

**ATHE qualification specification for:**

**ATHE Level 3 Diploma in Business (60 credits)**

610/1761/9

**ATHE Level 3 90-credit Diploma in Business**

610/1763/2

**ATHE Level 3 Diploma in Business and  
Management (120 credits)**

610/1764/4

**ATHE Level 3 Extended Diploma in Business and  
Management (180 credits)**

610/1765/6

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## Introduction

### About ATHE

Awards for Training and Higher Education (ATHE) is a global awarding organisation regulated by Ofqual and other United Kingdom and international regulators. We provide centres with a wide variety of qualifications including, but not limited to, business and management, administrative management, law, computing, health and social care and religious studies.

For the full list please visit our website: [www.athe.co.uk](http://www.athe.co.uk)

ATHE has also developed a range of bespoke qualifications for clients.

**The ATHE mission** is to provide outstanding qualifications, customer service and support, enabling centres to thrive and their learners to achieve and progress. We will support this mission by:

- providing qualifications which enable learners to fulfil their potential and make a positive contribution to society both socially and economically
- delivering the highest standards of customer service
- delivering support and guidance which meet the needs of all centres and enable them to improve performance
- upholding and maintaining the quality and standards of qualifications and assessments
- having a commitment to lifelong learning and development

### Our Qualifications

Our qualifications have been created with the involvement of expert input from managers and staff in colleges, industry professionals and our qualification development team. We have also taken into account feedback from learners and consulted with higher education institutions to ensure the qualifications facilitate progression to higher levels. We offer a suite of awards, certificates and diplomas across many RQF levels.

Key features of the qualifications include:

- regular reviews of the units and the associated support materials so they are current and meet the needs of learners
- alignment of the programmes of learning to degree and higher degree qualifications in HEIs in the UK and international institutions so there is comparability and smooth progression for learners
- core units that are common to different sectors offering the opportunity for learners to move between sectors or delay decisions on particular specialisms
- optional units offering the opportunity for learners to choose specialist units which best match their job, interests and progression aspirations.
- small qualifications that can be used for professional development for those in employment or for learners who do not have the time to undertake a full-time programme
- challenging and relevant learning with flexible methods of assessment allowing tutors to select the most appropriate methods for their learners
- opportunities for learners to achieve higher grades by unit and overall qualification and reach their maximum potential

- learning that develops knowledge, understanding and skills e.g. problem solving, interpersonal skills needed by effective managers.

## Support for Centres

We are committed to supporting our centres and offer a range of training, support and consultancy services including:

- a comprehensive guide for centres on delivering ATHE qualifications
- qualification guidance, assessor guidance, suggested resources and sample assignments for all units which have been written and verified by experienced practitioners
- verification and guidance with internally devised assignments
- guidance on how to deliver, assess and quality assure the qualifications
- an ATHE centre support officer who guides centres through the recognition process, learner registration and learner results submission
- health check visits to highlight areas of good practice and any areas for development
- an allocated member of our team who can work with centres to support further improvements in the quality of teaching, learning and assessment
- the services of a team of experienced external quality assurers
- opportunities for training and staff development
- access to free webinars to support delivery, assessment and QA processes
- support for business development.

## ATHE Qualifications at Level 3 in this Specification

This document provides key information on the following ATHE Level 3 Business qualifications:

- ATHE Level 3 Diploma in Business
- ATHE Level 3 90-credit Diploma in Business
- ATHE Level 3 Diploma in Business and Management
- ATHE Level 3 Extended Diploma in Business and Management

including the rules of combination, the content of all the units and guidance on assessment and curriculum planning. It should be used in conjunction with the ATHE handbook “Delivering ATHE Qualifications”. Further guidance and supporting documentation on curriculum planning, internal verification and assessment is provided separately in the Delivering ATHE Qualifications Guide and via the ATHE website.

These qualifications are regulated by Ofqual and are listed on Ofqual’s Register of Regulated Qualifications. Each qualification has a Qualification Number (QN). This number will appear on the learner’s final certification documentation. Each unit within a qualification also has a Unit Reference Number.

The QN numbers for these qualifications are as follows:

ATHE Level 3 Diploma in Business	610/1761/9
ATHE Level 3 90-credit Diploma in Business	610/1763/2
ATHE Level 3 Diploma in Business and Management	610/1764/4
ATHE Level 3 Extended Diploma in Business and Management	610/1765/6

## Regulation Dates

These qualifications are regulated from December 2022 and their operational start dates in centres are 3<sup>rd</sup> May 2023.

## Availability

These qualifications are available to learners who are registered at a recognised ATHE centre which is based in England, Wales or internationally, outside of the United Kingdom.

## ATHE's Level 3 Qualifications in Business

These qualifications have been developed to conform to the requirements of the Ofqual Regulated Qualifications Framework (RQF), to meet the requirements of higher education and employers and to meet the needs of learners.

This suite of Level 3 Business Diplomas is designed to enable learners to sample, progress and deepen their knowledge and understanding of Business and Management at Level 3. A common set of units underpins each qualification outcome meaning that learners can study both flexibly and progressively, accumulating unit achievements towards a range of qualification outcomes. Learners can study as much or as little as they choose and be focussed on a relevant qualification achievement aim.

The qualifications focus on the application of knowledge and skills development, being relevant for not only those learners looking to develop academic understanding of business as a subject but also for those looking for preparation for workplace roles. The qualifications are suitable for learners to study both in college/classroom settings and as distance-learning programmes.

Each unit is supported by an ATHE assignment which, based on an interconnecting set of business scenarios, requires the learner to complete a small number of focussed tasks designed to demonstrate relevant business knowledge and skill.

The qualification suite has been designed to maximise and facilitate learner engagement:

- The majority of Level 3 mandatory units for the 60-credit Diploma qualification are 10 credits in size enabling learners new to the subject to develop initial subject interest in shorter, bite-size chunks.
- Learners studying for the Level 3 60-credit Diploma are also supported by ATHE workbooks which, closely following ATHE assignment tasks, offer the learner straightforward and confidence-building templates for unit completion.
- The Level 3 60-credit Diploma has a synoptic final unit (Unit 5 Market Research) which enables learners to bring together knowledge and understanding from previous units to complete their assessment.
- Unit 13 Project Management is also potentially synoptic in structure and a possible way for learners taking a larger qualification to consolidate and further apply aspects of their learning.
- Level 3 optional units are 15 credits in size enabling learners interested in business to build on their initial progress in the 60-credit Diploma to further develop their understanding in a larger qualification.
- Each unit has signposting to synoptic learning and assessment opportunities across the entire suite of units, ensuring that learning and assessment is connected and holistic.
- Each unit is also signposted to Study Skills and Employability Skills opportunities derived from ATHE's standards. Again, this ensures that learners and tutors have the opportunity to relate aspects of learning to broader study and work-related skills.

More details on each specific qualification can be found below.

## **Introduction to the ATHE Level 3 Diploma in Business**

### **Aims of the Qualification**

The Level 3 Diploma in Business (60-credits) is designed to provide opportunities for learners to have initial gateway access to the key themes, issues and skills that underpin most business roles and activity. The qualification aims to give learners new to business a broad, current and integrated introduction to the subject. The qualification has 5 mandatory units and a synoptic structure with learners utilising learning in units 1 – 4 in a project-based Unit 5.

This qualification comprises a part of ATHE's International Access Programme (IAP) and is designed to be taken alongside other 60-credit IAP subjects to give learners a balanced range of different Level 3 subject options.

## **Introduction to the ATHE Level 3 90-credit Diploma in Business**

### **Aims of the Qualification**

The Level 3 90-credit Diploma in Business offers those learners who wish to study business more broadly the option to add 2 additional units to the 5 units studied for the initial Level 3 Diploma in Business. Choosing at least 1 mandatory unit from Introduction to Financial Controls in Business or Leading and Managing People, learners are also free to identify an optional unit of their own choice.

In this way, the Level 3 90-credit Diploma offers learners further core business learning plus the opportunity to begin to form specialist interests in other business areas. It is ideal for those learners both interested in further business but who may also be undertaking other/related studies and wish to combine their learning.

## **Introduction to the ATHE Level 3 Diploma in Business and Management**

### **Aims of the Qualification**

The Level 3 Diploma in Business and Management (120-credit) is designed to offer learners a much broader and more comprehensive experience of business. With both mandatory Introduction to Financial Controls in Business and Leading and Managing People units building on the core of units from the Level 3 Diploma in Business, the Level 3 Diploma in Business and Management requires learners to study basic leadership and management principles, which can then be developed further through the study of 2 additional optional units.

For learners looking to build towards higher education study in business management or careers in management, this qualification offers the opportunity to both understand the interrelationship between core business activities and leading/managing, and to explore that relationship in other business areas.

# Introduction to the ATHE Level 3 Extended Diploma in Business and Management

## Aims of the Qualification

The Level 3 Extended Diploma in Business and Management (180-credit) requires learners to complete all 13 units and provides for a complete Level 3 introduction to Business and Management. The Level 3 Extended Diploma is the broadest possible experience for those learners who require the fullest range of exposure to business themes, issues and skills. For those learners interested in fully realising their own academic interest and potential for the subject, this qualification offers the opportunity to engage with the widest possible number of business/management-related topics.

## Entry Requirements

These qualifications are designed for learners who are typically aged 16+.

ATHE's policy regarding access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all those wishing to access the qualifications

Centres should review the prior qualifications and experience of each learner and consider whether they provide the necessary foundations to undertake the programme of study at Level 3. If there are exceptional entrants, centres are advised to contact ATHE. For learners with disabilities and other specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification.

For learners who have recently been in education or training the entry profile is likely to include one of following:

- 5 or more GCSEs at grades 4 and above
- 5 or more GCSEs at grades C and above
- Other related level 2 subjects
- Equivalent international qualifications

Learners must also have an appropriate standard of English to enable them to access relevant resources and complete the unit assignments.

For those whom English is not their first language we recommend the following standards of proficiency in English language skills or an approved equivalent for these qualifications:

- IELTS 5.5
- Common European Framework of Reference (CEFR) B2
- Cambridge English Advanced (CAE) 162 or above
- Pearson Test of English (PTE) Academic 42-49

Mature learners may present a more varied profile of achievement that is likely to include relevant work experience (paid and/or unpaid) with levels of responsibility, participation and/or achievement of relevant professional qualifications. This may be used for recognition of prior learning (RPL). Learners may also hold RQF qualifications which will enable them to claim an exemption from part of the qualification.

Centres are required to recruit learners to qualifications with integrity. Centres must carry out robust initial assessment to ensure that learners, who undertake qualifications, have the necessary background knowledge, understanding and skills to undertake the learning and assessment at Level 3. This assessment should take account of any support available to the learner within the centre during the programme of study and any support that may be required to allow the learner to access the assessment for the units within the qualification.

ATHE will review centre recruitment policies as part of their monitoring processes.

### **Reasonable Adjustments and Special Considerations**

ATHE's policy on reasonable adjustments and special consideration aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the Equality Act 2010) without compromising the assessment of skills, knowledge and understanding. Where the learner has been awarded a Reasonable Adjustment or Special Consideration this must be recorded on the assessment sheet and the learner record. External Quality Assurers will take account of this information at the external quality assurance of learner work. Further details on Reasonable Adjustments and Special Considerations are provided in the policy document, which can be found on our website. Please contact ATHE if you are uncertain about adjustments for certain learners.

### **Progression**

On successful completion of these qualifications, learners will have a number of progression options.

Depending on the size of qualification taken and any other qualifications taken in a programme of study, learners may progress to:

- Further Level 3 study (in Level 3 Business or another subject)
- Study in Higher Education, eg Undergraduate degree (in Business or another subject)
- Higher level Business-related apprenticeships/Role-based technical qualifications
- Business-related employment/internships/self-employment

### **ATHE Recognition of Prior Learning (RPL)**

There will be occasions where learners wish to claim recognition of prior learning that has not been formally assessed and accredited. ATHE has provided detailed guidance on RPL which is available for centres on the ATHE website. Centres may also contact ATHE directly to obtain further clarification or discuss the requirements for RPL.

### **Resources Required by Centres**

ATHE expects centres to provide the right human and physical resources needed to ensure the quality of the learner experience. Centres must ensure that staff have the appropriate level of subject knowledge and are normally qualified to at least a degree standard. It is desirable that staff have a teaching and/or assessing qualification and practical experience of this sector.

The physical resources required will vary depending on the style of delivery. Where distance or blended learning is used, ATHE expects centres to have appropriate learning support materials, infrastructure and technology in place to meet student needs.

This information will be checked by external quality assurers on their visits to centres.

## Modes of Delivery

Subject to checks by external quality assurers' centres can deliver these qualifications using the following modes of delivery in order to meet the needs of their learners.

This can include:

- full time
- part-time
- blended learning
- distance learning

## Qualification size

The size of a qualification is expressed in **Total Qualification Time (TQT)**.

### Total Qualification Time – TQT

TQT is the total amount of time, in hours, expected to be spent by a student to achieve a qualification .

**TQT is comprised of:**

1. **Guided Learning Hours (GLH)**
2. **Additional non-supervised learning**

### Guided Learning Hours – GLH

This is the amount of time the average student is expected to spend in lectures and other tutor-supervised learning and activities, including induction, face to face training, e-learning with the co-presence of learner and tutor, invigilated exams.

Guided Learning Hours (GLH) are an estimate of the amount of time, on average, that a lecturer, supervisor, tutor or other appropriate provider of education or training, **will immediately guide or supervise** the learner to complete the learning outcomes of a unit to the appropriate standard. GLH are intended to provide guidance for centres on the amount of time required to deliver the programme and support learners.

### Additional non-supervised learning

This is an estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but, unlike Guided Learning, not under the Immediate Guidance or Supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

These activities may include webinars, podcasts, research, work-based learning, private and online study, compilation of a portfolio of evidence and non-invigilated assessment.

### How TQT is calculated

Values for Total Qualification Time, Guided Learning Hours and Credit, are calculated by considering the different activities that a learner would typically complete in order to achieve the learning outcomes of a qualification at the standards provided.

The needs of individual learners and the differing teaching styles used mean there will be variation in the actual time taken to complete a qualification.

Values for Total Qualification Time, Guided Learning Hours and Credit are estimates.

## Credit

Each ATHE qualification has a Credit value. Credit is calculated by dividing the TQT by ten. For example, a qualification with TQT of 120 hrs would have a credit value of 12.

## Level

The level is an indication of relative demand, complexity and depth of achievement and autonomy. These qualifications have been designed to suit learners working towards Level 3 qualifications. Level descriptors are divided into two categories:

- I. Knowledge and understanding
- II. Skills

There is a knowledge descriptor and a skills descriptor for each Level within the framework. The descriptors set out the generic knowledge and skills associated with the typical holder of a qualification at that Level. The knowledge and skills for Level 3 are:

### Knowledge descriptor (the holder....)

Has knowledge and understanding of facts, procedures and ideas in an area of study or field of work to complete well-defined tasks and address straightforward problems.  
Can interpret relevant information and ideas.  
Is aware of a range of information that is relevant to the area of study or work.

### Skills descriptor (the holder can....)

Select and use relevant cognitive and practical skills to complete well-defined, generally routine tasks and address straightforward problems.  
Identify, gather and use relevant information to inform actions.  
Identify how effective actions have been

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## Rules of Combination

Each qualification has agreed rules of combination which indicates the number of credits to be achieved, the units that are mandatory and the choice of optional units. The rules of combination for these qualifications are given below.

## Qualification Structure

### ATHE Level 3 Diploma in Business

ATHE Level 3 Diploma in Business is a 60-credit qualification.

### Rules of combination

Learners must achieve all units.

**The Total Qualification Time is 600 hours**

**The Total Guided Learning Hours is 360 hours**

**The Total Credit value is 60**

Unit Code	Unit Title	Level	Credit	GLH
F/650/4815	Unit 1 Business Environment	3	10	60
H/650/4816	Unit 2 How Businesses and Organisations Work	3	10	65

J/650/4817	Unit 3 Business Communication	3	10	55
L/650/4819	Unit 4 Working in Teams	3	10	60
T/650/4820	Unit 5 Market Research	3	20	120

### ATHE Level 3 90-credit Diploma in Business

ATHE Level 3 Diploma in Business is a 90-credit qualification.

#### Rules of combination

Learners must achieve:

- Units 1 – 5

Plus

- 2 other units (either both units 6 and 7, or at least 1 unit from units 6 and 7 plus 1 other optional unit)

**The Total Qualification Time is 900 hours**

**The Total Guided Learning Hours is 450 hours**

**The Total Credit value is 90**

Unit Code	Unit Title	Level	Credit	GLH
<b>Mandatory Units</b>				
F/650/4815	Unit 1 Business Environment	3	10	60
H/650/4816	Unit 2 How Businesses and Organisations Work	3	10	65
J/650/4817	Unit 3 Business Communication	3	10	55
L/650/4819	Unit 4 Working in Teams	3	10	60
T/650/4820	Unit 5 Market Research	3	20	120
<b>Plus either:</b>				
- <b><u>both</u> units 6 and 7, <u>or</u></b>				
- <b>at least 1 unit from units 6 and 7 plus 1 other optional unit</b>				
A/650/4822	Unit 6 Introduction to Financial Controls in Business	3	15	90
D/650/4823	Unit 7 Leading and Managing People	3	15	90
<b>Optional Units</b>				
F/650/4824	Unit 8 Principles of Marketing and Sales	3	15	90
H/650/4825	Unit 9 Human Resources	3	15	90
J/650/4826	Unit 10 Organisational Strategy	3	15	90
K/650/4827	Unit 11 Online Marketing	3	15	90
L/650/4828	Unit 12 International Business	3	15	90
M/650/4829	Unit 13 Project Management	3	15	90

## ATHE Level 3 Diploma in Business and Management

ATHE Level 3 Diploma in Business is a 120-credit qualification.

