506/1912	Negotiate in a business environment	3	4
K/506/1913	Develop a presentation	3	3
M/506/1914	Deliver a presentation	3	3
R/506/2151	Resolve customers' complaints	3	4

## Centre Requirements

Centres must be approved to offer this qualification. If your centre is not approved please complete and submit form **ProQual Additional Qualification Approval Application**.

### Staff

Staff delivering this qualification must be appropriately qualified and/or occupationally competent.

### Assessors/Internal Quality Assurance

For each competence-based unit centres must be able to provide at least one assessor and one internal quality assurance verifier who are suitably qualified for the specific occupational area. Assessors and internal quality assurance verifiers for competence-based units or qualifications will normally need to hold appropriate assessor or verifier qualifications, such as:

- Award in Assessing Competence in the Work Environment
- Award in Assessing Vocationally Related Achievement
- Certificate in Assessing Vocational Achievement
- Award in the Internal Quality Assurance of Assessment Processes and Practices
- Certificate in Leading the Internal Quality Assurance of Assessment Processes and Practices

## Support for Candidates

Materials produced by centres to support candidates should:

- enable them to track their achievements as they progress through the learning outcomes and assessment criteria;
- provide information on where ProQual's policies and procedures can be viewed;
- provide a means of enabling Internal and External Quality Assurance staff to authenticate evidence

## Assessment

This suite of qualifications are competence-based, candidates must demonstrate the level of competence described in the units. Assessment is the process of measuring a candidate's skill, knowledge and understanding against the standards set in the qualification.

The qualifications must be assessed by an appropriately experienced and qualified assessor.

Each candidate is required to produce a portfolio of evidence which demonstrates their achievement of all of the learning outcomes and assessment criteria for each unit.

- Evidence can include:
- observation report by assessor
  - assignments/projects/reports
  - professional discussion
  - witness testimony
  - candidate product
  - worksheets
  - record of oral and written questioning
  - Recognition of Prior Learning

**Learning outcomes** set out what a candidate is expected to know, understand or be able to do.

**Assessment criteria** specify the standard a candidate must meet to show the learning outcome has been achieved.

*Learning outcomes and assessment criteria can be found from page 9 in this document.*

## Internal Quality Assurance

An internal quality assurance verifier confirms that assessment decisions made in centres are made by competent and qualified assessors, that they are the result of sound and fair assessment practice and that they are recorded accurately and appropriately.

## Adjustments to Assessment

Adjustments to standard assessment arrangements are made on the individual needs of candidates. ProQual's Reasonable Adjustments Policy and Special Consideration Policy sets out the steps to follow when implementing reasonable adjustments and special considerations and the service that ProQual provides for some of these arrangements.

Centres should contact ProQual for further information or queries about the contents of the policy.

## Results Enquiries and Appeals

All enquiries relating to assessment or other decisions should be dealt with by centres, with reference to ProQual's Enquiries and Appeals Procedures.

## Certification

Candidates who achieve the required credits for qualifications will be awarded:

- A certificate listing all units achieved with their related credit value, and
- A certificate giving the full qualification title -

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#### **Claiming certificates**

Centres may claim certificates for candidates who have been registered with ProQual and who have successfully achieved the required number of credits for a qualification. All certificates will be issued to the centre for successful candidates.

#### **Unit certificates**

If a candidate does not achieve all of the units/credits required for a qualification, the centre may claim a unit certificate for the candidate which will list all of the units/credits achieved.

#### **Replacement certificates**

If a replacement certificate is required a request must be made to ProQual in writing. Replacement certificates are labelled as such and are only provided when the claim has been authenticated. Refer to the Fee Schedule for details of charges for replacement certificates.

