QUALIFICATION HANDBOOK

City & Guilds Level 3 NVQ Certificate/ Diploma in Marketing (7712-03/04)

March 2022 Version 1.1

City&
Guilds

Qualification at a glance

Subject area	Marketing
City & Guilds number	7712
Age group approved	16+
Entry requirements	There are no entry requirements
Assessment	Portfolio of evidence.
Automatic approval	Available
Support materials	Qualification handbook
Registration/ certification dates	See Online Catalogue/Walled Garden for last dates

Title and level	City & Guilds number	Accreditation number
Level 3 NVQ Certificate in Marketing	7712-03	600/0935/4
Level 3 NVQ Diploma in Marketing	7712-04	600/0926/3

Version and date	Change detail	Section
V1.0 March 2011	Launch	
V1.1 March 2022	GLH and TQT clarified and highlighted	Throughout

Contents

1   Introduction

This document tells you what you need to do to deliver the qualifications:

Area	Description
Who are the qualifications for?	For learners who work or want to work in the marketing sector. This qualification is for those working in any of the following roles or roles similar to these: • Marketing Executive • Marketing Manager • Account Manager/Executive
What do the qualifications cover?	They allow learners to learn, develop and practise the skills required for employment and/or career progression in the marketing sector.
Are the qualifications part of a framework or initiative?	The Level 3 NVQ Diploma in Marketing (7712-04) serves as a competence qualification in the Marketing Advanced Apprenticeship framework.
Who did we develop the qualifications with?	They were developed in association with the Council for Administration.
What opportunities for progression are there?	They allow candidates to progress into employment or to the following City & Guilds qualifications: • Level 2/3 NVQ Diploma in Sales (6801-01/02/03/04) • Level 2/3 Certificate in Principles of Marketing (7711-02/03) • Level 2/3 NVQ Certificate/Diploma in Business and Administration (4428-02/03) • Level 2/3 Certificate in Principles of Business and Administration (4475-02/03)

Structure

Qualification	Min. no. of credits overall	Group A Mandatory (credits)	Group B Optional (credits)	Group C Optional (credits)
Level 3 NVQ Certificate in Marketing	**25**	13	6 (min)	6 (max)
	(min of 21 credits must be at level 3 or above)			
Level 3 NVQ Diploma in Marketing	**37**	13	12 (min)	12 (max), of which a max of 4 can be at level 2
	(min of 31 credits must be at level 3 or above)			

NB: Candidates do **not** have to take any units from optional group C.

7712 Level 3 NVQ Certificate/Diploma in Marketing Units

*Excluded combination – indicated unit(s) cannot be taken together within any one qualification

Unit Group Key:

A – Mandatory	B – Optional Group B	C – Optional Group C

City & Guilds unit number	Ofqual unit accreditation number	Unit title	Level	Credit	GLH	Group	*Excluded combination
301	Y/502/9927	Analyse competitor activity	3	3	3	A	
302	R/502/9957	Contribute to the development of a marketing plan	3	3	12	A	
303	F/601/2520	Evaluate and improve own performance in a business environment	3	3	22	A	
304	R/601/2523	Work with other people in a business environment	3	4	12	A	
206	R/502/9926	Use digital and social media in marketing campaigns	2	2	7	B	
305	H/502/9929	Conduct market research	3	6	10	B	
306	H/502/9932	Evaluate market research data	3	3	12	B	
307	T/502/9952	Maintain a portfolio of products and/or services	3	3	17	B	
308	F/502/9954	Design marketing promotions	3	3	10	B	
309	D/502/9959	Implement a marketing plan	3	4	5	B	

City & Guilds unit number	Ofqual unit accreditation number	Unit title	Level	Credit	GLH	Group	*Excluded combination
310	Y/502/9961	Develop an advertising campaign	3	3	10	B	
311	D/502/9962	Specify the design requirements for marketing databases	3	3	12	B	
312	K/502/9964	Manage outsourced marketing supplier relationships	3	4	12	B	
313	M/502/9965	Use digital technology for marketing purposes	3	5	15	B	
330	R/502/9960	Evaluate the effectiveness of a marketing plan	3	4	10	B	
401	M/502/9934	Contribute to the preparation of a marketing strategy	4	6	25	B	
402	A/502/9936	Contribute to the development pf new products and/or services	4	4	16	B	
210	F/502/4396	Bespoke software	2	3	20	C	328
211	M/502/4622	Presentation software	2	4	30	C	324
212	R/502/4631	Website software	2	4	30	C	327
214	F/502/4379	Using collaborative technologies	2	4	30	C	326
215	F/502/4625	Spreadsheet software	2	4	30	C	325
314	J/901/2549	Contribute to running a project	3	5	30	C	
315	A/601/2547	Contribute to innovation in a business environment	3	4	30	C	
316	M/601/2528	Develop a presentation	3	3	15	C	
317	T/601/2529	Deliver a presentation	3	3	15	C	
318	J/601/2552	Agree a budget	3	4	25	C	
319	Y/601/2524	Contribute to decision-making in a business environment	3	3	12	C	406
320	D/601/2525	Negotiate in a business environment	3	5	20	C	
321	R/601/2540	Plan and organise an event	3	4	28	C	322
322	Y/601/2541	Co-ordinate an event	3	4	30	C	321
323	Y/600/9669	Plan, allocate and monitor work of a team	3	5	25	C	
324	T/502/4623	Presentation software	3	6	45	C	211
325	J/502/4626	Spreadsheet software	3	6	45	C	215
326	T/502/4380	Using collaborative technologies	3	6	45	C	214
327	Y/502/4632	Website software	3	5	40	C	212
328	J/502/4397	Bespoke software	3	4	30	C	210