### Rules of combination

Learners must achieve:

- Units 1 – 7

Plus

- 2 other optional units

**The Total Qualification Time is 1200 hours**

**The Total Guided Learning Hours is 720 hours**

**The Total Credit value is 120**

Unit Code	Unit Title	Level	Credit	GLH
<b>Mandatory Units</b>				
F/650/4815	Unit 1 Business Environment	3	10	60
H/650/4816	Unit 2 How Businesses and Organisations Work	3	10	65
J/650/4817	Unit 3 Business Communication	3	10	55
L/650/4819	Unit 4 Working in Teams	3	10	60
T/650/4820	Unit 5 Market Research	3	20	120
A/650/4822	Unit 6 Introduction to Financial Controls in Business	3	15	90
D/650/4823	Unit 7 Leading and Managing People	3	15	90
<b>Optional Units</b>				
F/650/4824	Unit 8 Principles of Marketing and Sales	3	15	90
H/650/4825	Unit 9 Human Resources	3	15	90
J/650/4826	Unit 10 Organisational Strategy	3	15	90
K/650/4827	Unit 11 Online Marketing	3	15	90
L/650/4828	Unit 12 International Business	3	15	90
M/650/4829	Unit 13 Project Management	3	15	90

## ATHE Level 3 Extended Diploma in Business and Management

ATHE Level 3 Diploma in Business is a 180-credit qualification.

### Rules of combination

Learners must achieve all units.

**The Total Qualification Time is 1800 hours**

**The Total Guided Learning Hours is 1080 hours**

**The Total Credit value is 180**

Unit Code	Unit Title	Level	Credit	GLH
<b>Mandatory Units</b>				
F/650/4815	Unit 1 Business Environment	3	10	60
H/650/4816	Unit 2 How Businesses and Organisations Work	3	10	65
J/650/4817	Unit 3 Business Communication	3	10	55
L/650/4819	Unit 4 Working in Teams	3	10	60
T/650/4820	Unit 5 Market Research	3	20	120
A/650/4822	Unit 6 Introduction to Financial Controls in Business	3	15	90
D/650/4823	Unit 7 Leading and Managing People	3	15	90
F/650/4824	Unit 8 Principles of Marketing and Sales	3	15	90
H/650/4825	Unit 9 Human Resources	3	15	90
J/650/4826	Unit 10 Organisational Strategy	3	15	90
K/650/4827	Unit 11 Online Marketing	3	15	90
L/650/4828	Unit 12 International Business	3	15	90
M/650/4829	Unit 13 Project Management	3	15	90

Note: learners must complete on the qualification for which they are registered. Prior to certification, learners can amend the qualification for which they are registered, and centres should contact ATHE to discuss how to do this. Post-certification, learners wishing to be registered for another, larger qualification outcome must pay the relevant registration fee for this qualification outcome.

## Guidance on Assessment and Grading

### Assessment

Assessment for each unit is completed based on achievement of the Learning Outcome at the standards set by the Assessment Criteria for that unit. The learner can therefore achieve a Pass, Merit, Distinction or Fail for each unit based on the quality of the work submitted and the assessor's judgements made against the criteria provided.

The assessment of each of the Level 3 qualifications in Business is completed through the submission of internally assessed learner work.

To achieve a pass for a unit, a learner must have successfully achieved the learning outcomes at the pass standard set by the assessment criteria for that unit. To achieve merit or distinction, the learner must demonstrate that they have achieved the criteria set for these grades. Learners cannot omit completing work to meet the pass standard and simply work to the higher grades, as this would put a pass for the unit in jeopardy. Similarly, learners cannot complete work to meet the criteria for distinction in the anticipation that this will also meet the criteria for merit. However, where work for the pass standard is marginal, assessors can take into account any extension work completed as this may support achievement of the pass standard.

ATHE will provide an assignment for each unit which can be used as the assessment for the unit. These assignments have extension activities, which enable the learners to provide additional evidence to show that the criteria for the higher grades have been met. The assessor therefore must judge the grade for the work submitted on the basis of whether the LO has been met at the standard, specified for the pass, merit or distinction grade for that LO. In making their judgements assessors will continue to check whether the command verbs stated in the AC have been delivered. There is no requirement for learners to produce the additional work required for the higher grades and the tutor may advise the learner to work to the pass standard, where this is appropriate.

The assessor should record their judgements on the ATHE template, stating what grade the learner has achieved and providing evidence for the judgements. The internal verifier can also use the ATHE IV template but the feedback to the assessor must show whether the assessor has made valid judgements for all the learner work, including any extension activities which met the standard for merit and distinction grades. Assessment is therefore more complex. Assessment judgements always require care to ensure that they are reliable and that there is sufficient and specific feedback to the learner to show whether he or she has demonstrated achievement of the LO at the specified standard. The additional grades mean that assessors must take even greater care to assure the validity of their judgements.

We would encourage our centres to develop their own assessment strategies, so you can put assignments in a context that is appropriate for your learners. Any assignments that you devise independently will need to be submitted to ATHE for approval before delivery of the programme. Centres can submit assignments for approval using the 'Centre-Devised Assignment' template documentation available on the ATHE centre portal.

An assignment can relate to a single unit, or an integrated assignment can incorporate more than one unit. Any assignment must show which learning outcomes and assessment criteria from which unit(s) are being covered.

### **Assignment Marking Guidance**

Each ATHE assignment has marking guidance produced with it so that assessors can better understand the requirements for the satisfaction of assessment criteria/learning outcomes. For tutors, it is worthwhile reading and understanding this marking guidance before learners are asked to commence an assignment. It is also worthwhile tutors bringing this marking guidance to the attention of learners before they embark on an assignment. As the marking guidance often captures the expected level of detail of a learner response, it contains additional information that can help learners and tutors better understand the kind of response to a task that best meets the requirements.

Key command verbs from the assessment criteria have also been emboldened in the marking guidance so that tutors and learners can clearly understand the level of response that is expected.

### **Recording Assessment Judgements**

Assessors are required to record assessment judgements for each student by unit. ATHE has provided a template for centres to use to record their judgements and this form should be used. The form enables the centre to record any adjustments due to special considerations or reasonable adjustments. Any adjustments following appeals should also be recorded. These records must be retained as they will be checked at external quality assurance visits. All learner work must be retained for a minimum of 4 years after certification has taken place.

### **Putting an Assessment Strategy in Place**

You will need to demonstrate to your External Quality Assurer that you have a clear assessment strategy supported by robust quality assurance to meet the ATHE requirements for registering learners for a qualification. In devising your assessment strategy, you will need to ensure that:

- Learners are well-briefed on the requirements of the unit and what they must do to meet them.
- Assessors are well-trained and familiar with the content of the unit/s they are assessing.

- There is an internal verification process in place to ensure consistency and standardisation of assessment across the qualification.
- Assessment decisions are clearly explained and justified through the provision of feedback to the learner.  
Work submitted can be authenticated as the learner's own work and that there is clear guidance and implementation of the centres Malpractice Policy.
- There is an assessment plan in place identifying dates for summative assessment of each unit and indicating when external quality assurance will be needed.
- Enough time is included in the assessment planning to allow the learners time for any necessary remedial work that may be needed prior to certification.

## Grading

### Grading system

The grading algorithms and overall grade thresholds published in any ATHE specification may be subject to change where this is necessary to maintain standards.

Given that these qualifications involve assessment using judgements against 'Pass', 'Merit' and 'Distinction' Assessment Criteria to make a decision about whether a learner has met the required standard, our grading system is straightforward, and we do not currently envisage the need to change this. However, should a change become necessary, the change would be published in an updated version of the specification with a clearly revised version number and a new 'valid from' date on the front cover. We will write to all centres in good time to inform them of this change so that plans for any changes can be made to your programme delivery, internal assessment, and quality assurance arrangements.

The ATHE grading system where a qualification result can be Pass, Merit, Distinction or Fail is as currently follows and we plan to maintain this system for the foreseeable future:

- Learner meets all Learning Outcomes at Pass standards stated in the assessment criteria in a unit > Learner gains a Pass for the unit
- Learner meets all Learning Outcomes at Pass standards, and where available also at Merit standards stated in the assessment criteria in a unit > Learner gains a Merit for the unit
- Learner meets all Learning Outcomes at Pass standards, and where available also at Merit and Distinction standards stated in the assessment criteria in a unit > Learner gains a Distinction for the unit
- Learner does not meet all Learning Outcomes at Pass standards stated in the assessment criteria in a unit > Learner gains a Fail for the unit
- Learner meets the rules of combination in a qualification and points for achieving units are added up > points are converted to an overall qualification grade > learner meets minimum number of points required > learner achieves a Pass, Merit or Distinction for the qualification
- Learner does not meet the rules of combination in a qualification and/or points for achieving units are added up > points are converted to an overall qualification grade > learner does not meet rules of combination or minimum number of points required > learner achieves a Fail for the qualification but may receive unit certification for those units achieving a Pass.

### Qualification Grading Structure

Each unit is graded pass, merit, or distinction. As well as receiving a grade for each individual unit learners will receive an overall grade for the qualification. The formula for establishing the overall grade is as follows.

**Points for each 10-credit unit allocated are:**

Pass (achieves Learning Outcomes at the standards stated in pass assessment criteria) – **30 points**

Merit (achieves Learning Outcomes at the standards stated in pass and all merit assessment criteria)

– **36 points**

Distinction (achieves Learning Outcomes at the standards stated in pass, all merit and all distinction

Assessment Criteria) – **45 points**

**Points for each 15-credit unit allocated are:**

Pass (achieves Learning Outcomes at the standards stated in pass assessment criteria) – **45 points**

Merit (achieves Learning Outcomes at the standards stated in pass and all merit assessment criteria)

– **54 points**

Distinction (achieves Learning Outcomes at the standards stated in pass, all merit and all distinction

Assessment Criteria) – **67.5**

**Points for each 20-credit unit allocated are:**

Pass (achieves Learning Outcomes at the standards stated in pass assessment criteria) – **60 points**

Merit (achieves Learning Outcomes at the standards stated in pass and all merit assessment criteria)

– **72 points**

Distinction (achieves Learning Outcomes at the standards stated in pass, all merit and all distinction

Assessment Criteria) – **90 points**

Total points required for each qualification grade:

**ATHE Level 3 Diploma in Business (60 credits)**

Pass 180 - 215

Merit 216 - 269

Distinction 270+

**ATHE Level 3 90-credit Diploma in Business and Management (90 credits)**

Pass 270 - 323

Merit 324 - 404

Distinction 405+

**ATHE Level 3 Diploma in Business and Management (120 credits)**

Pass 360 - 431

Merit 432 - 539

Distinction 540+

**ATHE Level 3 Extended Diploma in Business and Management (180 credits)**

Pass 540 - 647

Merit 648 - 809

Distinction 810+

**Example 1**

Example grading for ATHE Level 3 Diploma in Business and Management

Ayesha has achieved a total of points for the qualification:

Unit Title	Unit result	Unit points
Unit 1 Business Environment	Pass	30

Unit 2 How Businesses and Organisations Work	Merit	36
Unit 3 Business Communication	Pass	30
Unit 4 Working in Teams	Merit	36
Unit 5 Market Research	Merit	72
Unit 6 Introduction to Financial Controls in Business	Pass	45
Unit 7 Leading and Managing People	Pass	45
Unit 8 Principles of Marketing and Sales	Pass	45
Unit 9 Human Resources	Pass	45
<b>Total</b>		<b>384</b>

Ayesha has achieved 384 points and will be awarded a Pass grade for the qualification as the requirement for a Pass is 360 – 431 points.

## Example 2

Example grading for ATHE Level 3 Diploma in Business

Imran has achieved a total of 219 points for the qualification:

Unit Title	Unit result	Unit points
Unit 1 Business Environment	Distinction	45
Unit 2 How Businesses and Organisations Work	Merit	36
Unit 3 Business Communication	Pass	30
Unit 4 Working in Teams	Merit	36
Unit 5 Market Research	Merit	72
<b>Total</b>		<b>219</b>

Imran has achieved 219 points and will be awarded an overall Merit grade for the qualification as the requirement for a Merit is 216 - 269 points.

## Quality Assurance of Centres

Centres delivering ATHE qualifications must be committed to ensuring the quality of teaching and learning so that the learner experience is assured. Quality assurance will include a range of processes as determined by the centre and this could include, gathering learner feedback, lesson observation, analysis of qualitative and quantitative data etc. There must also be effective standardisation of assessors and verification of assessor decisions. ATHE will rigorously monitor the application of quality assurance processes in centres.

ATHE's quality assurance processes will include:

- Centre approval for those centres which are not already recognised to deliver ATHE RQF qualifications
- Monitoring visits to ensure the centre continues to work to the required standards
- External quality assurance of learner work

Centres will be required to undertake training, internal verification and standardisation activities as agreed with ATHE. Details of ATHE's quality assurance processes are provided in the ATHE Guide: "Delivering ATHE Qualifications" which is available on our website.

## Malpractice

Centres must have a robust Malpractice Policy in place, with a clear procedure for implementation. Centres must ensure that any work submitted for quality assurance can be authenticated as the learner's own. Any instance of plagiarism detected by the External Quality Assurer during sampling, will be investigated and could lead to sanctions against the centre.

Centres should refer to the Delivering ATHE Qualifications Guide and the ATHE Malpractice and Maladministration Policy on the ATHE website.

## Guidance for Teaching and Learning

Learners learn best when they are actively involved in the learning process. We would encourage practitioners delivering our qualifications to use a range of teaching methods and classroom-based activities to help them get information across and keep learners engaged in the topics they are studying. Learners should be encouraged to take responsibility for their learning and need to be able to demonstrate a high degree of independence in applying the skills of research and evaluation. You can facilitate this by using engaging methods of delivery that involve active learning rather than relying on traditional methods of lecture delivery to impart knowledge.

Your approach to delivery should give the learners enough structure and information on which to build without you doing the work for them. In achieving the right balance, you will need to produce well-planned sessions that follow a logical sequence and build on the knowledge, understanding and skills already gained.

## Top Tips for Delivery

- Adopt a range of teaching and learning methods, including active learning.
- Plan sessions well to ensure a logical sequence of skills development.
- Include study skills aspects, e.g., how to construct a report or Harvard Referencing. Build time into your Scheme of Work and Session Plans to integrate study skills teaching.
- Set structured additional reading and homework tasks to be discussed in class.
- Elicit feedback from your students. Get them to identify where the work they have done meets the assessment criteria.
- Contextualise your activities, e.g., using real case studies as a theme through the sessions.
- Use learner experience from the workplace or other personal learning
- Take an integrated approach to teaching topics across units, where appropriate, rather than always taking a unit-by-unit approach. In this way, learners will be able to see the links between the content of the different units.

## Unit Specifications – key features

### General Qualification Resources

This comprises a list of relevant and current textual/online sources of information that will underpin learning for the whole qualification as opposed to individual units. Unlike the suggested resources for each unit, this list is not only focussed on knowledge development, but also skills development, in particular, spoken and written English Skills.

### Unit Format

Each unit in ATHE's suite of qualifications is presented in a standard format. This format provides guidance on the requirements of the unit for learners, tutors, assessors, and external quality assurers.

Each unit has the following sections:

### Unit Title

The unit title reflects the content of the unit. The title of each unit completed will appear on a learner's statement of results.

### Unit Aims

The unit aims section summarises the content of the unit.

### Unit Code

Each unit is assigned an RQF unit code that appears with the unit title on the Register of Regulated Qualifications.

### RQF Level

All units and qualifications in the RQF have a level assigned to them which represents the level of achievement. The level of each unit is informed by the RQF level descriptors. The RQF level descriptors are available on the ATHE website.

### Credit Value

The credit value is the number of credits that may be awarded to a learner for the successful achievement of the learning outcomes of a unit.

### Guided Learning Hours (GLH)

Guided learning hours are an estimate of the amount of time, on average, that a tutor, trainer, workshop facilitator etc., will work with a learner, to enable the learner to complete the learning outcomes of a unit to the appropriate standard.

### Learning Outcomes

The learning outcomes set out what a learner is expected to know, understand or be able to do as the result of the learning process.

### Assessment Criteria

The assessment criteria describe the requirements a learner is expected to meet to demonstrate that the learning outcome has been achieved. Command verbs reflect the level of the qualification e.g., at Level 5 you would see words such as analyse and evaluate

### Unit Indicative Content

The unit indicative content section provides details of the range of subject material for the programme of learning for the unit. Learners should ensure that they use this content when preparing their responses to assignment tasks.

### Suggested Resources

This comprises a list of relevant and current textual/online sources of information that will underpin learning for the unit. It is not an exhaustive list and learners/tutors might find other resources that equally serve their purposes.

### Opportunities for Synoptic Teaching and Learning

This section identifies the links between the unit's learning outcomes and other unit learning outcomes and assessment criteria within the qualification that are thematically related. This enables learners and tutors the opportunity to connect learning across the qualification to ensure that learners have a joined-up experience of each unit.

### Opportunities for Synoptic Assessment

This section identifies the way in which a unit's assessment links internally different parts of a unit or links more broadly to other parts of the overall qualification. In each unit, there are shared Merit and Distinction AC which draw together different but related learning from different LOs. These are labelled throughout each unit:

Eg, Unit 1  
**LO3 + LO4**

3D1 Evaluate the impact of technology on the organisation and individuals

For certain units, eg Unit 5 Market Research, these represent larger opportunities for assessment to be informed by knowledge and understanding developed in previous units.