## Learning Outcomes and Assessment Criteria

### Unit L/506/1788

### Manage personal performance and development

Learning Outcome - The learner will:	Assessment Criterion - 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 analyses of the 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

## Unit T/506/1798

### Communicate work-related information

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit H/506/1800

### Lead and manage a team

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit R/506/2294

### Principles of team leading

Learning Outcome - The learner will:	Assessment Criterion - 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 can be used to motivate team members 5.4 Explain how having motivated staff affects an organisation

## Unit R/506/2957

### Understand business

Learning Outcome - The learner will:	Assessment Criterion - 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

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
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

**Unit R/506/1789**  
**Develop working relationships with colleagues**

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit J/506/1806

### Principles of equality and diversity in the workplace

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the implications of equality legislation	<ul style="list-style-type: none"><li>1.1 Define the concept 'equality and diversity'</li><li>1.2 Describe the legal requirements for equality of opportunity</li><li>1.3 Describe the role and powers of organisations responsible for equality</li><li>1.4 Explain the benefits of equal opportunities and diversity</li><li>1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation</li></ul>
2 Understand organisational standards and expectations for equality and diversity and context in the workplace	<ul style="list-style-type: none"><li>2.1 Explain how organisational policies on equality and diversity translate into day to day activity in the workplace</li><li>2.2 Describe their own responsibilities for equality and diversity in the workplace</li><li>2.3 Describe behaviours that support equality, diversity and inclusion in the workplace</li></ul>

## Unit T/506/1820

### Promote equality, diversity and inclusion in the workplace

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand the organisational aspects of equality, diversity and inclusion in the workplace	<ul style="list-style-type: none"><li>1.1 Explain the difference between equality, diversity and inclusion</li><li>1.2 Explain the impact of equality, diversity and inclusion across aspects of organisational policy</li><li>1.3 Explain the potential consequences of breaches of equality legislation</li><li>1.4 Describe nominated responsibilities within an organisation for equality, diversity and inclusion</li></ul>
2 Understand the personal aspects of equality, diversity and inclusion in the workplace	<ul style="list-style-type: none"><li>2.1 Explain the different forms of discrimination and harassment</li><li>2.2 Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace</li><li>2.3 Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace</li></ul>
3 Be able to support equality, diversity and inclusion in the workplace	<ul style="list-style-type: none"><li>3.1 Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace</li><li>3.2 Identify potential issues relating to equality, diversity and inclusion in the workplace</li><li>3.3 Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace</li></ul>

## Unit A/506/1821

### Manage team performance

Learning Outcome - The learner will:	Assessment Criterion - 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 3.4 Provide support to team members when they need it 3.5 Agree with team members a process for providing feedback on work progress and any issues arising 3.6 Review the effectiveness of team communications and make improvements

## Unit J/506/1921

### Manage individuals' performance

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit Y/506/1924

### Chair and lead meetings

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit K/506/1927

### Manage conflict within a team

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit M/506/1928

### Procure products and/or services

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit M/506/1931

### Collaborate with other departments

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit F/506/1934

### Participate in a project

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit J/506/2292

### Encourage innovation

Learning Outcome - The learner will:	Assessment Criterion - 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 the agreed criteria 2.2 Test selected ideas that meet viability criteria 2.3 Evaluate the fitness for purpose and value of the selected ideas 2.4 Assess potential innovations and improvements against the agreed evaluation criteria
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

## Unit Y/506/2958

### Contribute to meetings in a business environment

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Be able to prepare for meetings	<ul style="list-style-type: none"><li>1.1 Explain the structure and purpose of different types of meetings in a business environment</li><li>1.2 Explain the importance of having a meeting agenda which addresses objectives</li><li>1.3 Obtain current versions of documents required for the meeting</li><li>1.4 Gather information from relevant people in preparation for meetings</li><li>1.5 Confirm the objectives to be achieved during the meeting</li></ul>
2 Be able to participate in meetings	<ul style="list-style-type: none"><li>2.1 Present views and information, providing evidence to support the case</li><li>2.2 Represent the views of those consulted</li><li>2.3 Take others' viewpoints into account in decision-making</li><li>2.4 Identify issues that may have an impact on their area of responsibility</li><li>2.5 Make constructive contributions in line with business objectives</li><li>2.6 Summarise future actions and accountabilities</li></ul>
3 Be able to carry out post-meeting activities	<ul style="list-style-type: none"><li>3.1 Carry out agreed actions post-meeting within the agreed timescale</li><li>3.2 Identify areas for improvements by reflecting on personal contributions to meetings</li></ul>