City & Guilds unit number	Ofqual unit accreditation number	Unit title	Level	Credit	GLH	Group	*Excluded combination
403	K/600/9661	Develop working relationships with colleagues and stakeholders	4	4	20	C	
404	T/601/2580	Manage budgets	4	5	29	C	
405	F/601/2565	Prepare specifications for contracts	4	5	30	C	
406	H/601/2560	Make decisions in a business environment	4	4	24	C	319
407	J/601/2566	Chair meetings	4	4	16	C	

Total Qualification Time

Total Qualification Time (TQT) is the number of notional hours which represents an estimateof the total amount of time that could reasonably be expected for a learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of a qualification.

TQT is comprised of the following two elements:
1) The number of hours which an awarding organisation has assigned to a qualification forGuided Learning, and

2) 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

Title and level	GLH	TQT
City & Guilds Level 2 NVQ Certificate in Marketing (7712-02)	115	370

2   Centre requirements

Approval

If your Centre is approved to offer the qualification Level 3 NVQ in Marketing (6763-03), you will have automatic approval for the new Level 3 NVQ Certificate/Diploma in Marketing (7712-03/04).

To offer these qualifications, new centres will need to gain both centre and qualification approval. Please refer to the *Centre guide* and *Providing City & Guilds Qualifications* for further information.

Centre staff should familiarise themselves with the structure, content and assessment requirements of the qualifications before designing a course programme.

Resource requirements

Centre staffing

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- be occupationally competent to make Marketing Assessment judgements about the level and scope of individual candidate performance at work or in RWEs; and, occupationally competent to make assessment judgements about the quality of assessment and the assessment process
- be occupationally knowledgeable in the area(s) for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- have credible experience of providing training.

For imported units please refer to the relevant Assessment Strategy from the standard setting body/sector skills council:
e-skills UK: **www.e-skills.com**

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but cannot internally verify their own assessments.

Assessors and internal verifiers

a) Centre staff should hold, or be working towards, the relevant D/A/V/T or equivalent in Scotland for their role in delivering, assessing and verifying these qualifications

or

b) A trainer, supervisor or manager, employed by an organisation must either:

1. hold or be working towards, the relevant D/A/V/T or equivalent in Scotland for their role in delivering, assessing and verifying these qualifications

or

2. seek guidance and approval from City & Guilds to demonstrate that the

   - organisation has appropriate processes in place to facilitate assessment, moderation or verification functions

   - trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based.

For imported units please refer to the Assessment strategy from the relevant sector skills council/standards setting body.

Continuing professional development (CPD)

Centres must support their staff to ensure that they have current knowledge of the occupational area, that delivery, mentoring, training, assessment and verification is in line with best practice, and that it takes account of any national or legislative developments.

Candidate entry requirements

There are no formal entry requirements for learners undertaking these qualifications. However, centres must ensure that learners have the potential and opportunity to gain the qualification(s) successfully.

To be awarded an NVQ in Marketing, learners must demonstrate that they are able to perform the job or an appropriate task competently. Competence may be demonstrated in the private sector, not-for-profit sector or public sector. Learners may be employed as full-time, part-time, paid or voluntary members of staff.

The assessment of all units at any level of a Marketing NVQ or competence-based qualification, '… may be based on either candidate performance at work or through RWE, as necessary.' [1]

As part of the assessment for this qualification, learners must have access to a work or realistic work environment (RWE).

Realistic work environments

Where the learner is subjected to a work environment and is producing performance evidence subject to all of the following conditions:
- time pressures
- work problems
- interruptions
- accountabilities
- office environment
- tools to do the job.

eg a candidate in a model or virtual office.

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[1] See, CfA Assessment Strategy 2011, Marketing NOS, January 2011.

External verifiers will need to approve RWEs on an individual basis before any assessment can begin. Authenticity is essential and approval needs to be endorsed on an annual basis by the external verifier.

Simulation

If a unit or part of a unit at any level is simulated, it must be undertaken in a RWE.