### Opportunities for Skills Development

This section contains two important elements of signposting: signposting to ATHE Study Skills and signposting to ATHE Employability Skills. These enable learners and tutors the opportunity to see where each unit's LO/AC link into underpinning Study Skills and Employability Skills categories, eg Digital Skills, Thinking Skills etc, and to promote possible programme/curriculum opportunities for the development of these skills. The ATHE Study Skills and Employability Skills are drawn from the standards documents for each skill. These standards documents are on the ATHE Centre Portal.

## General Qualification Resources

### Textbooks

- Richards C., Dransfield R., Goymer J and Bevan J (2010) BTEC Level 3 National Business Student Book 1 (Pearson)
- Richards C., Dransfield R (2010) BTEC Level 3 National Business Student Book 2 (Pearson)
- Marcouse I., Watson N., Hammond A., (2015) AQA Business for A Level, 3<sup>rd</sup> Edition (Hodder Education Publication)

### Internet Resources

<https://www.businessballs.com>

Harvard Business Review [www.hbr.org](http://www.hbr.org)

Forbes [www.forbes.com](http://www.forbes.com)

[www.ted.com/talks](http://www.ted.com/talks)

### Skills

- Bailey, S. Academic Writing: A Handbook for International Students, Abingdon: Routledge (latest edition)
- Campbell, C. and Smith, J. English for Academic Study: Listening, Reading: Garnet Education (latest edition)
- De Janasz, S., Wood, G., Gottschalk, L., Dowd, K., Schneider, B., (2006) Interpersonal Skills in Organisations, McGraw-Hill Education
- McCormack, J. and Watkins, S. English for Academic Study: Speaking, Reading: Garnet Education (latest edition)
- Peck J and Coyle M, (2012) The Student's Guide to Writing: Spelling, Punctuation and Grammar (Palgrave Study Skills)
- Stott, R., Young, T. and Bryan, C. Speaking your Mind: Oral Presentation and Seminar Skills, Harlow: Pearson (latest edition)
- Williams, E. J. Presentations in English, Oxford: Macmillan (latest edition)
- Zemach, D. and Rumisek, L. Academic Writing: From Paragraph to Essay. Oxford: Macmillan (latest edition)

### Online Resources

[www.ucl.ac.uk/internet-grammar](http://www.ucl.ac.uk/internet-grammar) - good grammar reference

[www.writingenglish.com/sitemap.htm](http://www.writingenglish.com/sitemap.htm)

[www.bbc.co.uk/worldservice/learningenglish/](http://www.bbc.co.uk/worldservice/learningenglish/)

[www.phrasebank.manchester.ac.uk](http://www.phrasebank.manchester.ac.uk)

[www.dartmouth.edu/~acskills/success/notes.html](http://www.dartmouth.edu/~acskills/success/notes.html)

[www.uefap.com](http://www.uefap.com)

## Unit Specifications

<b>Unit 1 Business Environment</b>			
<b>Unit aims</b>	In this unit learners will gain knowledge and understanding of the environment in which organisations operate. This will support understanding of the different and often complex contexts in which organisations function.		
<b>Unit level</b>	3		
<b>Unit code</b>	F/650/4815		
<b>GLH</b>	60		
<b>Credit value</b>	10		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with tutors appropriate organisations and countries on which to base their study. Tutors need to ensure that the organisations chosen are suitable. SMEs are recommended as larger organisations are often too complex and accessing the information required can be challenging. At least two internal and two external stakeholder groups should be included for LO1.</p> <p>Explanations should be illustrated with real world examples. Learner work should demonstrate substantial coverage of the unit indicative content. Learners should use the ATHE template Workbook to complete their responses.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the range of stakeholders who have an interest and influence on a business	1.1 Identify stakeholders for a named profit-making organisation and explain their <ol style="list-style-type: none"> <li>interests</li> <li>objectives and</li> <li>potential conflicts</li> </ol> 1.2 Explain the <ol style="list-style-type: none"> <li>interests and</li> <li>objectives of stakeholders in a named organisation operating in the not-for-profit sector</li> </ol>		

2. Understand the sectors of an economy	2.1 Describe economic sectors and the output generated from each sector 2.2 Analyse the size and importance of these sectors in a named country	2M1 Analyse recent changes seen in economic sectors in a named country	
3. Can conduct a STEEPLE analysis and understand the impact of external factors on organisations	3.1 Conduct a STEEPLE analysis to show how the external environment impacts a named organisation		<b>LO3 + LO4</b>  4D1 Evaluate the impact of technology on the organisation and individuals
4. Understand the changing nature and pattern of employment	4.1 Explain how the nature of work and employment have changed globally in recent years	4M1 Analyse the implications of changes to working patterns for organisations and individuals	

## Indicative Content

### LO1 Understand the range of people who have an interest and influence on a business

- Internal stakeholders e.g.; shareholders, employees, trade unions.
- External stakeholders e.g.; customers, suppliers, competitors, the local community
- The interests of stakeholders, e.g. costs, profit, social impact, job security, health and safety, employee engagement (an investor would be interested in the financial health of the organisation, for example)
- The objectives of each stakeholder group, e.g. an investor may set an objective to achieve a 5% return on investment
- Ways in which stakeholders' differing objectives may conflict

### LO2 Understand the sectors of an economy

- Sectors of the economy, including: primary, secondary, tertiary and quaternary
- Different ways in which the size of each sector is measured, value of output and employment
- Importance of each sector to future growth of the economy
- Changes and trends within sectors, e.g. greater reliance on technology such as artificial intelligence in manufacturing
- Changes and trends between sectors, e.g. The decline in manufacturing in the UK, greater reliance on the service sector for employment opportunities

### LO3 Conduct a STEEPLE analysis

- STEEPLE analysis of factors beyond the control of a business
- Social, e.g. changes to social attitudes
- Technological, e.g. new developments and methods, new products

- Economic, e.g. the business cycle and level of demand, unemployment and inflation
- Ethical, e.g. changing attitudes towards ethical and moral issues
- Political, e.g. impact of government policies
- Legal, e.g. changes to legislation that impact business and consumers
- Environmental, e.g. sustainability
- Four stages of the Business Cycle

**LO4 Understand the changing nature and pattern of employment**

- Changing nature of work, e.g. balance of employment opportunities in the different sectors, the impact of technology on work- remote working, hybrid working, globalisation of businesses.
- Changes to working patterns e.g. male and female participation rates, full and part time working, employment contracts such as permanent, temporary, agency working, self-employed, flexible working, the gig economy
- Global variation in employment patterns

<b>Suggested Resources</b>	
<b>Business Environment</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"> <li>• Hamilton, L., (2018) The International Business Environment, Oxford University Press</li> <li>• Johnson C.E., (2021) Organizational Ethics, Sage Publications Inc.</li> <li>• Keohane, N. O., (2016) Markets and the Environment, Springer</li> <li>• Morrison, J., (2020) The Global Business Environment: Towards Sustainability? Bloomsbury Publishing</li> <li>• Wetherly, P., (2018) The Business Environment: Themes and Issues in a Globalizing World, Oxford University Press</li> </ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"> <li>• <a href="https://www.tutor2u.net/business">https://www.tutor2u.net/business</a>.</li> <li>• <a href="http://www.bbc/bitesize/business.com">www.bbc/bitesize/business.com</a>.</li> </ul>

<b>Unit 1 Business Environment - Supporting information</b>	
<b>Opportunities for Synoptic Teaching and Learning</b>	
Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.	
<b>Learning Outcome</b>	<b>Teaching and learning links to other unit LO/AC</b>
LO1 Understand the range of stakeholders who have an interest and influence on a business	Unit 2 How Businesses and Organisations Work LO2 Understand the importance of customers and customer service for organisations. All AC.  Unit 3 Business Communication LO1 Understand the principles of effective internal and external communication. AC 1.1 Explain channels of communication used a) internally and b) externally in organisations. LO3 Understand how organisations communicate with customers. All AC.
LO3 Conduct a STEEPLE analysis and understand the impact of external factors on organisations	Unit 2 How Businesses and Organisations Work LO1 Understand the objectives of organisations AC 1.2 Explain factors influencing choice of objectives in both profit and non-profit making organisations.  Unit 5 Market Research LO2 Understand how legislation and ethics impact on market research activity. All AC.
LO4 Understand the changing nature and pattern of employment	Unit 2 How Businesses and Organisations Work LO4 Understand the resources required by organisations AC 4.1 Analyse the importance of human resources in a named organization.  Unit 9 Human Resources LO1 Understand the role of the Human Resource Function (HR) AC1.2 Outline key legislation impacting the HR function in a named country.
<b>Opportunities for Synoptic Assessment</b>	
Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit AC 3D1 includes learning from LO3 and LO4.	

<b>Opportunities for Skills Development within this unit</b>	
<b>Employability Skills</b>	<b>Study Skills</b>
<p><b>Communication Skills</b> - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation &amp; grammar (SPAG) <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Problem-solving</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information <b>(LO2, LO3, LO4)</b></p>	<p><b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Reading Skills</b> - Identifying different reading materials, e.g. books, articles, online materials <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Thinking Skills</b> - Using critical thinking skills, e.g. reading all information, identifying and interpreting others' positions, arguments and conclusions,</p>

	weighing up opposing arguments, drawing conclusions ( <b>LO2, LO3, LO4</b> )
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<b>Unit 2 How Businesses and Organisations Work</b>			
<b>Unit aims</b>	This unit will provide an overview of key aspects of business. Learners will develop knowledge and understanding of business objectives and structure, customer service, and resource requirements.		
<b>Unit level</b>	3		
<b>Unit code</b>	H/650/4816		
<b>GLH</b>	65		
<b>Credit value</b>	10		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with tutors appropriate organisations on which to base their study. Tutors need to ensure the organisations chosen are suitable. SMEs are recommended as larger organisations are often too complex and accessing the information required can be challenging.</p> <p>Explanations should be illustrated with real world examples. Learner work should demonstrate substantial coverage of the unit indicative content. Learners should use the ATHE template Induction Book to complete their responses.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the objectives of organisations	1.1 Outline, giving examples, the difference between operational, tactical and strategic objectives 1.2 Explain factors influencing choice of objectives in both profit and non-profit making organisations	1M1 Assess the factors that might lead to a change in strategic objectives	
2. Understand the importance of customers and customer service for organisations	2.1 Explain the importance of customers and customer service to organisations	2M1 Evaluate how effective customer service can be achieved for an online business	
3. Understand the organisational structures and legal	3.1 Analyse different organisational structures and legal		

identities of organisations	identities of businesses		<b>LO3 and LO4</b>
4. Understand the resources required by organisations	4.1 Analyse the importance of human resources in a named organisation 4.2 Explain the a) physical resources b) technological/digital resources c) sources of finance required by a named organisation		4D1 Compare and contrast the resource requirements for a named sole trader and a named limited company
5. Understand basic financial statements	5.1 Explain the main components of a) an income statement (profit and loss account) b) a balance sheet c) a cash flow statement 5.2 Explain the elements and purpose of budgets		

## Indicative Content

### LO1 Understand the objectives of organisations

- Different types of organisational objectives, e.g. strategic, operational and tactical
- The focus of possible objectives in profit making businesses and organisations
- The range of possible objectives in non-profit making businesses, organisations and social enterprises such as charities, public sector organisations, e.g. fundraising, campaigning, increasing membership and influence
- Factors influencing the choice of objectives e.g. size and legal structure of organisations, influence of key stakeholders, market conditions. organisational culture and values
- Reasons strategic objectives may change e.g. organisational growth, mergers and takeovers, changes in demand, changes in economic growth, market conditions

### LO2 Understand the importance of customers and customer service for organisations

- Types of customers and their different needs, e.g. final consumers (B2C), business customers (B2B)
- The elements of customer service, e.g. product quality, price, delivery time, after sales service, customer feedback, complaints handling

- The skills of customer service, e.g. service skills, listening, patience, understanding customer needs, respect for customer
- Customer service and business success, e.g. reduced complaints, increased reputation, improved awareness of customer needs and product development, repeat customers, lower marketing costs
- Customer service for online businesses vs other business models

### **LO3 Understand organisational structures and legal identities of businesses**

- Organisational structures, e.g. hierarchical, flat, functional, divisional, matrix, team based
- The advantages and disadvantages of each type of organisational structure.
- The reasons why businesses change their organisational structure, e.g. organisational growth, mergers and takeovers, responding to competition
- The different forms of business legal identity, e.g. sole trader, partnership, private limited company, public quoted company, not for profit organisations
- The advantages and disadvantages of each legal identity
- Comparison of online business vs traditional organisational structure

### **LO4 Understand the resources required by a business**

- Physical resources, including, land, buildings/offices, vehicles, machinery and equipment, raw materials, e.g. storage, stock out and stock piling
- Sources of finance, e.g. personal savings, bank loan, overdraft, debenture, share issues, government or other grants
- Human resources, e.g. the range and types of workers required, qualifications, skills, experience
- External human resources, e.g. subcontractors, auditors, accountants, lawyers
- Technological/digital resources, e.g. computing power, internet access, social media, analytics
- Comparison of online business vs traditional organisational resource requirements

### **LO5 Understand basic financial statements**

- The purpose and importance of an income statement (profit and loss account)
- Main headings of an income statement, i.e. turnover, costs, gross and net profit
- The purpose and importance of a balance sheet
- Main headings of a balance sheet i.e. current assets, current liabilities, owners' equity
- The purpose and importance of cash flow statements to a business
- How cash flow is monitored
- The purpose and importance of budgets
- How budgets are monitored

<b>Suggested Resources</b>	
<b>How Businesses and Organisations Work</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"><li>• Hage M (2017) AS/A-level Year 1 Business Student Guides, Themes 1 to 4</li><li>• Horner, D. (2012) Accounting for Non-Accountants, 8th edition, Kogan Page</li><li>• Pettiger R. (2013) Business Studies for Dummies.</li></ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"><li>• <a href="https://www.tutor2u.net/business">https://www.tutor2u.net/business</a>.</li><li>• <a href="http://www.bbc/bitesize/business.com">www.bbc/bitesize/business.com</a>.</li></ul>

## Unit 2 How Businesses and Organisations Work - Supporting information

### Opportunities for Synoptic Teaching and Learning

Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.

#### Learning Outcome

#### Teaching and learning links to other unit LO/AC

LO1 Understand the objectives of organisations

Unit 1 Business Environment LO1 Understand the range of stakeholders who have an interest and influence on a business  
 LO3 AC3.1 Conduct a STEEPLE analysis and understand the impact of external factors on organisations  
  
 Unit 10 Organisational Strategy LO1 Understand the relationship between organisational vision, mission statement and objectives  
 AC1.2 Analyse how the vision and mission in a named organisation influences its strategic objectives.

LO2 Understand the importance of customers and customer service for organisations

Unit 3 Business Communication LO1 Understand the principles of effective internal and external communication AC 1.1 Explain channels of communication used a) internally and b) externally in organisations  
 LO 3 Understand how organisations communicate with customers All AC.

LO3 Understand the organisational structures and legal identities of organisations

Unit 3 Business Communication LO1 Understand the principles of effective internal and external communication AC 1.1 Explain channels of communication used a) internally and b) externally in organisations

LO4 Understand the resources required by organisations

Unit 1 Business Environment LO4 Understand the changing nature and pattern of employment AC 4.1 Explain how the nature of work and employment have changed globally in recent years.

LO5 Understand basic financial statements

Unit 5 Market research LO3 Select and plan market research AC 3.2 Prepare a market research plan for the chosen market research including industry research.  
  
 Unit 6 Introduction to Financial Controls in Business. All LOs and AC

### Opportunities for Synoptic Assessment

Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit AC 3D1 includes learning from LO3 and LO4.