## Unit T/505/4673

### Health and Safety Procedures in the Workplace

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Know health and safety procedures in the workplace.	<ul style="list-style-type: none"><li>1.1 Define the main responsibilities for health and safety in the workplace of the following:<ul style="list-style-type: none"><li>a) employers</li><li>b) employees</li></ul></li><li>1.2 Describe two health and safety laws affecting the workplace.</li><li>1.3 Define the importance of following health and safety procedures in the workplace.</li><li>1.4 Define the types of information or support available in relation to a specified aspect of health and safety in the workplace.</li></ul>
2 Be able to carry out tasks with regard to health and safety in the workplace.	<ul style="list-style-type: none"><li>2.1 Carry out a risk assessment of a specified workplace activity.</li><li>2.2 Use equipment or tools safely in the workplace.</li><li>2.3 Describe how to prevent accidents in the workplace.</li><li>2.4 Assess how own health and safety practices could be improved.</li></ul>

## Unit R/506/1811

### Store and retrieve information

Learning Outcome - The learner will:	Assessment Criterion - 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, 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

## Unit D/506/1813

### Handle mail

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand how to deal with mail	<ul style="list-style-type: none"><li>1.1 Explain how to deal with “junk” mail</li><li>1.2 Describe what to do in the event of problems arising when dealing with incoming or outgoing mail</li><li>1.3 Describe how to operate a franking machine</li><li>1.4 Explain how to prepare packages for distribution</li><li>1.5 State organisational policies and procedures on mail handling, security and the use of courier services</li><li>1.6 Explain the process for reporting suspicious or damaged items in accordance with organisational procedures</li></ul>
2 Be able to deal with incoming mail	<ul style="list-style-type: none"><li>2.1 Sort incoming mail in line with organisational procedures</li><li>2.2 Distribute incoming mail and packages to the right people according to the agreed schedule</li><li>2.3 Deal with incorrectly addressed and “junk” mail in accordance with organisational procedures</li></ul>
3 Be able to deal with outgoing mail	<ul style="list-style-type: none"><li>3.1 Organise the collection of outgoing mail and packages on time</li><li>3.2 Identify the best option for dispatching mail according to the required degree of urgency, size and value of the item</li><li>3.3 Dispatch outgoing mail on time</li></ul>

## Unit L/506/1905

### Employee rights and responsibilities

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit A/506/2130

### Deliver customer service

Learning Outcome - The learner will:	Assessment Criterion - 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 own 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 their 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

## Unit F/506/2131

### Understand customers

Learning Outcome - The learner will:	Assessment Criterion - The learner can:
1 Understand different types of customers	<ul style="list-style-type: none"><li>1.1 Explain the distinctions between internal and external customers</li><li>1.2 Explain how cultural factors can affect customers' expectations</li><li>1.3 Describe the characteristics of challenging customers</li><li>1.4 Explain how to identify dissatisfied customers</li></ul>
2 Understand the value of customers and their loyalty	<ul style="list-style-type: none"><li>2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty</li><li>2.2 Explain the relationship between customer satisfaction and organisational performance</li><li>2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services</li><li>2.4 Explain the potential consequences of customers' dissatisfaction</li><li>2.5 Describe different methods of attracting customers and retaining their loyalty</li></ul>

## Unit A/506/2158

### Resolve customer service problems

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit H/506/1912

### Negotiate in a business environment

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit K/506/1913

### Develop a presentation

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit M/506/1914

### Deliver a presentation

Learning Outcome - The learner will:	Assessment Criterion - 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

## Unit R/506/2151

### Resolve customers' complaints

Learning Outcome - The learner will:	Assessment Criterion - 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



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