The overarching principle to be applied to units identified as suitable for simulation is that it should only be undertaken in a minority of cases where

- there is a high risk to the security or safety of the learner, individuals, key people in their lives and others
- the opportunity to present evidence from work-based practice happens infrequently and therefore insisting that candidates wait for such an occurrence would be unreasonable or create blockages in the assessment system and might carry the risk of de-motivating learners
- there would otherwise be a breach of confidentiality or privacy.

An example of a simulated task is one that is not going to be used by a third party but meets all the rigour of an RWE ie where the learner is subjected to work timelines, prioritising, interruptions of a working environment etc.

For imported units please refer to the Assessment strategy from the relevant sector skills council/standards setting body.

Age restrictions

City & Guilds cannot accept any registrations for candidates under 16 as these qualifications are not approved for under 16s.

3   Delivering the qualification

Initial assessment and induction

An initial assessment of each learner should be made before the start of their programme to identify:

- if the learner has any specific training needs,
- support and guidance they may need when working towards their qualifications.
- any units they have already completed, or credit they have accumulated which is relevant to the qualifications.
- the appropriate type and level of qualification.

We recommend that centres provide an induction programme so the learner fully understands the requirements of the qualifications, their responsibilities as a learner, and the responsibilities of the centre. This information can be recorded on a learning contract.

Recording documents

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at: **www.cityandguilds.com/eportfolios**.

City & Guilds has developed a set of *Recording forms* including examples of completed forms, for new and existing centres to use as appropriate.

Recording forms are available on the City & Guilds website.

Although new centres are expected to use these forms, centres may devise or customise alternative forms, which must be approved for use by the external verifier, before they are used by candidates and assessors at the centre.

Amendable (MS Word) versions of the forms are available on the City & Guilds website.

4 Assessment

Assessment of the qualification

Candidates must:

- have a completed portfolio of evidence across all the units selected; this can be via a number of formats eg e-portfolio, recording forms etc.

Time constraints

The following must be applied to the assessment of this qualification:

- Candidates must finish their qualification within the candidate's period of registration

Recognition of prior learning (RPL)

Recognition of prior learning means using a person's previous experience or qualifications which have already been achieved to contribute to a new qualification.

RPL for Marketing units may be evidenced from a range of activities, using valid assessment methods that meet the requirements of the assessment criteria of a unit. Evidence in support of RPL must be authentic, current, valid, relevant and sufficient.

Please refer to the relevant Assessment Strategy for guidance on RPL for imported units.

5   Units

Availability of units

The following units can also be obtained from The Register of Regulated Qualifications: **http://register.ofqual.gov.uk/Unit**

Structure of units

These units each have the following:
- City & Guilds reference number
- unit accreditation number (UAN)
- title
- level
- credit value
- unit aim
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- information on assessment
- learning outcomes which are comprised of a number of assessment criteria

Summary of units

Unit number	Unit title	Credits	Unit number (UAN)
206	Use digital and social media in marketing campaigns	2	R/502/9926
210	Bespoke software	3	F/502/4396
211	Presentation software	4	M/502/4622
212	Website software	4	R/502/4631
214	Using collaborative technologies	4	F/502/4379
215	Spreadsheet software	4	F/502/4625
301	Analyse competitor activity	3	Y/502/9927
302	Contribute to the development of a marketing plan	3	R/502/9957
303	Evaluate and improve own performance in a business environment	3	F/601/2520
304	Work with other people in a business environment	4	R/601/2523
305	Conduct market research	6	H/502/9929
306	Evaluate market research data	3	H/502/9932

Unit number	Unit title	Credits	Unit number (UAN)
307	Maintain a portfolio of products and/or services	3	T/502/9952
308	Design marketing promotions	3	F/502/9954
309	Implement a marketing plan	4	D/502/9959
310	Develop an advertising campaign	3	Y/502/9961
311	Specify the design requirement for marketing databases	3	D/502/9962
312	Manage outsourced marketing supplier relationships	4	K/502/9964
313	Use digital technology for marketing purposes	5	M/502/9965
314	Contribute to running a project	5	J/601/2549
315	Contribute to innovation in a business environment	4	A/601/2547
316	Develop a presentation	3	M/601/2528
317	Deliver a presentation	3	T/601/2529
318	Agree a budget	4	J/601/2552
319	Contribute to decision-making in a business environment	3	Y/601/2524
320	Negotiate in a business environment	5	D/601/2525
321	Plan and organise an event	4	R/601/2540
322	Co-ordinate an event	4	Y/601/2541
323	Plan, allocate and monitor work of a team	5	Y/600/9669
324	Presentation software	6	T/502/4623
325	Spreadsheet software	6	J/502/4626
326	Using collaborative technologies	6	T/502/4380
327	Website software	5	Y/502/4632
328	Bespoke software	4	J/502/4397
330	Evaluate the effectiveness of a marketing plan	4	R/502/9960
401	Contribute to the preparation of a marketing strategy	6	M/502/9934
402	Contribute to the development of new products and/or services	4	A/502/9936
403	Develop working relationships with colleagues and stakeholders	4	K/600/9661
404	Manage budgets	5	T/601/2580
405	Prepare specifications for contracts	5	F/601/2565
406	Make decisions in a business environment	4	H/601/2560
407	Chair meetings	4	J/601/2566