<b>Opportunities for Skills Development within this unit</b>	
<b>Employability Skills</b>	<b>Study Skills</b>
<p><b>Working Independently</b> - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks <b>(LO1, LO2, LO3, LO4, LO5)</b></p> <p><b>Communication Skills</b> - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation &amp; grammar (SPAG) <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Digital Skills</b> - Handling and judging the reliability of information, using appropriate digital devices, e.g. (computers, laptops, tablets etc) and relevant applications, software, systems and getting online <b>(LO4, LO5)</b></p> <p><b>Problem-solving</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information <b>(LO1, LO5)</b></p>	<p><b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO1, LO2, LO3, LO4, LO5)</b></p> <p><b>Reading Skills</b> - Identifying different reading materials, e.g. books, articles, online materials <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Writing Skills</b> – Understand the purpose of writing, e.g. business and report writing <b>(LO1, LO2, LO3, LO4, LO5)</b></p> <p><b>Thinking Skills</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources <b>(LO1, LO2, LO3, LO4, LO5)</b></p>

### Unit 3 Business Communication

<b>Unit aims</b>	To develop knowledge, skills and understanding of communication theory and the importance of effective communication in business.		
<b>Unit level</b>	3		
<b>Unit code</b>	J/650/4817		
<b>GLH</b>	55		
<b>Credit value</b>	10		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with tutors appropriate organisations on which to base their study. Tutors need to ensure the organisations chosen are suitable. SMEs are recommended as larger organisations are often too complex and accessing the information required can be challenging.</p> <p>For LO1 AC 1.2 and LO3 AC 3.2, at least two organisations should be considered.</p> <p>Explanations should be illustrated with real world examples. Learner work should demonstrate substantial coverage of the unit indicative content.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the principles of effective internal and external communication	1.1 Explain channels of communication used a) internally and b) externally in organisations 1.2 Explain barriers to communication for organisations		
2. Can communicate complex business information effectively in both oral and written forms	2.1 Participate in an activity to demonstrate oral communication in a formal situation, using technology and other appropriate aids to present complex business information effectively	2M1 Manage a question-and-answer session to demonstrate subject knowledge and communication skills	

3. Understand how organisations communicate with customers	3.1 Analyse key factors organisations need to consider when communicating with customers 3.2 Analyse systems for communication with customers in organisations	3M1 Propose and justify solutions to complaints from customers in a named organisation	<b>LO2 and LO4</b>  4D1 Produce a plan to improve personal communication skills
4. Can review personal communication skills	4.1 Using feedback and personal reflection, review the effectiveness of personal a) verbal communication b) written communication c) listening skills d) reading skills		

## Indicative Content

### LO1 Understand the principles of effective internal and external communication

- Communication process – transmitter, message, channel, decoding, receiver, feedback
- Types of communication – formal and informal, verbal and non-verbal, written, internal and external
- Channels of communication e.g. speaking, writing, digital methods, non-verbal methods
- Use of technology e.g. email, telephones/mobile phones, social media, websites, Zoom/virtual meetings, presentation slides
- Barriers to communication, e.g. physical, language, culture, media choice, emotion, disability (such as speech and hearing), technical, organisational structure

### LO2 Communicate complex business information effectively in both oral and written forms

- Simple versus complex information
- Complex business information as having several variables
- Presenting complex information
- Characteristics of an effective slide presentations
- Dangers of over reliance on slide presentations
- Supporting written materials – layouts, use of images, graphs and charts
- Managing question and answer sessions,
- Body language and use of voice – tone and clarity
- Business language – use appropriate to audience needs
- Use of technology e.g. email, social media, websites, virtual meetings, presentation slides
- Awareness of different audience needs e.g. board directors, managers, employees, customers

- Informal and formal business reports and when the use of each is appropriate
- Question and answer sessions - preparation and how to manage these

**LO3 Understand how organisations communicate with customers**

- Factors to consider when communicating with customers e.g. courtesy, appropriate use of media, being proactive, attentiveness/listening, honesty, use of frequently asked questions (FAQ) on websites
- Different media used e.g. websites, webchat, email, personal letters, newsletters, mail drops, point of sale materials, public relations, personal phone calls, use of mobile texting
- Feedback options available to customers e.g. customer surveys, feedback cards, suggestion boxes, complaints

**LO4 Review personal communication skills**

- Obtaining feedback from peers and tutors
- Personal review of communication skills
- Responding to constructive criticism
- Listening skills and personal review of these
- Reading skills and personal review of these
- Skills gap analysis
- Ways to improve personal communication skills e.g. practice, training, observing others
- Development planning – producing a personal development plan
- Objective setting – use of SMART objectives
- Monitoring development plans
- Reviewing developmental objectives and amending as appropriate

Suggested Resources	
<p><b>Unit 3 Business Communication</b></p>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"> <li>• Brieger N., (2011) Business Writing (Collins)</li> <li>• Duarte, N., (2012) HBR Guide to Persuasive Presentations, Harvard Business Review Press</li> <li>• Endress, P., (2016) The Magic of Communication Styles, Cardinal House Press</li> <li>• Gallo, C., (2010) The Presentation Secrets of Steve Jobs: How to Be Insanely Great in Front of Any Audience, McGraw Hill</li> </ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"> <li>• <a href="https://hbr.org/topic/subject/business-communication">https://hbr.org/topic/subject/business-communication</a></li> <li>• <a href="https://www.youtube.com/watch?v=erdLGyEliEg">https://www.youtube.com/watch?v=erdLGyEliEg</a></li> <li>• <a href="https://www.youtube.com/watch?v=2Lkb7OSRdGE">https://www.youtube.com/watch?v=2Lkb7OSRdGE</a></li> <li>• <a href="https://novoresume.com/career-blog/communication-skills">https://novoresume.com/career-blog/communication-skills</a></li> <li>• <a href="https://zety.com/uk/blog/communication-skills">https://zety.com/uk/blog/communication-skills</a></li> </ul>

### Unit 3 Business Communication - Supporting information

#### Opportunities for Synoptic Teaching and Learning

Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.

#### Learning Outcome

#### Teaching and learning links to other unit LO/AC

LO1 Understand the principles of effective internal and external communication

Unit 2 How Businesses and Organisations Work LO3 Understand the organisational structures and legal identities of organisations AC 3.1 3.1 Analyse different organisational structures and legal identities of businesses

Unit 4 Working in Teams LO1 Understand key principles of working in teams AC 1.1 Outline purposes of teams used in organisations and explain roles adopted by team members

Unit 11 Online Marketing LO1 AC 1.1, 1.2 Use of websites and emails

LO2 Be able to communicate complex business information effectively in both oral and written forms

Unit 5 Market Research LO5 Report on findings and results for the chosen market research AC 5.1 Produce a market research report

Unit 8 Principles of Marketing and Sales LO5 Understand how to develop a marketing plan

Unit 11 Online Marketing LO3 Create business content for a social media platform AC 3.2 Create business content for a social media platform

LO3 Be able to review personal communication skills

Unit 7 Leading and Managing People LO5 Review own leadership and management skills AC 5.1 Analyse personal leadership and management skills using feedback obtained from others

Unit 13 Project Management LO4 Review personal role and skills in managing a project AC 4.3 Review personal project management skills using feedback obtained

LO4 Understand how organisations communicate with customers

Unit 2 How Businesses and Organisations Work LO2 Understand the importance of customers and customer service for organisations AC 2.1 Explain the importance of customers and customer service to organisations

Unit 11 Online Marketing LO1 Understand the use of websites and emails for marketing AC 1.1 Explain the key features required of websites for effective (a) online marketing and (b) sales, AC 1.2 Evaluate the effectiveness of emails as an online marketing tool

Unit 12 International Business LO4 Understand barriers to trading internationally AC 4.2 Explain the operational barriers to trading internationally for a named organisation

#### Opportunities for Synoptic Assessment

Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit AC 2D1 includes learning from LO2 and LO3.

Opportunities for Skills Development within this unit	
Employability Skills	Study Skills
<p><b>Working Independently</b> - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Communication Skills</b> - Presenting complex information, e.g. building rapport, understanding body language, managing question and answer sessions <b>(LO2)</b></p> <p><b>Communication Skills</b> - Spoken communication, e.g. knowing your purpose, being prepared, knowing your audience, adapting language to your audience, understanding the importance of non-verbal behaviours <b>(LO2)</b></p> <p><b>Problem-solving</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information <b>(LO1, LO2, LO4)</b></p>	<p><b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Thinking Skills</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Thinking Skills</b> – Reflective thinking, e.g. ensuring we allow time and space to listen to and read feedback so that we become more self-aware and can improve <b>(LO3)</b></p> <p><b>Digital Skills</b> - Using appropriate digital devices, e.g. computers, laptops, and relevant applications, software, systems and getting online <b>(LO2)</b></p>

<b>Unit 4 Working in Teams</b>			
<b>Unit aims</b>	<p>This unit will provide provide an overview of key aspects of working with other people.</p> <p>Learners will gain knowledge and understanding of teams and team roles. There is also an opportunity for learners to develop their own employability skills.</p>		
<b>Unit level</b>	3		
<b>Unit code</b>	L/650/4819		
<b>GLH</b>	60		
<b>Credit value</b>	10		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with tutors appropriate organisations on which to base their study. Tutors need to ensure the organisations chosen are suitable. SMEs are recommended as larger organisations are often too complex and accessing the information required can be challenging.</p> <p>The teams which learners identify could be at the learner's place of work, a student peer team, a sports team or community group.</p> <p>Explanations should be illustrated with real business examples. Learner work should demonstrate substantial coverage of the unit indicative content.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand key principles of working in teams	<p>1.1 Outline purposes of teams used in organisations and explain roles adopted by team members</p> <p>1.2 Analyse:  a) the conditions for effective teamworking and  b) the benefits of team working</p>		

<p>2. Understand leadership and motivation when working in teams</p>	<p>2.1 Explain key leadership styles in organisations  2.2 Explain the key features of effective team leadership  2.3 Explain how team leaders motivate teams and encourage positive working relations in teams</p>	<p>2M1 Evaluate how one motivational theory is used in organisations to improve team productivity</p>	<p><b>LO2 + LO3</b></p> <p>3D1 Analyse the leadership style required for a specific team leader in a named organisation</p>
<p>3. Understand how to work in a team</p>	<p>3.1 Analyse the roles you and others have adopted in teams and the ways in which you have managed team working issues</p>		
<p>4. Can review own employability skills</p>	<p>4.1 Carry out a personal skills audit, using evidence from your work, teamwork or other commitments to justify your strengths and areas for development  4.2 Select an advertisement for a job to which you aspire and compile a personal CV with an accompanying covering letter for the role</p>	<p>4M1 Construct an action plan for developing skills that you identify as requiring further improvement</p>	

## **Indicative Content**

### **LO1 Understand the key principles of working in teams**

- Purposes and reasons for teams in organisations, e.g. project completion, problem solving, enhancing relationships, fostering creativity and innovation, improving morale
- Stages of groups, e.g. Tuckman: forming, storming, norming, performing, adjourning
- Roles within teams, e.g. Belbin: resource investigator, teamworker and co-ordinator (the social roles); plant, monitor evaluator and specialist (the thinking roles), and shaper, implementer and completer finisher (the action or task roles)
- Benefits of team working on individuals and organisations, e.g. sense of ownership of team project, increased motivation and morale, greater responsibility, shared skills
- The conditions for effective teamworking, e.g. good communication, clarity of purpose, diversity of membership, accountability, delegation and support
- Impact of poor communication within teams, e.g. unclear aims and objectives, unresolved conflict, duplication of effort, poor commitment

### **LO2 Understand leadership and motivation when working in teams**

- Leadership theories and styles, e.g. McGregor, Great Man, Trait theory, Skills theory, Situational theory, Contingency theory, Transactional theory and Transformational theory
- Motivation theories, e.g. Taylor, Mayo, Herzberg, Maslow, McClelland, Vroom and Pink
- The principles of good working relationships, e.g. communication, trust, respect, transparency, non-judgement, empowerment and acceptance
- The relationship between teamworking, motivation, productivity and business success

### **LO3 Understand how to work in a team**

- Identifying own role within a teams, e.g. Belbin: resource investigator, teamworker and co-ordinator (the social roles); plant, monitor evaluator and specialist (the thinking roles), and shaper, implementer and completer finisher (the action or task roles)
- Conflict and conflict resolution in teams
- Formal and informal leadership in teams
- Reflection of own contribution to teams

### **LO4 Review own employability skills**

- The difference between generic transferable skills and job specific skills
- Formats for constructing and conducting personal skills audits, e.g. online skills audits. honest identification and evidencing of own strengths and areas for development
- Receiving and interpreting feedback from others
- Using job descriptions and personal specifications
- Formats of curriculum vitae and formal letters
- Compiling own curriculum vitae
- Constructing realistic personal development action plans, e.g. effective use of SMART targets, researching options such as training, studying for qualifications, shadowing
- Managing own time, e.g. to fit in the development plan with other commitments

<b>Suggested Resources</b>	
<b>Unit 4 Working in Teams</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"> <li>• Berne, E., (2016) Games People Play: The Psychology of Human Relationships, Penguin Life</li> <li>• Brent, M., (2017) The Leadership of Teams: How to Develop and Inspire High-performance Teamwork, Bloomsbury Business</li> <li>• Sarratt, R. &amp; R. Chadwick (2020) Team Work: 13 Timeless Principles for Creating Success and Fulfillment as a Team Member, Fidelis Books</li> <li>• Tannenbaum, S., (2020) Teams That Work: The Seven Drivers of Team Effectiveness, OUP USA</li> <li>• Truss, C., (2013) Employee Engagement in Theory and Practice, Routledge</li> </ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"> <li>• <a href="https://www.youtube.com/watch?v=kYjgtLCNqSA">https://www.youtube.com/watch?v=kYjgtLCNqSA</a></li> <li>• <a href="https://smallbusiness.chron.com/can-manager-promote-good-teamwork-15462.html">https://smallbusiness.chron.com/can-manager-promote-good-teamwork-15462.html</a></li> <li>• <a href="https://upjourney.com/real-life-examples-of-teamwork">https://upjourney.com/real-life-examples-of-teamwork</a></li> </ul>

<b>Unit 4 Working in Teams - Supporting information</b>	
<b>Opportunities for Synoptic Teaching and Learning</b>	
Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.	
<b>Learning Outcome</b>	<b>Teaching and learning links to other unit LO/AC</b>
LO1 Understand key principles of working in teams	Unit 3 Business Communication LO1 Understand the principles of effective internal and external communication AC 1.1a) Internal channels of communication
LO2 Understand leadership and motivation when working in teams	Unit 7 Leading and Managing People LO4 Understand how employees are motivated AC 4.1 Explain key motivation theories
LO3 Understand how to work in a team	Unit 3 Business Communication LO2 Communicate complex business information effectively in both oral and written forms AC 2.1 Participate in an activity to demonstrate oral communication
LO4 Be able to develop own employability skills	Unit 3 Business Communication LO3 Understand how organisations communicate with customers AC 3.1 Reviewing personal communication and listening skills  Unit 5 Market Research LO6 Review own research skills AC 6.1 Review own research skills, analysing the effectiveness of these skills  Unit 7 Leading and Managing People LO5 Review own leadership and management skills AC 5.1 Analyse personal leadership and management skills using feedback obtained from others  Unit 13 Project Management LO4 Review personal role and skills in managing a project AC 4.3 Review personal project management skills using feedback obtained
<b>Opportunities for Synoptic Assessment</b>	
Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit AC 3D1 includes learning from LO2 and LO3.	

<b>Opportunities for Skills Development within this unit</b>	
<b>Employability Skills</b>	<b>Study Skills</b>
<b>Working Independently</b> - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks <b>(LO1, LO2, LO3, LO4)</b>	<b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO1, LO2, LO3)</b>
<b>Communication Skills</b> - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation & grammar (SPAG) <b>(LO1, LO2, LO3)</b>	<b>Thinking Skills</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources <b>(LO1, LO2, LO3)</b>

<p><b>Problem-solving</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information (<b>LO1, LO2, LO4</b>) defining challenges and issues, determining and assessing solutions, planning and implementing solutions (<b>LO4</b>)</p> <p><b>Digital Skills</b> - Handling and judging the reliability of information, using appropriate digital devices, e.g. (computers, laptops, tablets etc) and relevant applications, software, systems and getting online</p>	<p><b>Digital Skills</b> - e.g. handling and judging the reliability of information (<b>LO1, LO2, LO3</b>)</p> <p><b>Thinking Skills</b> - Reflective thinking, e.g. ensuring we allow time and space to listen to and read feedback so that we become more self-aware and can improve (<b>LO4</b>)</p> <p><b>Time management</b> - Planning, e.g. organising time around commitments (<b>LO4</b>)</p>
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## Unit 5 Market Research

<b>Unit aims</b>	To develop knowledge and understanding of key marketing principles and practices with a focus on market research. Learners will apply the principles to complete a market research project. They will also develop their research skills by applying these to the completion of the chosen market research project.		
<b>Unit level</b>	3		
<b>Unit code</b>	T/650/4820		
<b>GLH</b>	120		
<b>Credit value</b>	20		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to liaise with their tutor when choosing a market research project to ensure the choice is appropriate and substantial enough to allow all the LO and AC to be fully met.</p> <p>Learner work should demonstrate substantial coverage of the unit indicative content. Learners should use the ATHE Market Research templates to complete their responses.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand key principles of marketing that underpin market research	1.1 Describe the diverse activities carried out in the marketing departments of organisations 1.2 Explain techniques used in market research including 7Ps and segmentation as a tool to identify a target market		1D1 Compare and contrast segmentation strategies for organisations
2. Understand how legislation and ethics impact on market research activity	2.1 Explain ethical issues researchers need to consider when undertaking market research 2.2 Explain how legislation can impact market research activities	2M1 Analyse the impact of failing to act ethically in market research	

<p>3. Can select and plan market research</p>	<p>3.1 Select an appropriate market research project and</p> <ul style="list-style-type: none"> <li>a) explain the reasons for selection</li> <li>b) explain the benefit of setting clear market research objectives</li> <li>c) set market research objectives</li> <li>d) identify research methods</li> <li>e) identify the target market for the chosen research giving reasons for choice</li> </ul> <p>3.2 Prepare a market research plan for the chosen market research including industry research</p>		
<p>4. Undertake research and interpret results for the chosen market research</p>	<p>4.1 Undertake market research in line with the market research plan produced for AC 3.2 and interpret the results</p>	<p>4M1 Analyse the potential difficulties faced when carrying out market research</p>	<p><b>LO4 and LO5</b></p>
<p>5. Can report on findings and results for the chosen market research</p>	<p>5.1 Produce a market research report for the chosen research which includes an analysis of research results and recommendations</p> <p>5.2 Analyse the impact of your results and recommendations on the other organisational functions</p>		<p>5D1 Examine how the market research undertaken in LO4 can impact both strategic and operational decision-making across organisational functions</p>

6. Can review own research skills	6.1 Review own research skills, analysing the effectiveness of these skills	6M1 Produce a personal development plan to build on the strengths and address the gaps identified in own research skills	
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## Indicative Content

### LO1 Understand the principles of marketing

- Definitions and terminology of marketing
- Functions of marketing, e.g. distribution, financing, market research, pricing, product and service management, promotion and selling.
- Marketing objectives, e.g. Build brand awareness, grow market share, launch new products or services, target new customers.
- Market research objectives, e.g. to identify the needs, wants and demands of the target customer, measuring impact of promotional activities
- Relationship of the marketing function with other organisational functions
- Elements of the marketing mix (7Ps)
- Market research techniques, e.g. surveys, focus groups, personal interviews, observation, field trials
- Primary (field) research
- Secondary (desk) research
- Target market
- Market segmentation, e.g. demographic, psychographic, behavioral and geographic segmentation
- Marketing strategy and how this fits with overall organisational strategy

### LO2 Understand how legislation and ethics impact on market research activity

- Legislation impact on marketing and market research e.g. data protection, consumer protection, advertising standards
- Anti-spam legislation
- Compliance with legislation
- Awareness and avoidance of plagiarism
- Self-regulation
- Research ethics, e.g. Honesty, fairness, respect for others, abiding by legislation, obtaining consent

### LO3 Select and plan a market research project

- Setting marketing research objectives e.g. use of SMART criteria, clarity, tangibility
- Market research plans
- Planning market research, e.g. problem definition, development of an approach to the problem, research design formulation, field work or data collection,

- Importance of setting deadlines when carry out market research
- Constraints on market research e.g. scarcity of secondary (desk) research, suitability of secondary (desk) research, human resources, experience of researcher, time, competition
- Finance implications for market research, e.g. Research budget

#### **LO4 Undertake market research for the chosen project and interpret the results**

- Interviewing methods for market research, e.g. surveys, focus groups, personal interviews
- Interpretation of market research results e.g. interpretation of data gathered, statistical analysis, logical reasoning to determine patterns, relationships or trends, awareness of bias
- Using analytical techniques to inform marketing decisions
- Ethical considerations

#### **LO5 Report on research results for the chosen project**

- Market research reports
- Data preparation and analysis
- Presenting research results to a professional standard, e.g. use of appropriate media
- Awareness of audience needs when presenting research results, e.g. prior knowledge and understanding
- Use of technology when presenting research results, e.g. data projectors
- Referencing conventions used in research reporting, e.g. Harvard system
- Engaging in discussion of research undertaken e.g. Engaging in question and answer activities
- Understand the wider implications of market research:
  - Organisational functions, e.g. Finance, human resources, operations, customer service
  - Relationship between marketing and other organisational functions
  - Impact of research on resources available for other organisational functions
  - Inter-functional communication, e.g. internal newsletters, emails, noticeboards
  - Market research objectives and the relationship with the organisation's strategic objectives, including potential conflict
  - Impact of market research on strategic decision taking

#### **LO6 Review own research skills**

- Techniques used to Identify own research skills, e.g. online surveys, self-reflection
- Obtaining feedback on own research skills, e.g. from peers and tutor
- Analysis and evaluation of own research skills
- Recognising the shortfalls in own research skills, e.g. gap analysis
- Planning for developing own research skills, e.g. personal development planning, setting short and long term goals, time management, training, obtaining qualifications

<b>Suggested Resources</b>	
<b>Unit 5 Market Research</b>	<b>Textbooks</b> <ul style="list-style-type: none"><li>• Armstrong, G. and Kotler P, 2020, Principles of Marketing, Pearson</li><li>• Hague P, 2021, Market Research in Practice, Kogan Page</li><li>• Saunders, M. Lewis, P. and Thornhill, A. 2015, Research Methods for Business Students, Financial Times; 7th edition</li><li>• William G. Zikmund, Barry J. Babin, 2012 Essentials of Marketing Research 5th Edition Cengage Learning</li></ul> <b>Online Resources</b> <ul style="list-style-type: none"><li>• <a href="https://www.alchemer.com/resources/blog/market-research-types/">https://www.alchemer.com/resources/blog/market-research-types/</a></li><li>• <a href="https://www.youtube.com/watch?v=NSavcu-clS0">https://www.youtube.com/watch?v=NSavcu-clS0</a></li><li>• <a href="https://www.youtube.com/watch?v=9aKbAws3MZ0">https://www.youtube.com/watch?v=9aKbAws3MZ0</a></li></ul>

## Unit 5 Market Research - Supporting information

### Opportunities for Synoptic Teaching and Learning

This is a synoptic unit for the qualification as there is a strong interface between learning in this unit and all other units in the Diploma in Business qualification. As AC 5D1 draws explicitly on learning from other units, it is important learners complete the other units in this qualification before doing this unit.

Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.

#### Learning Outcome

#### Teaching and learning links to other unit LO/AC

LO1 Understand key principles of marketing that underpin market research

Unit 2 How Businesses and Organisations Work LO2 Understand the importance of customers and customer service for organisations AC 2.1 Explain the importance of customers and customer service to organisations

Unit 8 Principles of Marketing and Sales LO1 Understand the sales and marketing relationship AC 1.1 Analyse the relationship between the sales and marketing functions. LO2, LO3 and LO4 all link to the elements of the marketing mix

LO2 Understand how legislation and ethics impact on market research activity

Unit 1 Business Environment LO3 Conduct a STEEPLE analysis and understand the impact of external factors on organisations AC 3.1 Conduct a STEEPLE analysis to show how the external environment impacts a named organisation

Unit 8 Principles of Marketing and Sales LO5 Understand how to develop a marketing plan AC 5.2 Explain (a) the ethical implications of marketing and sales and (b) the key legislation relating to marketing and sales in a named country

Unit 10 Organisational Strategy LO3 Understand organisational culture and values AC 3.1 Explain a range of organisational cultures and values

LO3 Be able to select and plan a market research project

Unit 2 How Business and Organisations Work LO4 Understand the resources required by organisations AC 4.1 Analyse the importance of human resources in a named organisation AC 4.2 Explain the a) physical resources b) technological/digital resources c) sources of finance required by a named organisation LO5 Understand basic financial statements AC 5.2 Explain the elements and purpose of budgets

Unit 13 Project Management LO2 Plan a project AC 2.1 Use a range of project planning tools to plan a specific project AC 2.2 Outline how the resources needed for a specific project will be procured AC 2.3 Present the project plan in an appropriate format

LO4 Undertake research and analyse results for the chosen market research

Unit 13 Project Management LO3 Implement a project AC 3.1 Implement a project using the plan

<p>LO5 Be able to report on findings and results for the chosen market research project</p>	<p>Unit 3 Business Communication LO2 Be able to communicate complex business information effectively in both oral and written forms AC 2.1 Participate in an activity for communicating complex business information</p> <p>Unit 10 Organisational Strategy LO4 Understand how information is used by management AC 4.1 Explain ways in which information is used by managers in a named organisation</p>
<p>LO6 Be able to analyse own research skills</p>	<p>Unit 4 Working in Teams LO4 Be able to develop own employability skills AC 4.1 Carry out a personal skills audit, using evidence from your work, teamwork or other commitments to justify your strengths and areas for development</p>

**Opportunities for Synoptic Assessment**

Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit AC 5D1 includes learning from LO4 and LO5.

This is a synoptic unit for the qualification and the undertaking of the market research project enables learners to practically utilise in tasks their knowledge and understanding from previous units.

**Opportunities for Skills Development within this unit**

Employability Skills	Study Skills
<p><b>Working Independently</b> - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks <b>(LO1, LO2, LO3, LO4, LO5, LO6)</b></p> <p><b>Problem-solving</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information <b>(LO1, LO2, LO3, LO4, LO5, LO6)</b> defining challenges and issues, determining and assessing solutions, planning and implementing solutions <b>(LO6)</b></p> <p><b>Communication Skills</b> - Presenting complex information, e.g. building rapport, understanding body language, managing question and answer sessions <b>(LO5)</b> Spoken communication, e.g. knowing your purpose, being prepared, knowing your audience, adapting language to your audience, understanding the importance of non-verbal behaviours <b>(LO5)</b></p> <p><b>Time management</b> - Planning, e.g. organising time around commitments <b>(LO6)</b></p>	<p><b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Thinking Skills</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources <b>(LO1, LO2, LO3, LO4)</b> Reflective thinking, e.g. allow time and space to listen and read feedback so that we become more self-aware and can improve <b>(LO6)</b></p> <p><b>Digital Skills</b> - Handling and judging the reliability of information, using appropriate digital devices, e.g. computers, laptops, and relevant applications, software, systems and getting online <b>(LO1, LO2, LO3, LO4, LO5)</b></p> <p><b>Writing Skills</b> - Understanding writing styles, e.g. research paper <b>(LO5)</b></p>

<b>Unit 6 Introduction to Financial Controls in Business</b>			
<b>Unit aims</b>	Learners will develop knowledge and understanding of budgets, budgetary control, costings, cash flow, and basic ratio analysis. They will have the opportunity to construct simple budgets and cashflows.		
<b>Unit level</b>	3		
<b>Unit code</b>	A/650/4822		
<b>GLH</b>	90		
<b>Credit value</b>	15		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learner work must be based on the information provided in the ATHE assignment and should demonstrate substantial coverage of the unit indicative content. Learners should use the ATHE template Workbook to complete their responses.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand business costs and breakeven	1.3 Explain (a) fixed (indirect) costs (b) variable (direct) costs (c) semi-variable costs and (d) marginal costs 1.4 (a) Explain the concept of contribution and (b) the significance of the breakeven level of output	1M1 Analyse the relationship between price and the breakeven level of output	
2. Understand the importance of managing budgets	2.1 Construct a simple budget 2.2 Explain (a) how budgets are monitored using budget variance analysis and (b) the benefits of an effective budgetary control process	2M1 Analyse the reasons why variances can occur in a budget	

3. Can calculate and analyse basic financial ratios	3.1 Calculate the (a) gross and net profit ratios (b) return on capital ratio and (c) the current and quick liquidity ratios 3.2 Analyse the possible reasons for the results from AC 3.1	3M1 Analyse ways businesses can improve their financial ratios	
4. Understand the importance of monitoring cash flow	4.1 Explain the differences between cash and profit 4.2 Construct a simple cash flow statement 4.3 Analyse the importance to a business of managing cash flow		<b>LO2 and LO4</b>  4D1 Evaluate the impact of budgetary and cash flow control on one business function

## Indicative Content

### LO1 Understand business costs and breakeven

- Definition and examples of fixed (indirect) costs: overheads, e.g. rent, insurance, utilities, machinery maintenance
- Definition and examples of variable (direct) costs, e.g. raw materials, packaging and delivery costs
- Definition and examples of semi variable costs, e.g. labour, repairs, power
- Definition of marginal cost
- The figures required to calculate breakeven output: total fixed costs, variable cost per unit, selling price
- The definition of contribution towards fixed costs
- The impact of changing price on sales and the contribution towards breakeven
- The significance of breakeven output.

### LO2 Understand the importance of managing budgets

- The headings and most effective format for a required budget
- The process of budgetary control: preparation, approval, execution, monitoring and evaluation
- Variance analysis, calculating and interpreting favourable and adverse variances

### LO3 Calculate and analyse basic financial ratios

- The gross and net profit ratio formulae
- The return on capital ratio
- The current and quick liquidity ratio formulae
- The meaning and interpretation of the ratios

- Ways of improving financial ratios, e.g. reducing costs, increasing income, reducing debt, increasing productivity of existing machinery

#### **LO4 Understand the importance of monitoring cash flow**

- The difference between cash and profit
- The importance of cash flow to a business
- The components and formats of cash flow statements
- The process of managing cash flow: cash flow forecasting, monitoring, reviewing costs and income, enacting decisions
- The impact of cash flow management on other business functions, e.g. planning, monitoring and controlling departmental expenditure, in light of changes to cash flow.

<b>Suggested Resources</b>	
<b>Introduction to Financial Controls in Business</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"> <li>• Atrill, P. and McLaney, E. (2018) Management Accounting for Decision Makers, 9th edition, Financial Times/Prentice Hall</li> <li>• Horner, D. (2012) Accounting for Non-Accountants, 8th edition, Kogan Page</li> <li>• Iland, A. (2013) Controlling Basic in Business Management, Iland Business Publishing</li> <li>• Rodgers, P. (2007) Commercial Awareness and Business Decision Making Skills. How to Understand and Analyse Company Financial Information, Elsevier</li> </ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"> <li>• <a href="http://www.ft.com">www.ft.com</a> Financial Times website provides financial analysis and information about publishes accounts including international information</li> <li>• <a href="http://www.smallbusiness.chron.com">www.smallbusiness.chron.com</a>.</li> <li>• Websites of larger organisations in UK and internationally will provide financial and other information about business organisations</li> </ul>

Unit 6 Introduction to Budgets and costings - Supporting information	
<b>Opportunities for Synoptic Teaching and Learning</b>	
Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.	
Learning Outcome	Teaching and learning links to other unit LO/AC
LO1 Understand the classification and calculation of business costs and breakeven	Unit 2 How Businesses and Organisations Work LO5 Understand basic financial statements AC 5.1 Explain the main components of: a) an income statement (profit and loss account) and b) a balance sheet and c) a cash flow statement
LO2 Understand the importance of managing budgets	Unit 2 How Businesses and Organisations Work LO5 Understand basic financial statements AC 5.2 Explain the elements and purpose of budgets
LO3 Calculate and analyse basic financial ratios	Unit 2 How Businesses and Organisations Work LO5 Understand basic financial statements AC 5.1 Explain the main components of: a) an income statement (profit and loss account) and b) a balance sheet
LO4 Understand the importance of monitoring cash flow	Unit 2 How Businesses and Organisations Work LO5 Understand basic financial statements AC 5.1 Explain the main components of: c) a cash flow statement
<b>Opportunities for Synoptic Assessment</b>	
Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit 4D1 gives opportunity to assess learning across LO2 and LO4	

Opportunities for Skills Development within this unit	
Employability Skills	Study Skills
<p><b>Working Independently</b> - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Digital Skills</b> - Handling and judging the reliability of information, using appropriate digital devices, e.g. (computers, laptops, tablets etc) and relevant applications, software, systems and getting online; Applying relevant numeracy skills to explore and organise data appropriately <b>(LO3, LO4)</b></p> <p><b>Communication Skills</b> - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation &amp; grammar (SPAG) <b>(LO1, LO2, LO4)</b></p> <p><b>Problem-solving</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information <b>(LO2, LO3)</b></p>	<p><b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Reading Skills</b> - Identifying different reading materials, e.g. books, articles, online materials <b>(LO1, LO2, LO4)</b></p> <p><b>Thinking Skills</b> - Using critical thinking skills, e.g. reading all information, identifying and interpreting others' positions, arguments and conclusions, weighing up opposing arguments, drawing conclusions <b>(LO1, LO3)</b></p>

<b>Unit 7 Leading and Managing People</b>			
<b>Unit aims</b>	Learners will develop knowledge and understanding of the concepts, principles and skills needed to lead and manage people		
<b>Unit level</b>	3		
<b>Unit code</b>	D/650/4823		
<b>GLH</b>	90		
<b>Credit value</b>	15		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with tutors appropriate organisations on which to base their study. Tutors need to ensure the organisations chosen are suitable. SMEs are recommended as larger organisations are often too complex and accessing the information required can be challenging.</p> <p>Learner work should be illustrated with real business examples and should demonstrate substantial coverage of the unit indicative content.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the key elements of leadership and management	1.1 Explain the difference between management and leadership making reference to the key skills and qualities of effective leaders and managers 1.2 Outline the difference between delegation and abdication of responsibility		
2. Understand how employees are led and managed	2.1 Outline key management and leadership theories 2.2 Outline key employee performance		

	<p>indicators used by employers</p> <p>2.3 Explain how employee conflict can be managed</p>		<p><b>LO2 and LO3</b></p>
<p>3. Understand how managers and leaders support employees</p>	<p>3.1 Explain leadership and management approaches to developing employee strengths</p> <p>3.2 Explain how leaders and managers support employees working</p> <p>a) remotely</p> <p>b) in teams</p>	<p>3M1 Analyse how either a manager or leader supports employees in a named organisation</p>	
<p>4. Understand how employees are motivated</p>	<p>4.1 Explain key motivation theories</p>		<p>4D1 Evaluate how employees are motivated in a named organisation</p>
<p>5. Can review own leadership and management skills</p>	<p>5.1 Analyse personal leadership and management skills using feedback obtained from others</p>	<p>5M1 Produce a plan to develop leadership skills identified as requiring improvement</p>	

## **Indicative Content**

### **LO1 Understand the key elements of leadership and management**

- Difference between management and leadership, e.g.:
  - Leaders inspire and motivate, whereas managers plan, organise and coordinate
  - Senior managers will set mission, vision, strategy and objectives in conjunction with the organisation's board of directors; leaders will inspire employees to meet these
- Skills and qualities required for effective management:
  - Interpersonal skills.
  - Ability to communicate and motivate
  - Ability to create a vision
  - Ability to organise and delegate
  - Ability to plan and think strategically
  - Ability to problem solving and make decisions
  - Commercial awareness.
  - Ability to mentor
- Skills and qualities required for effective leadership:
  - Interpersonal skills
  - Approachability
  - Ability to inspire
  - Ability to communicate and motivate
  - Ability to create a vision
  - Ability to influence
  - Positivity
  - Empathy
- Delegation
- Abdication of responsibility

### **LO2 Understand how employees are led and managed**

- Management theories e.g.:
  - Frederick W. Taylor
  - Henri Fayol
  - Max Weber
  - Elton Mayo.
  - Ludwig von Bertalanffy
  - Douglas McGregor
- Leadership theories e.g.:
  - Great Man
  - Trait Theory
  - Contingency
  - Situational Leadership Theory

- Transformational Leadership Theory
- Transactional Theories
- Behavioural Theory
  
- Key employee performance indicators, e.g.:
  - Absenteeism
  - Punctuality
  - Meeting targets, e.g.: sales
  - Productivity
  - Employee turnover
  - Revenue per employee
  - Profit per employee
  
- Managing newly recruited employees, e.g.:
  - Induction
  - Probation period
  - Mentoring
  - Build positive working relationships
  
- Managing teams and team performance, e.g.:
  - Ensuring a balance of team skills and qualities
  - Maintain communication
  - Communicating objectives
  - Regular progress meetings
  - Foster a trust culture
  - Celebrate success
  