Unit 206   Use digital and social media in marketing campaigns

UAN:	R/502/9926
Level:	Level 2
Credit value:	2
GLH:	7
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 4.3.8 Market to target customers using digital/electronic media
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns understanding planning requirements for the use of digital and social media and market to target customers using digital and social media

Learning outcome	The learner will:
1. Understand planning requirements for the use of digital and social media	

Assessment criteria
The learner can: 1.1 Describe the importance of the objectives and budget for digital and social media marketing aligning with the marketing plan 1.2 Describe how to identify the nature and location of target customers 1.3 Describe sources of information about the nature and location of target customer groups 1.4 Explain the implications of retention and acquisition programmes as they affect the choice of digital/social media 1.5 Explain how to reach target customers in accordance with the plan 1.6 Explain the requirements of a data collection and reporting system that is capable of capturing the information required by the plan 1.7 Explain the importance of agreeing the message that conveys the marketing proposition

Learning outcome	The learner will:
2. Be able to market to target customers using digital and social media	
Assessment criteria	
The learner can: 2.1 Ensure marketing messages are distributed in accordance with the plan 2.2 Ensure that digital/social media marketing is conducted in accordance with legal, regulatory and industry requirements and standards 2.3 Explain how to address problems in accordance with the plan	

Unit 210   Bespoke software

UAN:	F/502/4396
Level:	Level 2
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to the Level 2 National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by E-Skills the Sector Skills Council for Business and Information Technology
Aim:	This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

Learning outcome	The learner will:
1. Input and combine information using bespoke applications	
Assessment criteria	

The learner can:
1.1 Input relevant information accurately so that it is ready for processing
1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software
1.3 Respond appropriately to data entry error messages

Learning outcome	The learner will:
2. Use appropriate structures to organise and retrieve information efficiently	
Assessment criteria	

The learner can:

2.1 Describe what functions to apply to structure and layout information effectively

2.2 Select and use appropriate structures and/or layouts to organise information

2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available

Learning outcome	The learner will:
3. Use the functions of the software effectively to process and present information	
Assessment criteria	
The learner can:	
3.1 Select and use appropriate tools and techniques to edit, process and format information	
3.2 Check information meets needs, using IT tools and making corrections as necessary	
3.3 Select and use appropriate methods to present information	

Unit 211   Presentation software

UAN:	M/502/4622
Level:	Level 2
Credit value:	4
GLH:	30
Relationship to NOS:	This unit is linked to the Level 2 National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.
Aim:	This unit is about the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing.

Learning outcome	The learner will:
1. Input and combine text and other information within presentation slides	
Assessment criteria	
The learner can:	
1.1 Identify what types of information are required for the presentation	
1.2 Enter text and other information using layouts appropriate to type of information	
1.3 Insert charts and tables into presentation slides	
1.4 Insert images, video or sound to enhance the presentation	
1.5 Identify any constraints which may affect the presentation	
1.6 Organise and combine information of different forms or from different sources for presentations	
1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available	

Learning outcome	The learner will:
2. Use presentation software tools to structure, edit and format slide sequences	
Assessment criteria	
The learner can:	
2.1 Identify what slide structure and themes to use	
2.2 Select, change and use appropriate templates for slides	
2.3 Select and use appropriate techniques to edit slides and	

	presentations to meet needs
2.4	Select and use appropriate techniques to format slides and presentations
2.5	Identify what presentation effects to use to enhance the presentation
2.6	Select and use animation and transition effects appropriately to enhance slide sequences

Learning outcome	The learner will:
3. Prepare slideshow for presentation	
Assessment criteria	
The learner can:	
3.1	Describe how to present slides to meet needs and communicate effectively
3.2	Prepare slideshow for presentation
3.3	Check presentation meets needs, using IT tools and making corrections as necessary
3.4	Identify and respond to any quality problems with presentations to ensure that presentations meet needs

Unit 212   Website software

UAN:	R/502/4631
Level:	Level 2
Credit value:	4
GLH:	30
Relationship to NOS:	This unit is linked to the Level 2 National Occupational Standards for IT users devised by e-Skills UK.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.
Aim:	This is the ability to use a software application designed for planning, designing and building websites.