- Managing employees working remotely, e.g.:
  - Regular one to one progress meetings
  - Tracking progress
  - Being flexible
  - Setting expectations
  - Ensuring contracted hours are met
  - Regular communication opportunities
  - Prompt response to employee needs
  - Celebrate success
  
- Managing conflict:
  - Talking with the parties involved
  - Focus on behaviour and events, not on personalities
  - Listening to all parties
  - Identify points of agreement and disagreement
  - Prioritise the areas of conflict
  - Develop a plan to work on each conflict

### **LO3 Understand how managers and leaders support employees**

- Approaches to developing employees, e.g.: developing employee strengths
  - Listening to employees
  - Providing constructive feedback
  - Open door approach
  - Employee welfare
  - Buddy systems
  - Foster a trust culture
- Support for employees working remotely, e.g.:
  - Setting expectations early to encourage healthy work schedules
  - Daily 'virtual huddles'
  - Regular video meetings which are short, but focused
  - Tracking employees' progress
  - Listen and act on employee concerns
  - Offer praise and feedback
- Support for teams, e.g.:
  - Ensuring clear communication
  - Listening to concerns about fair workload within the team
  - Ensuring clarity of team roles
  - Ensuring team members have opportunity to give their views
  - Offer praise and feedback

### **LO4 Understand how employees are motivated**

- Motivation theories e.g.:
  - Maslow
  - Herzberg
  - McClelland
  - Vroom
  - Porter and Lawler
- How employees are motivated, e.g.
  - Use of targets
  - Use of reward systems, e.g. remuneration package, bonuses
  - Senior managers will set mission, vision, strategy and objectives in conjunction with the organisation's board of directors; leaders will inspire employees to meet these
  - Managers use process, leaders use creativity
  - Managers use a structured approach; leaders are more spontaneous
  - Managers sympathise; leaders empathise

### **LO5 Review own leadership and management skills**

- Obtaining feedback on personal skills from peers and others
- Assessing own leadership skills

- Assessing own management skills
- Development planning to improve personal leadership and management skills

<b>Suggested Resources</b>	
<b>Unit 7 Leading and Managing People</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"> <li>• Gill, R., (2011) Theory and Practice of Leadership, SAGE Publications Ltd</li> <li>• Brent, M., (2017) The Leadership of Teams: How to Develop and Inspire High-performance Teamwork, Bloomsbury Business</li> <li>• Green, G., (2021) The Art of Influencing People: A Guide to Effective Communication</li> <li>• Hasson, G., (2020) Mental Health and Wellbeing in the Workplace: A Practical Guide for Employers and Employees, Capstone</li> <li>• Hutchinson, S., (2018) Performance Management: Theory and Practice, Kogan Page</li> <li>• Maslow, A. H., (2013) A Theory of Human Motivation, Wilder Publications</li> </ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"> <li>• <a href="https://www.youtube.com/watch?v=LqKKH7V4O1w">https://www.youtube.com/watch?v=LqKKH7V4O1w</a></li> <li>• Harvard Business Review <a href="http://www.hbr.org">www.hbr.org</a></li> <li>• Forbes <a href="http://www.forbes.com">www.forbes.com</a></li> </ul>

## Unit 7 Leading and Managing People - Supporting information

### Opportunities for Synoptic Teaching and Learning

Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.

#### Learning Outcome

#### Teaching and learning links to other unit LO/AC

LO1 Understand the key elements of leadership and management

Unit 13 Project Management LO1 Understand the principles of project management AC 1.1 Explain the principles and process of project management, AC 1.2 Outline the skills and qualities necessary to effectively manage a project

LO2 Understand how employees are managed

Unit 9 Human Resources LO4 Understand how employees are monitored, AC 4.1 Explain the elements of effective appraisal practice and AC 4.2 Explain the use of KPIs when monitoring employee performance

Unit 10 Organisational Strategy LO4 Understand how information is used by management AC 4.1 Explain ways in which information is used by managers in a named organisation LO5 Understand Strategic change and how it is managed AC 5.2 Explain the process for change management including how resistance to change can be managed

LO3 Understand how managers and leaders support employees

Unit 9 Human Resources LO3 Understand how employees are supported and developed, all LO3 AC consider supporting employees and both leaders and managers will have responsibilities for this

LO4 Understand how employees are motivated

Unit 4 Working in Teams LO2 Understand leadership and motivation when working in teams, AC 2.3 Explain how team leaders motivate teams and encourage positive working relations in teams

LO5 Review own leadership and management skills

Other units within the qualification require learners to review personal skills in a particular context e.g.:

Unit 3 Business Communication LO4, reviewing communication skills,  
Unit 4 Working in Teams LO4, reviewing employability skills  
Unit 5 Market Research LO6, reviewing research skills  
Unit 13 Project Management LO4 reviewing project management skills

### Opportunities for Synoptic Assessment

Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit, AC 3D1 Analyse the potential impact of ineffective leadership and management on employees, offers opportunity to assess understanding across both LO2 and LO3

Opportunities for Skills Development within this unit	
Employability Skills	Study Skills
<p><b>Working Independently</b> - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks <b>(LO1, LO2, LO3, LO4, LO5)</b></p> <p><b>Communication Skills</b> - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation &amp; grammar (SPAG) <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Problem-solving</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information <b>(LO1, LO2, LO3, LO4)</b> defining challenges and issues, determining and assessing solutions, planning and implementing solutions <b>(LO5)</b></p> <p><b>Digital Skills</b> - Handling and judging the reliability of information, using appropriate digital devices, e.g. (computers, laptops, tablets etc) and relevant applications, software, systems and getting online <b>(LO1, LO2, LO3, LO4)</b></p>	<p><b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Thinking Skills</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Thinking Skills</b> - Reflective thinking, e.g. ensuring we allow time and space to listen to and read feedback so that we become more self-aware and can improve <b>(LO5)</b></p> <p><b>Digital Skills</b> - Handling and judging the reliability of information <b>(LO1, LO2, LO3, LO4)</b></p> <p><b>Time management</b> - Planning, e.g. organising time around commitments <b>(LO5)</b></p>

<b>Unit 8 Principles of Marketing and Sales</b>			
<b>Unit aims</b>	Learners will develop knowledge and understanding of the principles of marketing and sales. Learners will also begin to gain the skills required to undertake marketing activities. Learners will have the opportunity to apply the principles and use the skills to complete a marketing mix plan.		
<b>Unit level</b>	3		
<b>Unit code</b>	F/650/4824		
<b>GLH</b>	90		
<b>Credit value</b>	15		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with their tutors suitable products or services on which to create a marketing mix plan for 5D1. Likewise, they should be guided as to the countries on which to base their study for LO5 as countries have different laws relating to marketing and sales.</p> <p>Learners will have to produce a substantial piece of work when developing a marketing mix plan for 5D1. Learner work should demonstrate substantial coverage of the unit indicative content.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the sales and marketing relationship	1.1 Analyse the relationship between the sales and marketing functions		
2. Understand the price and promotion elements of the marketing mix	2.1 Explain (a) what is meant by the marketing mix and (b) the different strategies for pricing products and services as part of the marketing mix 2.2 Explain different approaches to promoting products and services 2.3 Analyse market segmentation strategies	<b>LO2 and LO3</b>  3M1 Analyse how marketing and sales strategies change during a product's life cycle	

3. Understand the product and place elements of the marketing mix	3.1 Explain the product life cycle for a product or service 3.2 Explain the role of place and recent trends in the choice of distribution channel		<b>LO2, LO3, LO4 and LO5</b>  5D1 Develop a marketing mix plan for a product or service
4. Understand the importance of elements of the marketing mix for services	4.1 Explain the role of physical evidence, people and processes as part of the marketing mix for services	4M1 Analyse the importance of physical evidence, people and process for a named service	
5. Understand how to develop a marketing plan	5.1 Explain the elements of a marketing plan 5.2 Explain (a) the ethical implications of marketing and sales and (b) the key legislation relating to marketing and sales in a named country		

## Indicative Content

### LO1 Understand the sales and marketing relationship

- The role of the marketing function both traditional and online-marketing; e.g. Market research, product planning, pricing decisions, promotion, distribution channels
- The role of the sales function; e.g. setting sales targets, relationships with potential customers, converting enquiries to sales
- The relationship between the functions when successfully working together, e.g.: marketing and sales budgets (finance relationship), Customer Relationship Management (CRM) recording and organisation, marketing and sales employee skills needs (HRM relationship), market research findings (design and production relationship)

### LO2 Understand the price and promotion elements of the marketing mix.

- The marketing mix - the 7 Ps; Price, Place, Promotion, People, Process and Physical
- Pricing Strategies - cost plus, price skimming, penetration pricing, value-based pricing, destroyer pricing
- The purposes and approaches to promotion in sales
- Above and below the line promotion and advertising – different media and different audiences
- Strategies for segmenting markets – geographic, demographic, psychographic, behavioural.

### LO3 Understand the product and place elements of the marketing mix

- Definitions and the differences between products and services
- The stages of the Product Life Cycle – development, introduction, growth, maturity and decline
- Marketing and sales strategies linked to each stage of the Product Life Cycle
- Strategies to extend the Product Life Cycle
- Channels of distribution, e.g. wholesalers, retailers, Internet, direct, indirect
- The importance of place (channel of distribution)
- Trends affecting choice of distribution channels, e.g. greater use of online purchasing

### LO4 Understand the importance of elements of the marketing mix for services

- Services characteristic, e.g. intangibility, consumed at point of sales, etc.
- People, e.g. customer service, attitude, body language, service knowledge
- Physical evidence, e.g. ambience, logo, branding, packaging
- Processes, e.g. payment methods, loyalty cards, electronic point of sale
- The role and importance of people, physical evidence and processes

### LO5 Understand how to develop a marketing plan

- Marketing plans; purpose, formats, elements: USP, target customers, pricing strategy, distribution plan, marketing materials, promotion strategy, financial projections, etc.
- Legislation and regulation of sales and marketing advertising and activities within a selected country
- Ethical issues within sales and marketing - false advertising claims, products harmful to health, selective marketing practices, unethical data collection practices, forced segmentation and the application of pricing strategies

<b>Suggested Resources</b>	
<b>Principles of Marketing and Sales</b>	<b>Textbooks</b> <ul style="list-style-type: none"><li>• Armstrong, G. and Kotler P, (2015) Marketing: An Introduction, Pearson</li><li>• Masterson, R. and Pickton, D. (2014) Marketing: An Introduction 2014, Pickton Publishing</li><li>• The New Rules of Marketing and PR (2015) David Meerman Scott</li></ul> <b>Online Resources</b> <ul style="list-style-type: none"><li>• <a href="https://www.tutor2u.net/business/reference/promotion-introduction">https://www.tutor2u.net/business/reference/promotion-introduction</a></li><li>• <a href="http://www.marketing-made-simple.com">www.marketing-made-simple.com</a></li><li>• <a href="http://www.smallbusiness.chron.com">www.smallbusiness.chron.com</a></li></ul>

## Unit 8 Principles of Marketing and Sales - Supporting information

### Opportunities for Synoptic Teaching and Learning

Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.

#### Learning Outcome

#### Teaching and learning links to other unit LO/AC

LO1 Understand the sales and marketing functions

Unit 5 Market Research LO1 Understand key principles of marketing that underpin market research AC 1.1 Describe the diverse activities carried out in the marketing departments of organisations

Unit 8 Online Marketing LO1 Understand the use of websites and emails for marketing. All AC. LO2 Understand Search Engine Optimisation (SEO) All AC.

LO2 Understand the product life cycle

Unit 5 Market Research LO1 Understand key principles of marketing that underpin market research AC 1.2 Explain techniques used in market research including 7Ps and segmentation as a tool to identify a target market

LO3 Understand pricing and promotional strategies

Unit 5 Market Research LO1 Understand key principles of marketing that underpin market research AC 1.2 Explain techniques used in market research including 7Ps and segmentation as a tool to identify a target market

Unit 11 Online Marketing LO1 Understand the use of websites and emails for marketing All AC. LO3 Create business content for a social media platform AC 3.1 Explain the characteristics of effective social media content

LO4 Understand elements of the marketing mix for services

Unit 5 Market Research LO1 Understand key principles of marketing that underpin market research AC 1.2 Explain techniques used in market research including 7Ps and segmentation as a tool to identify a target market

LO5 Understand how to develop a marketing plan.

Unit 3 Business Communication LO2 Be able to communicate complex business information effectively in both oral and written forms. AC 2.1 Participate in an activity to demonstrate oral communication in a formal situation, using technology and other appropriate aids to present complex business information effectively

Unit 5 Market Research LO2 Understand how legislation and ethics impact on market research activity AC 1.1 Explain ethical issues researchers need to consider when undertaking market research AC 1.2 Explain how legislation can impact market research activities

Unit 11 Online Marketing LO4 Understand online marketing data, legislation and regulation AC 4.2 Explain the purpose of data protection legislation.

### Opportunities for Synoptic Assessment

Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit AC 3M1 offers opportunities to assess learning across LO2 and LO3. AC 5D1 offers opportunities to assess learning across LO2, LO3, LO4 and LO5

### Opportunities for Skills Development within this unit

#### Employability Skills

**Communication Skills** - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation & grammar (SPAG) **(LO1, LO5)**

**Working Independently** – Written communication, e.g. appropriate formats, style and tone, spelling, punctuation & grammar (SPAG) **(LO1, LO2, LO3, LO4, LO5)**

**Digital Skills** - Using appropriate digital devices (computer, laptops, tablets, etc.) and relevant applications, software, systems and getting online. Handling and judging the reliability of information **(LO3, LO4, LO5)**

#### Study Skills

**Using sources of information** - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources **(LO1, LO2, LO3, LO4, LO5)**

**Reading Skills** - Identifying different reading materials, e.g. books, articles, online materials **(LO5)**

**Thinking Skills** - Using critical thinking skills, e.g. reading all information, identifying and interpreting others' positions, arguments and conclusions, weighing up opposing arguments, drawing conclusions **(LO1, LO2, LO5)**

<b>Unit 9 Human Resources</b>			
<b>Unit aims</b>	Learners will develop knowledge and understanding of the HR function including recruitment, selection, retention, monitoring and development of employees.		
<b>Unit level</b>	3		
<b>Unit code</b>	H/650/4825		
<b>GLH</b>	90		
<b>Credit value</b>	15		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with tutors appropriate organisations on which to base their study. Tutors need to ensure the organisations chosen are suitable. SMEs are recommended as larger organisations are often too complex and accessing the information required can be challenging. Learners should be encouraged to focus their study on a country with which they are familiar.</p> <p>Learner work should be illustrated with real business examples and should demonstrate substantial coverage of the unit indicative content.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the role of the Human Resource Function (HR)	1.1 Explain the role of the HR function 1.2 Outline key legislation impacting the HR function in a named country	1M1 Analyse the relationship of HR with other organisational functions	<b>LO1 and LO2</b>  2D1 Evaluate the impact of employment legislation on the recruitment and selection process in a named country
2. Understand HR responsibilities when recruiting employees or terminating employee contracts	2.1 Explain the steps needed for effective recruitment and selection of employees 2.2 Explain how HR manages the termination of employee contracts including the use of disciplinary procedures		

3. Understand how employees are supported and developed	3.1 Compare and contrast training, coaching, mentoring and counselling methods 3.2 Analyse reasons why the need for workplace welfare has increased in recent years 3.3 Explain how organisations provide workplace welfare using examples	3M1 Analyse the issues HR faces when supporting employees working remotely	3D1 Analyse how a named organisation manages workplace stress
4. Understand how employees are monitored	4.1 Explain the elements of effective appraisal practice 4.2 Explain the use of KPIs when monitoring employee performance	4M1 Evaluate approaches to monitoring employee performance in a named organisation	

## Indicative Content

### LO1 Understand the role of the Human Resource Function (HR)

The role of the HR function to include:

- Recruitment
- Selection
- Retention
- Support and development of employees
- Remuneration
- Termination of employee contracts
- Liaison with unions
- Compliance with legislation
- Management of grievance and disciplinary procedures

Relationship of HR to other organisational functions to include:

- Management of budgets
- Organisational and functional skills needs analysis

Introduction to employment law to include compliance with:

- Discrimination

- Health and safety
- Equality and diversity
- Data protection
- Employment legislation

## **LO2 Understand HR responsibilities when recruiting employees or terminating employee contracts**

- HR needs analysis
- Job analysis
- Preparing job description and personal specification documentation
- Interviewing potential employees
- Equality and diversity
- Disciplinary procedures
- Termination of employee contracts to include: retirement, health grounds, misconduct, promotion, redundancy, employee leaving

## **LO3 Understand how employees are supported and developed**

- Induction of new employees
- Development of employees to include: training, coaching, mentoring and counselling methods
- Management shadowing
- Secondment opportunities
- Grievance procedures
- Workplace welfare to include: managing workplace stress, supporting employees working remotely
- The increased need for workplace welfare:
  - Increased pressures on workers as workloads increase due to staff shortages
  - Increased costs of living pushing workers to take on more hours and overtime
  - Increased use of remote working e.g. circumstances due to pandemic, leading to isolation of workers, lack of social interaction causing stress
  - Improved understanding of welfare needs

## **LO4 Understand how employees are monitored**

- Employee observation
- Goal and target setting
- Appraisal process
- Peer appraisal
- 360-degree appraisal
- Self-monitoring
- Key Performance Indicators (KPIs), e.g.:
  - Absenteeism
  - Punctuality
  - Sales targets
  - Productivity
  - Employee turnover

- Revenue per employee
- Profit per employee

<b>Suggested Resources</b>	
<b>Unit 9 Human Resources</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"> <li>• Armstrong, A. and Taylor, F. 2017 Armstrong's Handbook of Human Resource Management Practice, Kogan Page; 14th edition</li> <li>• Leatherbarrow C and Fletcher J. 2018, Introduction to Human Resource Management: A Guide to HR in Practice, Kogan Page; 4th edition</li> <li>• Picardi, C.A, 2019, Recruitment and Selection: Strategies for Workforce Planning &amp; Assessment 1st Edition</li> <li>• Senyucel, Z. Managing the Human Resource in the 21st century, BookBoon</li> </ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"> <li>• <a href="https://www.tutor2u.net/business/reference/non-financial-methods-to-improve-employee-performance-and-motivation">https://www.tutor2u.net/business/reference/non-financial-methods-to-improve-employee-performance-and-motivation</a></li> <li>• <a href="https://www.forbes.com/sites/forbesbusinesscouncil/2022/11/04/the-rise-of-corporate-wellness-to-support-employee-retention/?sh=980bd0046494">https://www.forbes.com/sites/forbesbusinesscouncil/2022/11/04/the-rise-of-corporate-wellness-to-support-employee-retention/?sh=980bd0046494</a></li> <li>• <a href="https://www.youtube.com/watch?v=A2HFusWQleE">https://www.youtube.com/watch?v=A2HFusWQleE</a></li> </ul>

<b>Unit 9 Human Resources - Supporting information</b>	
<b>Opportunities for Synoptic Teaching and Learning</b>	
Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.	
<b>Learning Outcome</b>	<b>Teaching and learning links to other unit LO/AC</b>
LO1 Understand the role of the Human Resource Function (HR)	Unit 2 How Businesses and Organisations Work LO4 Understand the resources required by organisations AC 4.1 Analyse the importance of human resources in a named organisation
LO2 Understand HR responsibilities when recruiting employees or terminating employee contracts	Unit 2 How Businesses and Organisations Work LO4 Understand the resources required by organisations AC 4.1 Analyse the importance of human resources in a named organisation
LO3 Understand how employees are supported and developed	Unit 1 The Business Environment LO4 AC 4.1 Explain how the nature of work and employment have changed globally in recent years  Unit 7 Leading and Managing People LO3 Understand how managers and leaders support employees AC 3.2 Explain how managers and leaders support employees working a) remotely and b) in teams LO4 Understand how employees are motivated AC 4.2 Analyse how employees are motivated in a named organisation
LO4 Understand how employees are monitored	Unit 7 Leading and Managing People LO2 Understand how employees are led and managed AC 2.2 Outline key employee performance indicators used in a named organisation  Unit 10 Organisational Strategy LO4 Understand how information is used by management AC 4.1 Explain ways in which information is used by managers in a named organisation
<b>Opportunities for Synoptic Assessment</b>	
Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. AC 2D1 offers opportunity to assess learners' understanding across LO1 and LO2 within this unit.	

<b>Opportunities for Skills Development within this unit</b>	
<b>Employability Skills</b>	<b>Study Skills</b>
<b>Working Independently</b> - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks <b>(LO1, LO2, LO3, LO4)</b>	<b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO2, LO3)</b>
<b>Communication Skills</b> - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation & grammar (SPAG) <b>(LO1, LO2, LO3, LO4)</b>	<b>Thinking Skills</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources <b>(LO1, LO2, LO3, LO4)</b>

**Problem-solving** - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information (**LO2, LO3**)

**Digital Skills** - Handling and judging the reliability of information, using appropriate digital devices, e.g. (computers, laptops, tablets etc) and relevant applications, software, systems and getting online (**LO2, LO3, LO4**)

**Digital Skills** - Handling and judging the reliability of information (**LO2**)

<b>Unit 10 Organisational Strategy</b>			
<b>Unit aims</b>	Learners will develop knowledge and understanding of strategic issues in business such as vision, mission and growth. Learners will also be introduced to organisational growth, organisational culture, how information is used and how change is managed.		
<b>Unit level</b>	3		
<b>Unit code</b>	J/650/4826		
<b>GLH</b>	90		
<b>Credit value</b>	15		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with tutors appropriate organisations on which to base their study. Tutors need to ensure the organisations chosen are suitable. SMEs are recommended as larger organisations are often too complex and accessing the information required can be challenging.</p> <p>Learner work should be illustrated with real business examples and should demonstrate substantial coverage of the unit indicative content.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the relationship between organisational vision, mission statement and objectives	1.1 Explain the relationship between an organisation's mission statement and vision 1.2 Analyse how the vision and mission in a named organisation influences its strategic objectives	1M1 Analyse the benefits of having a clear vision and mission statement for a named organisation	

2. Understand the importance of strategic planning for growth	2.1 Explain reasons for organisational growth 2.2 Explain key strategic planning tools and growth models 2.3 Analyse the importance of strategic planning for growth		2D1 Analyse the implications of rapid growth for a named organisation
3. Understand organisational culture and values	3.1 Explain a range of organisational cultures and values		
4. Understand how information is used by management	4.1 Explain ways in which information is used by managers in a named organisation 4.2 Explain key decision-making models	4M1 Analyse the importance of reliable information for strategic decision making	
5. Understand organisational change and how it is managed	5.1 Explain reasons why organisations need to change 5.2 Explain the process for change management including how resistance to change can be managed	5M1 Analyse the need for effective communication when managing change	<b>LO3 and LO5</b> 5D1 Evaluate how organisational culture can impact managing change

## Indicative Content

### LO1 Understand the relationship between organisational vision, mission statement and objectives

- Vision: content to include clarifying a business's meaning and purpose for stakeholders, especially employees; description of the desired long-term results of a company's efforts.
- Vision: benefits to organisations and stakeholders
- Mission statements: content to include a declaration of the purpose of an organisation and how it serves its customers; a description of the company, what it does, and its objectives
- Mission statement: benefits to organisations and stakeholders

- Strategic and operational objectives
- Importance of clarity of vision, mission statements and objectives

## **LO2 Understand the importance of strategic planning for growth**

- Organisational growth models as a mix of strategies that align with an organisation's vision and goals, e.g.: Greiner's Model of Growth Phases, Churchill and Lewis growth model
- Types of growth e.g. organic growth, inorganic growth such as acquisition or merger, joint venture, franchising, sustainable growth
- Reasons for organisational growth: globalisation, diversification, increased demand, accessing new markets, to gain economies of scale
- Strategic planning for growth
- Planning tools for growth e.g. the use of PESTLE, SWOT, ANSOFF
- Strategic directions for organisational growth: Ansoff's Matrix, Porter's Five Forces

## **LO3 Understand organisational culture and values**

- Types of culture: Entrepreneurial, Hierarchical, Clan, Profit
- Culture theory e.g.:
  - Charles Handy: Role, Task, Power, Person Cultures
  - Johnson and Scholes: The Cultural Web
  - Edgar Schein Model of Organisational Culture
- Organisational values: the guiding principles that provide an organisation with purpose and direction, e.g.:
  - integrity
  - innovation
  - sustainability
  - collaboration
  - teamwork
  - passion
- Corporate Social Responsibility (CSR), e.g.:
- Acting ethically
- Corporate transparency
- Environmental awareness
- Workplace diversity
- Whistle blower protection
- Data protection
- Customer prioritisation
- Community awareness
  - Being accountable

## **LO4 Understand how information is used by management**

- Data and Information used by management e.g.:
  - Customer details
  - Sales data
  - Website traffic

- Revenue and costs
- Financial ratios
- Market share
- Market growth
- Employee absenteeism
- Employee retention/turnover
- Competitor details
- How data and information is used e.g.:
  - Finding new customers
  - Increasing customer retention
  - Improving customer service
  - Better managing marketing efforts
  - Tracking social media interaction
  - Predicting sales trends
- Decision making models e.g.:
  - Intuitive
  - Rational
  - Creative
- The need for reliable information
  - Needed for well-informed decision-making
  - Used to make forecasts, e.g. sales, employee recruitment
  - Needed to understand market trends

## **LO5 Understand organisational change and how it is managed**

- Reasons for organisational change – internal e.g.:
  - Rationalisation
  - Downsizing
  - Growth
  - Changes to senior management team (SMT)
  - Acquisition or merger
- Reasons for organisational change – external e.g.:
  - Changes in legislation
  - Changes in market conditions
  - Being subject to acquisition
- Management of change and resistance to change:
  - Planning
  - Transparency
  - Communicating
  - Training
  - Employee participation
  - Leadership
  - Implementation
  - Monitoring
  - Controlling
  - Reviewing
- Approaches to change management, e.g.:

- Kotter's 8 steps for leading change
- Kurt Lewin's change philosophy: Unfreeze, Change, Refreeze
- McKinsey's 7-S Model
- ADKAR Change Management Model

<b>Suggested Resources</b>	
<b>Unit 10 Organisational Strategy</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"> <li>• Adair, J., (2011) Decision Making and Problem-Solving Strategies: Creating Success Series, Audible Ltd</li> <li>• Hofstede, G. (2010) Cultures and Organizations: Software of the Mind, McGraw Hill</li> <li>• Hesterly, W. and Barney, J. B., 2015, Strategic Management and Competitive Advantage: Concepts and Cases, Pearson India</li> </ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"> <li>• <a href="https://www.youtube.com/watch?v=Fjo1TPe5isw">https://www.youtube.com/watch?v=Fjo1TPe5isw</a></li> <li>• <a href="https://www.techtarget.com/searchcio/definition/strategic-management">https://www.techtarget.com/searchcio/definition/strategic-management</a></li> <li>• <a href="https://www.youtube.com/watch?v=o0U0gwnhek">https://www.youtube.com/watch?v=o0U0gwnhek</a></li> </ul>

## Unit 10 Organisational Strategy - Supporting information

### Opportunities for Synoptic Teaching and Learning

Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.

#### Learning Outcome

#### Teaching and learning links to other unit LO/AC

LO1 Understand the relationship between organisational vision, mission statement and objectives

Unit 2 How Businesses and Organisations Work LO1 Understand the objectives of organisations AC 1.1 Outline, giving examples, the difference between operational, tactical and strategic objectives

LO2 Understand the importance of strategic planning for growth

Unit 12 International Business LO1 Understand the nature of international trade, AC 1.1 Analyse the implications to a named business of trading internationally

LO3 Understand organisational culture and values

Unit 5 Market Research LO2 Understand how legislation and ethics impact on market research activity, AC 2.1 Explain ethical issues researchers need to consider when undertaking market research

LO4 Understand how information is used by management

Unit 5 Market Research LO5 Report on findings and results for the chosen market research, AC 5.1 Produce a market research report for the chosen research which includes an analysis of research results and recommendations, AC 5D1 Examine how the market research undertaken can impact both strategic and operational decision-making across organisational functions

Unit 6 Introduction to Financial Controls in Business LO1 – LO4 These LO can all be linked to Unit 10, LO4 as the learning concerns financial information and its use

Unit 7 Leading and Managing People LO2 Understand how employees are managed, AC 2.2 Outline key employee performance indicators used by managers in a named organisation

Unit 9 Human Resources LO4 Understand how employees are monitored, AC 4.2 Explain the use of KPIs when monitoring employee performance

Unit 11 Online Marketing LO4 Understand online marketing data and legal regulation, AC 4.1 Explain (a) the purpose of and (b) the ways in which data can be gathered

LO5 Understand strategic change and how it is managed

Unit 1 Business Environment LO4 Understand the changing nature and pattern of employment, AC 4.1 Explain how the nature of work and employment have changed globally in recent years

Unit 7 Leading and Managing People LO2 Understand how employees are managed, AC 2.3 Explain how employee conflict can be managed

## Opportunities for Synoptic Assessment

Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. LO5 5D1 allows for synoptic assessment of learners' understanding across LO3 and LO5.

## Opportunities for Skills Development within this unit

### Employability Skills

**Working Independently** - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks (**LO1, LO2, LO3, LO4, LO5**)

**Communication Skills** - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation & grammar (SPAG) (**LO1, LO2, LO3, LO4, LO5**)

**Problem-solving** - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information (**LO1, LO2, LO4**)

**Digital Skills** - Handling and judging the reliability of information, using appropriate digital devices, e.g. (computers, laptops, tablets etc) and relevant applications, software, systems and getting online (**LO1, LO2, LO4, LO5**)

### Study Skills

**Using sources of information** - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources (**LO1, LO2, LO4**)

**Thinking Skills** - Using analytical skills, e.g. research skills, handling information, consulting multiple sources (**LO1, LO2, LO4, LO5**)

**Digital Skills** - Handling and judging the reliability of information (**LO1, LO2, LO4, LO5**)

<b>Unit 11 Online Marketing</b>			
<b>Unit aims</b>	Learners will develop knowledge and understanding of the principles and practices of online marketing. They will have the opportunity to create content for a social media platform.		
<b>Unit level</b>	3		
<b>Unit code</b>	K/650/4827		
<b>GLH</b>	90		
<b>Credit value</b>	15		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with tutors appropriate organisations on which to base their study. Tutors need to ensure the organisations chosen are suitable. SMEs are recommended as larger organisations are often too complex and accessing the information required can be challenging. Learners should be encouraged to focus their study on a country with which they are familiar.</p> <p>Learner work should be illustrated with real business examples and should demonstrate substantial coverage of the unit indicative content. For AC 3.2, learners should create sample business content on a social media platform and submit this as a digital file for marking/moderation.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the use of websites and emails for marketing	1.1 Explain the key features required of websites for effective (a) online marketing and (b) sales 1.2 Evaluate the effectiveness of emails as an online marketing tool	1M1 Analyse the implications of using online marketing for a named organisation	<b>LO1 and LO2</b>
2. Understand Search Engine Optimisation (SEO)	2.1 Analyse the implications of different approaches to achieving Search Engine Optimisation		

3. Can create business content for a social media platform	3.1 Explain the types and characteristics of effective social media content 3.2 Create business content for a social media platform 3.3 Analyse the effectiveness of the content in AC 3.2, using feedback obtained from others		3D1 Evaluate the effectiveness of social media in online marketing
4. Understand online marketing data and legal regulation	4.1 Explain (a) the purpose of data gathered for online marketing (b) the ways in which data can be gathered 4.2 Explain the purpose of data protection legislation	4M1 Analyse data protection legislation in a specified country	

## Indicative Content

### LO1 Understand the use of websites and emails for marketing

- Functions of business websites, e. g. create an online presence, raise awareness of the business, product or service, provide information, engage with potential customers, create sales
- The features of business websites, e.g., responsive pages, web copy quality, images, ease of navigation, call to action etc.
- The differences between sales and marketing
- Use and effectiveness of email marketing
- The resource, organisational and staffing implications of online marketing
- Types of e-marketing communications
- Benefits of email marketing, e.g. larger reach, targets subscribers, higher click-through rate, higher ROI, stable method, etc.
- Legal and ethical restrictions on the use of e-marketing

### LO2 Understand Search Engine Optimisation (SEO)

- Definition of SEO
- SEO tools, e.g., keywords, rank tracking, site speed, content optimisation, links, analytics and reporting
- Different approaches to SEO through content creation, e.g. free tools, case studies, product data information, product reviews, information on company, blogs

- SEO through paid SEO services.

### LO3 Create business content for a social media platform

- Definition of social media marketing
- The characteristics of effective social media content, e.g.,entertaining, aspirational, actionable, shared community, incentives
- Types of business marketing content, e.g.,blog, vlog, video, infographic, podcast etc.
- The challenges of employing social media, e.g. content creation, cost, selecting the right platform, relevance for target audience, managing consumer expectations
- Format requirements of current social media, e.g. Facebook, YouTube, Twitter, Instagram, TikTok, WhatsApp
- Implications of the differing formats of social media platform for content creation
- Ways to review the effectiveness of content, e.g., revenue, loyalty/retention, sales leads, conversion rate, number of visitors, page views, bounce rate, social media analytics etc.

### LO4 Understand online marketing data and legal regulation

- The purposes of gathering data, e.g., building a customer database of existing and potential customers, achieve marketing efficiencies via effective use of resources, to establish insights related to customer purchase habits, buying behaviours, product/service preferences etc.
- Types of data, e.g., demographic, firmographic, technographic, chronographic, intent, quantitative, qualitative
- Ways in which data can be gathered, e.g., public sources (open websites, social media, Google analytics), private sources (email subscribers, organisation’s CRM, website analytics), data mining
- Data Protection legislation. All countries have their own legislation. In the UK, it is the 2018 Data Protection Act, which implemented the General Data Protection Regulation (GDPR). In the UAE it is the Federal Data Protection Law 2021. In Sri Lanka, the Personal Data Protection Bill 2021

Suggested Resources	
<b>Online Marketing</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"> <li>• Hemann, C., (2013) Digital Marketing Analytics: Making Sense of Consumer Data in a Digital World, Que Biz-Tech</li> <li>• Digital marketing for Dummies. Ryan Deiss and Russ Henneberry</li> <li>• Digital Marketing (2021). Danny Star</li> <li>• The New Rules of Marketing (2015) Meerman</li> </ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"> <li>• <a href="https://www.tutor2u.net/business/blog/the-difficulties-of-digital-marketing-in-2018">https://www.tutor2u.net/business/blog/the-difficulties-of-digital-marketing-in-2018</a></li> <li>• <a href="http://www.marketing-made-simple.com">www.marketing-made-simple.com</a></li> </ul>

**Unit 11 Online Marketing - Supporting information**

**Opportunities for Synoptic Teaching and Learning**

Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.