Learning outcome	The learner will:
1. Create structures and styles for websites	

Assessment criteria

The learner can:

1.1 Describe what website content and layout will be needed for each page

1.2 Plan and create web page templates to layout

1.3 Select and use website features and structures to help the user navigate round web pages within the site

1.4 Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand

1.5 Describe how copyright and other constraints may affect the website

1.6 Describe what access issues may need to be taken into account

1.7 Describe what file types to use for saving content

1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available

Learning outcome	The learner will:
2. Use website software tools to prepare content for websites	

Assessment criteria

The learner can:

2.1 Prepare content for web pages so that it is ready for editing and formatting

2.2 Organise and combine information needed for web pages including across different software

2.3	Select and use appropriate editing and formatting techniques to aid both clarity and navigation
2.4	Select and use appropriate development techniques to link information across pages
2.5	Change the file formats appropriately for content
2.6	Check web pages meet needs, using IT tools and making corrections as necessary

Learning outcome	The learner will:
3. Publish websites	
Assessment criteria	
The learner can:	
3.1 Select and use appropriate testing methods to check that all elements of websites are working as planned	
3.2 Identify any quality problems with websites and how to respond to them	
3.3 Select and use an appropriate programme to upload and publish the website	
3.4 Respond appropriately to problems with multiple page websites	

Unit 214	Using collaborative technologies

UAN:	F/502/4379
Level:	Level 2
Credit value:	4
GLH:	30
Relationship to NOS:	This unit is linked to the Level 2 National Occupational Standards for IT users devised by e-Skills UK.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.
Aim:	This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.

Learning outcome	The learner will:
1. Stay safe and secure when working with collaborative technology	

Assessment criteria

The learner can:
1.1 Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines
1.2 Explain what risks there may be in using collaborative technology and how to keep them to a minimum
1.3 Use appropriate methods to promote trust when working collaboratively
1.4 Carry out appropriate checks on others' online identities and different types of information
1.5 Identify and respond to inappropriate content and behaviour

Learning outcome	The learner will:
2. Plan and set up IT tools and devices for collaborative working	

Assessment criteria

The learner can:
2.1 Describe the purposes for using collaborative technologies
2.2 Describe what outcomes are needed from collaborative working

	and whether or not archiving is required
2.3	Describe the roles, IT tools and facilities needed for collaborative tasks and communication media
2.4	Describe the features, benefits and limitations of different collaborative technology tools and devices
2.5	Describe the compatibility issues in different combinations of collaborative tools and devices
2.6	Select an appropriate combination of IT tools and devices to carry out collaborative tasks
2.7	Connect and configure the combination of IT tools and devices needed for a collaborative task

Learning outcome	The learner will:
3. Prepare collaborative technologies for use	
Assessment criteria	
The learner can:	
3.1 Describe what access rights and issues others may have in using collaborative technologies	
3.2 Assess what permissions are needed for different users and content	
3.3 Set up and use access rights to enable others to access information	
3.4 Set up and use permissions to filter information	
3.5 Adjust settings so that others can access IT tools and devices for collaborative working	
3.6 Select and use different elements to control environments for collaborative technologies	
3.7 Select and join networks and data feeds to manage data to suit collaborative tasks	

Learning outcome	The learner will:
4. Contribute to tasks using collaborative technologies	
Assessment criteria	
The learner can:	
4.1 Describe rules of engagement for using collaborative technologies	
4.2 Enable others to contribute responsibly to collaborative tasks	
4.3 Present relevant and valuable information	
4.4 Moderate the use of collaborative technologies	
4.5 Archive the outcome of collaborative working	
4.6 Assess when there is a problem with collaborative technologies and when to get expert help	
4.7 Respond to problems with collaborative technologies	

Unit 215 Spreadsheet software

UAN:	F/502/4625
Level:	Level 2
Credit value:	4
GLH:	30
Relationship to NOS:	This unit is linked to the Level 2 National Occupational Standards for IT users devised by e-Skills UK.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.
Aim:	This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs.

Learning outcome	The learner will:
1. Use a spreadsheet to enter, edit and organise numerical and other data	

Assessment criteria

The learner can:

1.1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured
1.2 Enter and edit numerical and other data accurately
1.3 Combine and link data across worksheets
1.4 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available

Learning outcome	The learner will:
2. Select and use appropriate formulas and data analysis tools to meet requirements	

Assessment criteria

The learner can:

2.1 Identify which tools and techniques to use to analyse and manipulate data to meet requirements
2.2 Select and use a range of appropriate functions and formulas to meet calculation requirements
2.3 Use a range of tools and techniques to analyse and manipulate data to meet requirements

Learning outcome	The learner will:
3. Select and use tools and techniques to present and format spreadsheet information	
Assessment criteria	
The learner can:	
3.1 Plan how to present and format spreadsheet information effectively to meet needs	
3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets	
3.3 Select and format an appropriate chart or graph type to display selected information	
3.4 Select and use appropriate page layout to present and print spreadsheet information	
3.5 Check information meets needs, using spreadsheet tools and making corrections as necessary	
3.6 Describe how to find errors in spreadsheet formulas	
3.7 Respond appropriately to any problems with spreadsheets	

Unit 301   Analyse competitor activity

UAN:	Y/502/9927
Level:	Level 3
Credit value:	3
GLH:	3
Relationship to NOS:	This unit is linked to the Council for Administration NOS Marketing 1.1.3 Identify and monitor competitors' marketing strategies and activity
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to identify competitor activity and determine the nature of the threat posed by competitors

Learning outcome	The learner will:
1. Be able to identify competitor activity	

Assessment criteria
The learner can:
1.1   Identify organisations competing for the same customers
1.2   Identify potentially threatening competitor activity
1.3   Identify competitors' objectives
1.4   Identify valid sources of information on competitors and their activity
1.5   Explain the advantages and disadvantages of sources of information on competitors and their activity

Learning outcome	The learner will:
2. Be able to determine the nature of the threat posed by competitor activity	

Assessment criteria
The learner can:
2.1   Assess the strengths and weaknesses of competitor activity against agreed criteria
2.2   Assess the strengths and weaknesses of competitors' products and/or services against agreed criteria
2.3   Determine the nature and extent of the possible threat posed by competitor activity and products and/or services

Unit 302	Contribute to the development of a marketing plan

UAN:	R/502/9957
Level:	Level 3
Credit value:	3
GLH:	12
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 4.2.3 Develop a media plan for advertising products/services Marketing 4.3.2 Develop direct marketing plans Marketing 4.5.1 Develop a sales promotion strategy and plan Marketing 4.6.1 Develop a field marketing strategy Marketing 4.6.2 Prepare an outline project plan for a field marketing activity
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to develop a marketing plan

Learning outcome	The learner will:
1. Be able to contribute to the development of a marketing plan	
Assessment criteria	
The learner can: 1.1 Identify the objectives to be achieved by the marketing plan 1.2 Identify the characteristics of the target market(s) 1.3 Evaluate the different methods of achieving the marketing objectives 1.4 Specify methods, actions, resources, timescales, milestones, budget and success criteria 1.5 Use feedback from stakeholders to enhance the marketing plan 1.6 Gain commitment for the marketing plan from stakeholders 1.7 Establish monitoring procedures that are capable of generating evaluative information	

Learning outcome	The learner will:
2. Understand the principles underpinning the development of marketing plans	
Assessment criteria	
The learner can: 2.1 Explain the role of the marketing plan in achieving the overall marketing strategy 2.2 Explain the advantages and disadvantages of different methods of achieving the marketing objectives 2.3 Explain the importance of customer segmentation in the development of a marketing plan 2.4 Explain the roles and responsibilities of other marketing-related functions 2.5 Explain the legal, regulatory, social and ethical issues relevant to marketing plans	

Unit 303	Evaluate and improve own performance in a business environment

UAN:	F/601/2520
Level:	Level 3
Credit value:	3
GLH:	22
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA626.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit is about evaluating and improving your own performance in the workplace

Learning outcome	The learner will:
1. Understand how to evaluate and improve own performance	
Assessment criteria	
The learner can: 1.1 Explain the purpose and benefits of continuously improving own performance in a business environment 1.2 Explain the purpose and value of encouraging and accepting feedback from others 1.3 Describe ways of evaluating own work 1.4 Explain the purpose and benefits of trying out possible improvements to own work 1.5 Evaluate how learning and development can improve own work, benefit organisations, and further own career 1.6 Compare possible career progression routes 1.7 Describe possible development opportunities 1.8 Justify the value of developing a learning plan	

Learning outcome	The learner will:
2. Be able to evaluate and improve own performance using feedback from others	
Assessment criteria	
The learner can: 2.1 Encourage and accept feedback from other people 2.2 Evaluate own work and use feedback from others to identify areas	

	for improvement
2.3	Identify changes in ways of working needed to improve work performance
2.4	Complete work tasks using changed ways of working
2.5	Evaluate work completed and changed ways of working for improvements and effectiveness

Learning outcome	The learner will:
3. Be able to use evaluation of own performance to agree, develop and use a learning plan	
Assessment criteria	
The learner can:	
3.1 Evaluate own performance and identify where further learning and development will improve own work	
3.2 Agree and develop a learning plan to improve own work performance, that meets own needs	
3.3 Follow a learning plan for improvement to own work	
3.4 Review progress against learning plan and make updates for improving own work and further learning	

Unit 304   Work with other people in a business environment

UAN:	R/601/2523
Level:	Level 3
Credit value:	4
GLH:	12
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAG1211.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit is about working with other people, in a way that achieves agreed goals and objectives for the organisation and the team.