<b>Learning Outcome</b>	<b>Teaching and learning links to other unit LO/AC</b>
LO1 Understand the use of websites and emails for marketing	Unit 3 Business Communication LO1 Understand the principles of effective internal and external communication AC1.1 Explain channels of communication used a) internally and b) externally in organisations LO3 Understand how organisations communicate with customers AC3.1 Analyse key factors organisations need to consider when communicating with customers AC3.2 Analyse systems for communication with customers in organisations  Unit 8 Principles of Marketing and Sales LO3 Understand pricing and promotional strategies AC 3.2 Explain different approaches to promoting products and services
LO3 Create business content for a social media platform	Unit 3 Business Communication LO1 Understand the principles of effective internal and external communication AC1.1 Explain channels of communication used a) internally and b) externally in organisations LO2 Understand how organisations communicate with customers AC2.1 Participate in an activity to demonstrate oral communication in a formal situation, using technology and other appropriate aids to present complex business information effectively
LO4 Understand online marketing data and legal regulation	Unit 5 Market Research LO2 Understand how legislation and ethics impact on market research activity AC2.2 Explain how legislation can impact market research activities  Unit 8 Principles of Marketing and Sales LO5 Understand the legislation and ethics of marketing AC 5.1 Explain key legislation relating to marketing activity in a selected country

**Opportunities for Synoptic Assessment**

Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit, AC 2D1 offers opportunity to assess learning across LO1 and LO2

**Opportunities for Skills Development within this unit**

<b>Employability Skills</b>	<b>Study Skills</b>
<b>Working Independently</b> - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks <b>(LO1, LO2, LO3, LO4)</b>	<b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO2, LO4)</b>  <b>Reading Skills</b> - Identifying different reading materials, e.g. books, articles, online materials <b>(LO1, LO2, LO3, LO4)</b>

<p><b>Communication Skills</b> - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation &amp; grammar (SPAG) <b>(LO2, LO4)</b></p> <p><b>Problem-solving</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information <b>(LO3)</b></p> <p><b>Digital Skills</b> - Handling and judging the reliability of information, using appropriate digital devices, e.g. computers, laptops, and relevant applications, software, systems and getting online <b>(LO1, LO2, LO3, LO4)</b></p>	<p><b>Thinking Skills</b> - Using critical thinking skills, e.g. reading all information, identifying and interpreting others' positions, arguments and conclusions, weighing up opposing arguments, drawing conclusions <b>(LO1, LO3, LO4)</b></p>
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<b>Unit 12 International Business</b>			
<b>Unit aims</b>	Learners will develop knowledge and understanding of how businesses trade internationally, the benefits and costs to a business of trading internationally and the barriers to trading internationally.		
<b>Unit level</b>	3		
<b>Unit code</b>	L/650/4828		
<b>GLH</b>	90		
<b>Credit value</b>	15		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners must base their answers on one specified country with which they are familiar. Learners will also need to agree with their tutors appropriate organisations on which to base their study. SMEs are recommended as larger organisations are often too complex and accessing the information required can be challenging, although the organisations should trade internationally</p> <p>Learner work should be illustrated with real business examples and should demonstrate substantial coverage of the unit indicative content.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the nature of international trade	1.1 Explain the key elements required for international trade to benefit both parties 1.2 Analyse the implications to a named organisation of trading internationally 1.3 Explain trade deficits and surpluses	1M1 Analyse the composition of major imports and exports for a named country	1D1 Analyse the implications of a named country's balance of trade in recent years
2. Understand the impact of exchange rates on a business	2.1 Analyse how exchange rate fluctuations affect the price of imports and exports for a named organisation 2.2 Explain how an organisation can		

	reduce the risk of exchange rate fluctuations		
3. Understand the nature of trade agreements between countries	3.1 Describe two international trade agreements 3.2 Explain the role of the World Trade Organisation	<b>LO1 and LO3</b>  3M1 Analyse the benefits of two international trade agreements for a named country	
4. Understand barriers to trading internationally	4.1 Explain how and why governments seek to restrict trade between countries 4.2 Explain the operational barriers to trading internationally for a named organisation		<b>LO1, LO2, LO3 and LO4</b>  4D1 Evaluate the challenge to a specific organisation of trading internationally in a named country

## Indicative Content

### LO1 Understand the nature of international trade

- The key elements required for international trade, absolute and comparative advantages, e.g. natural resources, technology, costs, demand for a product or service, government policy, economies of scale
- The costs and benefits of trading internationally for an organisation, e.g. lower costs of raw materials, larger potential sales market, increased operational costs
- The value of imports and exports for a country in relation to GDP
- The composition of imports and exports by economic sector
- Visible and invisible imports and exports
- The balance of trade, deficits and surpluses
- Implications of trade deficits and surpluses on the domestic economy, e.g. impact on interest rates, exchange rates, domestic prices, employment, economic growth
- Global supply chains; implications of disruption to chains

### LO2 Understand the impact of exchange rates on a business

- The impact of a rising or falling exchange rate on the price of imports and exports
- Value of a currency – “strong or weak”
- The impact of exchange rate fluctuations on business costs and revenue
- Measures to reduce exchange rate change uncertainty, e.g.: forward currency market, foreign currency portfolio, hedged exchange funds, using a third currency.

### LO3 Understand the nature of trade agreements between countries

- The roles of the World Trade Organisation: e.g. overseeing the operation of global trade rules, being a forum for negotiating trade agreements, settling trade disputes and supporting developing countries
- Examples of trade agreements - bilateral and multi-lateral agreements
- The benefits and costs of trade agreements to an organisation: e.g. reduced costs of imports, opening up of new export markets, increased competition
- The benefits and costs of trade agreements to a country: e.g. reduced tariffs on imports and exports, opening up of export markets, greater competition in the domestic market

### LO4 Understand barriers to trading internationally

- The reasons why external barriers to trade are imposed: e.g. protection of domestic industry, protection of domestic economy and currency, geopolitics, trade agreements
- Externally imposed barriers to businesses operating internationally, e.g.: tariffs, import quotas, export licences.
- Operational barriers to businesses working internationally: e.g. costs, legal, transportation costs, communication and language, marketing, cultural factors, time zones
- The impact of external and operational barriers to trade on an organisation: e.g. changes to domestic output, loss of potential markets, supply chains and cost of raw materials, quality of raw materials

Suggested Resources	
<b>International Trade</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"><li>• Hamilton, L., (2018) The International Business Environment, Oxford University Press</li><li>• Morrison, J., (2020) The Global Business Environment: Towards Sustainability?, Bloomsbury Publishing</li><li>• Wetherly, P., (2018) The Business Environment: Themes and Issues in a Globalizing World, Oxford University Press</li></ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"><li>• <a href="https://www.tutor2u.net/business/blog/is-free-trade-good-or-bad">https://www.tutor2u.net/business/blog/is-free-trade-good-or-bad</a></li><li>• <a href="https://www.tutor2u.net/business/reference/open-trade-and-protectionism">https://www.tutor2u.net/business/reference/open-trade-and-protectionism</a></li></ul>

## Unit 12 International Business - Supporting information

### Opportunities for Synoptic Teaching and Learning

Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.

#### Learning Outcome

#### Teaching and learning links to other unit LO/AC

LO1 Understand the nature of international trade.

LO2 Understand the impact of exchange rates on a business.

LO3 Understand the nature of trade agreements between countries

LO4 Understand barriers to trading internationally

Unit 1 The Business Environment LO3 Conduct a STEEPLE analysis and understand the impact of external factors on organisations  
AC 3.1 Conduct a STEEPLE analysis and understand the impact of external factors on organisations

LO4 Understand barriers to trading internationally

Unit 3 Business Communication LO1 Understand the principles of effective internal and external communication AC 1.1 Explain channels of communication used a) internally and b) externally in organisations  
AC 1.2 Explain barriers to communication for organisations  
LO3 Understand how organisations communicate with customers AC 3.1 Analyse key factors organisations need to consider when communicating with customers

### Opportunities for Synoptic Assessment

Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit, 3M1 offers opportunity to assess learning across LO1 and LO3, and 4D1 offers opportunity to assess learning across LO1, LO2, LO3 and LO4

### Opportunities for Skills Development within this unit

#### Employability Skills

**Working Independently** - Using own initiative, self-organisation, maintaining motivation/focus, managing tasks (LO1, LO2, LO3, LO4)

**Communication Skills** - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation & grammar (SPAG) (LO1, LO2, LO3, LO4)

#### Study Skills

**Using sources of information** - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources (LO1, LO2, LO3, LO4)

**Reading Skills** - Identifying different reading materials, e.g. books, articles, online materials (LO4)

**Thinking Skills** - Using critical thinking skills, e.g. reading all information, identifying and interpreting others' positions, arguments and conclusions,

**Problem-solving** - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information **(LO2)**

weighing up opposing arguments, drawing conclusions **(LO2)**

<b>Unit 13 Project Management</b>			
<b>Unit aims</b>	Learners will develop knowledge and understanding of project management. They will develop project management skills through the planning of a business-related project		
<b>Unit level</b>	3		
<b>Unit code</b>	M/650/4829		
<b>GLH</b>	90		
<b>Credit value</b>	15		
<b>Unit grading structure</b>	Pass, Merit and Distinction		
<b>Assessment guidance</b>	<p>In order to achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners will need to agree with tutors appropriate projects on which to base their study. The project could be undertaken as a group work exercise between the learner and other learners on the programme/related programmes or it could be a project that the learner undertakes at work or as a part of some outside activity, e.g. for a charity or sports club. Learners will need to demonstrate they can independently achieve LO1. For LO2, LO3 and LO4, learners will need to demonstrate evidence of planning, implementing and managing part or all of a project.</p> <p>Learner work should demonstrate substantial coverage of the unit indicative content.</p> <p>This optional unit is potentially synoptic in nature as it draws on knowledge, understanding and skills gained across other units. If the unit is chosen, delivery at the end of the learner's Diploma/Extended Diploma in Business and Management programme is recommended.</p>		
<b>Learning outcomes</b>	<b>Assessment criteria</b>		
The learner will demonstrate that they:	The learner can:		
	<b>Pass</b>	<b>Merit</b>	<b>Distinction</b>
1. Understand the principles of project management	1.1 Explain the principles and process of project management 1.2 Outline the skills and qualities necessary to effectively manage a project		
2. Can plan a project	2.1 Use a range of project planning		2D1 Analyse the importance of project planning

	<p>tools to plan a specific project</p> <p>2.2 Outline how the resources needed for a specific project will be procured</p> <p>2.3 Present the project plan in an appropriate format</p>	<b>LO2 and LO3</b>	including contingency planning
3. Can implement a project	3.1 Implement a project using the plan produced in AC 2.3		3M1 Analyse the challenges when planning and implementing the project
4. Can review personal role and skills in managing a project	<p>4.1 Obtain feedback on personal role in project management including skills of:</p> <ul style="list-style-type: none"> <li>a) Time management</li> <li>b) Liaising with others</li> <li>c) Planning the project</li> <li>d) Implementing the project</li> </ul> <p>4.2 Obtain feedback on the project outcome</p> <p>4.3 Review personal project management skills using feedback obtained</p>	4M1 Produce a development plan to improve personal project management skills	

## Indicative Content

### LO1 Understand the principles of project management

- Principles of project management:
  - Aligning with organisational vision, mission and objectives
  - Setting project aims and objectives
  - Agreeing expected project outcomes
  - Having a strategy for initiation and execution
  - Project team roles and responsibilities
  - Risk assessment and health and safety procedures
  - Monitoring and measuring progress
  - Accountability
- Five steps for project management:
  - Initiation
  - Planning
  - Implementation
  - Monitoring and controlling
  - Closure
- Project management skills:
  - Leadership
  - Decision making
  - Time management
  - Technical expertise
  - Meeting deadlines
  - Ability to delegate
  - Problem solving
  - Negotiation
  - Communication skills
  - Liaising with others
  - Planning skills
- Project management qualities:
  - Enthusiasm
  - Inspiring a shared vision
  - Organised
  - Patience
  - Determination
  - Able to cope with pressure
  - Integrity
  - Empathy

## **LO2 Plan a project**

- Planning process
- Importance of effective planning
- Contingency planning
- Funding a project: loans, grants, personal funds, sponsorship
- Project budgeting
- Simple investment appraisal – payback, ARR
- Identifying project resources
- Planning tools, e.g.:
  - Critical Path Analysis (CPA)
  - Gantt charts
  - Project Evaluation and Review Technique (PERT)
  - Work Breakdown Structure (WBS)
  - Agile Project Management
  - Waterfall
  - Kanban
- Use of technology in project planning
- Health and safety
- Risk assessments
- Publicity and advertising
- Procurement of resources, e.g. finance, venue, equipment, staff, refreshments, publicity
- Presenting project plans appropriately to different audiences

## **LO3 Implement a project**

- Implementation of a project according to the project plan
- Recording implementation of project, e.g. use of project log and activity tracking
- Monitoring a project
- Controlling a project
- Problem solving
- Conflict management
- Crisis management

## **LO4 Review personal role and skills in managing a project**

- Obtaining feedback from peers and project stakeholders on personal project management
- Review of project success against aims and objectives
- Skills review to include:
  - Time management
  - Liaising with other people when managing a project
  - Project planning
  - Implementing a project
  - Identifying strengths and weaknesses
- Skills development planning
- Preparing a skills development plan

<b>Suggested Resources</b>	
<b>Unit 13 Project Management</b>	<p><b>Textbooks</b></p> <ul style="list-style-type: none"><li>• Portny J. and S., 2022, Project Management for Dummies, 6<sup>th</sup> Edition, For Dummies</li><li>• Newton. R., 2016, Project Management Step by Step: How to Plan and Manage a Highly Successful Project, 2nd Edition, Pearson</li><li>• Ferraro, J., 2012, Project Management for Non-Project Managers, AMACOM</li></ul> <p><b>Online Resources</b></p> <ul style="list-style-type: none"><li>• <a href="https://www.teamwork.com/project-management-guide/project-management-methodologies/">https://www.teamwork.com/project-management-guide/project-management-methodologies/</a></li><li>• <a href="https://www.youtube.com/watch?v=Jk-JwtScIIw">https://www.youtube.com/watch?v=Jk-JwtScIIw</a></li></ul>

## Unit 13 Project Management - Supporting information

### Opportunities for Synoptic Teaching and Learning

Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.

#### Learning Outcome

#### Teaching and learning links to other unit LO/AC

LO1 Understand the principles of project management

Unit 7 Leading and Managing People LO1 Understand the key elements of leadership and management AC 1.2 Compare the key skills and qualities of effective leaders and managers

LO2 Plan a project

Unit 2 How Businesses and Organisations Work LO4 Understand the resources required by organisations AC 4.1 Importance of human resources and AC 4.2 physical, technological and financial resources

Unit 5 Market Research LO3 Select and plan market research AC 3.2 Prepare a market research plan

Unit 6 Introduction to Financial Controls in Business LO2 Understand the importance of managing budgets

Unit 8 Principles of Marketing and Sales LO3 Understand pricing and promotional strategies AC 3D1 Develop a promotional plan for a product or service

Unit 11 Online Marketing LO3 Create business content for a social media platform AC 3.2 Create sample business content for a social media platform

LO3 Implement a project

Unit 5 Market Research LO4 Undertake research and analyse results for the chosen market research AC 4.1 Undertake market research in line with the market research plan

LO4 Review personal role and skills in managing a project

Other units within the qualification require learners to review personal skills in a particular context e.g.:

Unit 3 Business Communication LO4, reviewing communication skills,

Unit 4 Collaborative Working LO4, reviewing employability skills

Unit 5 Market Research LO6, reviewing research skills

Unit 7 Leading and Managing People, LO5 Review own leadership and management skills

### Opportunities for Synoptic Assessment

Some of the Merit and Distinction criteria require knowledge from one or more of the LOs. In this unit, AC 3M1 Analyse the challenges when planning and implementing the project, offers opportunity to assess understanding across LO2 and LO3

In addition, AC 4D1 Evaluate the success of personal project management, offers opportunity to assess understanding across LO3 and LO4

The unit is also potentially synoptic if the project idea is based on knowledge, understanding and skills from other units, and the unit is taken at the end of the learner's Diploma/Extended Diploma in Business and Management programme.

<b>Opportunities for Skills Development within this unit</b>	
<b>Employability Skills</b>	<b>Study Skills</b>
<p><b>Communication Skills</b> - Written communication, e.g. appropriate formats, style and tone, spelling, punctuation &amp; grammar (SPAG) <b>(LO1, LO2, LO4)</b></p> <p><b>Problem-solving</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information <b>(LO1, LO2)</b> defining challenges and issues, determining and assessing solutions, planning and implementing solutions <b>(LO2, LO3)</b></p> <p><b>Teamwork</b> - Planning teamwork with colleagues Team members having specific roles, working and respecting differences between people (based on sex/gender, race, disability, age etc.), Allocating tasks based on individual capabilities <b>(LO2)</b>, Taking responsibility for timekeeping and outcomes, meeting deadlines and ensuring quality, Dealing with differences of opinion and conflict <b>(LO3)</b>, Maximising feedback and participation for team members <b>(LO4)</b></p>	<p><b>Using sources of information</b> - Accessing information, e.g. choosing current, sufficient, relevant and reliable sources <b>(LO1, LO2, LO4)</b></p> <p><b>Thinking Skills</b> - Using analytical skills, e.g. research skills, handling information, consulting multiple sources <b>(LO1, LO2, LO4)</b></p> <p><b>Thinking Skills</b> - Reflective thinking, e.g. ensuring we allow time and space to listen to and read feedback so that we become more self-aware and can improve <b>(LO4)</b></p> <p><b>Digital Skills</b> - Handling and judging the reliability of information <b>(LO1, LO2, LO4)</b></p> <p><b>Time management</b> - Planning, e.g. organising time around commitments <b>(LO4)</b></p>