Learning outcome	The learner will:
1. Understand how to support an organisation's overall mission and purpose	
Assessment criteria	

The learner can:
1.1   Explain how the organisation works
1.2   Explain the organisation's mission and purpose
1.3   Compare how the organisation works with other different types of organisations
1.4   Explain your main responsibilities, how these fit into the organisation's structure, and how these contribute to achieving your organisation's mission
1.5   Define policies, procedures, systems and values of your organisation relevant to your role
1.6   Describe when it is appropriate to seek guidance from others when unsure about objectives, policies, systems procedures and values

Learning outcome	The learner will:
2. Understand how to work as a team to achieve goals and objectives	
Assessment criteria	

The learner can:
2.1   Explain the purpose and benefits of working with other people to achieve agreed goals and objectives
2.2   Describe situations in which working with others can achieve

	positive results
2.3	Explain the purpose and benefits of sharing work goals and plans when working with others
2.4	Describe situations in which team members might need support
2.5	Explain different ways of providing support to teams
2.6	Explain the purpose and benefits of agreeing quality measures within a team

Learning outcome	The learner will:
3. Understand how to communicate as a team	
Assessment criteria	
The learner can:	
3.1 Explain when it is essential to communicate with the people working within a team	
3.2 Compare and contrast different methods of communication and when to use them	
3.3 Explain the benefits of effective communication within a team	

Learning outcome	The learner will:
4. Understand the contribution of individuals within a team	
Assessment criteria	
The learner can:	
4.1 Explain the purpose and benefits of acknowledging the strengths of others	
4.2 Explain the purpose and benefits of respecting individuals working within a team	

Learning outcome	The learner will:
5. Understand how to deal with problems and disagreements	
Assessment criteria	
The learner can:	
5.1 Explain the types of problems and disagreements that may occur when working with others	
5.2 Evaluate ways of resolving problems and disagreements when working with others	

Learning outcome	The learner will:
6. Understand the purpose of feedback when working as a team	
Assessment criteria	
The learner can:	
6.1 Explain the purpose and benefits of giving and receiving constructive feedback	
6.2 Explain ways of using feedback to improve individual work, the work of others and a team as a whole	

Learning outcome	The learner will:
7. Be able to work in a team to achieve goals and objectives	
Assessment criteria	

The learner can:
7.1 Work in a way that supports your organisation's overall mission
7.2 Follow policies, systems and procedures relevant to your job
7.3 Contribute to improving objectives, policies, systems, procedures and values in a way that is consistent with your role
7.4 Put your organisation's values into practice in all aspects of your work
7.5 Seek guidance from others when not sure about objectives, policies, systems, procedures and values
7.6 Communicate effectively with other people in a team
7.7 Share work goals, priorities and responsibilities with a team
7.8 Agree work objectives and quality measures with a team, to achieve a positive outcome
7.9 Make sure work goals and objectives are achieved in a way makes best use of all abilities in a team
7.10 Provide support to members of a team, as required
7.11 Show respect for individuals in a team
7.12 Make sure the team produces quality work on time

Learning outcome	The learner will:
8. Be able to deal with problems in a team	
Assessment criteria	

The learner can:
8.1 Identify problem(s) or disagreement(s) in a team
8.2 Resolve problem(s) or disagreement(s), referring if required

Learning outcome	The learner will:
9. Be able to share feedback on objectives in a team	
Assessment criteria	

The learner can:
9.1 Share constructive feedback on achievement of objectives with a team
9.2 Receive constructive feedback on own work
9.3 Share feedback on achievement of objectives to identify improvements in own work, and that of the team

Unit 305   Conduct market research

UAN:	H/502/9929
Level:	Level 3
Credit value:	6
GLH:	10
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 1.2.1 Define the need for market research Marketing 1.2.2 Design market research projects Marketing 1.2.3 Implement programmes to collect market research data Marketing 1.2.7 Collect data on the knowledge, attitudes and behaviours of target groups
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to identify the need for market research, design market research projects and manage market research data collection

Learning outcome	The learner will:
1. Be able to identify the need for market research	
Assessment criteria	
The learner can: 1.1 Establish the nature of the marketing issue for which information is needed 1.2 Agree the research budget and timescale 1.3 Agree specific, measurable, realistic and time-bound objectives	

Learning outcome	The learner will:
2. Be able to design market research projects	
Assessment criteria	
The learner can: 2.1 Determine the research method(s) and instrument(s) best suited to obtaining the required information within budget 2.2 Establish the sources of reliable quantitative and qualitative	

	information most likely to yield the required information
2.3	Develop a research project proposal and rationale that addresses the research objectives
2.4	Obtain approval to the specified actions, responsibilities, timescales and budget for the research
2.5	Explain the strengths and limitations of the ranges of proposed research methods
2.6	Explain the use of a sample in designing market research projects
2.7	Explain the importance of validating information

Learning outcome	The learner will:
3. Be able to manage market research data collection	
Assessment criteria	
The learner can:	
3.1	Ensure that the team is briefed on the objectives and data collection tasks
3.2	Ensure that data collection activities are carried out in accordance with the market research plan
3.3	Provide progress and variance reports in accordance with the data collection plan
3.4	Address issues and variances in accordance with the market research plan
3.5	Ensure that the data collection is conducted in accordance with legal, regulatory and industry requirements and standards
3.6	Present the data in the agreed format within the agreed timescale
3.7	Evaluate the effectiveness of the market research data collection against agreed criteria

Unit 306   Evaluate market research data

UAN:	H/502/9932
Level:	Level 3
Credit value:	3
GLH:	12
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 1.3.6 Analyse, interpret and synthesise data and research findings to inform social marketing strategy
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns planning, carrying out and reporting on the evaluation of market research data

Learning outcome	The learner will:
1. Be able to plan the evaluation of market research data	
Assessment criteria	

The learner can:

1.1   Develop an evaluation plan that specifies the purpose, scope, objectives, budget, success criteria, format and timescale
1.2   Identify methods, tools and techniques that are suitable for the evaluation and capable of delivering the required analysis within the timescale and budget
1.3   Obtain the resources needed to carry out the evaluation
1.4   Agree evaluation protocols and procedures with those commissioning research

Learning outcome	The learner will:
2. Be able to evaluate market research data	
Assessment criteria	

The learner can:

2.1   Use agreed methods, tools and techniques in accordance with the evaluation plan
2.2   Validate the data against agreed criteria
2.3   Involve agreed research participants and stakeholders in accordance with the evaluation plan
2.4   Identify issues, trends, themes, linkages and interdependencies from an analysis of the market research data

2.5	Confirm the reliability and validity of the evaluation findings through comparative studies (against historical data and norms)
2.6	Justify evaluation conclusions and recommendations with evidence
2.7	Explain the advantages and disadvantages of a range of analytical methods, tools and techniques
2.8	Explain how to resolve errors, inconsistencies, gaps and anomalies in market research data
2.9	Explain the importance of reliability, validity and statistical confidence to the evaluation

Learning outcome	The learner will:
3. Be able to report on the evaluation of market research data	
Assessment criteria	
The learner can:	
3.1 Record the evaluation findings in a way that facilitates access, data manipulation and reporting	
3.2 Present the evaluation findings in the agreed format within the agreed timescale and budget	
3.3 Explain the implications of the evaluation findings to those commissioning the research in a way that they will understand	

Unit 307   Maintain a portfolio of products and/or services

UAN:	T/502/9952
Level:	Level 3
Credit value:	3
GLH:	17
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 6.1.3 Develop and maintain a portfolio of products/services
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to maintain a portfolio of products and/or services

Learning outcome	The learner will:
1. Be able to develop and maintain a portfolio of products and/or services	
Assessment criteria	

The learner can:

1.1 Identify the market position of each product and/or service
1.2 Assess the market share of each product and/or service
1.3 Forecast likely sales growth and market share growth for each product and/or service
1.4 Establish how changes in sales and market share might be affected by different development strategies
1.5 Prioritise the fit of products and/or services within the overall marketing strategy
1.6 Recommend building market share, holding share, harvesting or divesting of each product and/or service based on an analysis of their likely profitability
1.7 Agree the options, actions and budget for development/maintenance in accordance with the marketing strategy

Learning outcome	The learner will:
2. Understand the principles underpinning portfolio maintenance	
Assessment criteria	
The learner can: 2.1 Explain the importance of portfolio planning to the achievement of the marketing strategy 2.2 Explain the use of techniques for classifying different levels of performance of products and/or services 2.3 Describe the factors to be taken into account when assessing the performance of products and/or services 2.4 Explain the advantages and disadvantages of different forecasting techniques	

Unit 308   Design marketing promotions

UAN:	F/502/9954
Level:	Level 3
Credit value:	3
GLH:	10
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 3.3.2 Design and implement price promotions
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to identify the nature of need for and plan marketing promotions

Learning outcome	The learner will:
1. Be able to identify the nature of need for marketing promotions	
Assessment criteria	

The learner can:

1.1 Justify recommendations on an analysis of sales performance, market factors, buyer and competitor activity

1.2 Determine the affordability of a marketing promotion

1.3 Assess the likely impact of the proposed marketing promotions on demand

1.4 Identify the implications of marketing promotions for other products and/or services

1.5 Develop contingencies to address identified risks associated with marketing promotions

1.6 Set realistic and achievable marketing promotion targets in accordance with the marketing plan

1.7 Describe how to carry out a cost-benefit analysis and establish profitability levels

1.8 Describe the level of returns on investments needed for products and/or services

Learning outcome	The learner will:
2. Be able to design marketing promotions	
Assessment criteria	
The learner can: 2.1 Devise marketing promotions that meet the marketing plan 2.2 Define the duration of the marketing promotion to maximise cost-efficiency 2.3 Justify proposals for marketing promotions with evidence 2.4 Explain the factors to be taken into account in planning marketing promotions 2.5 Explain the advantages and disadvantages of different marketing promotions 2.6 Explain the link between customer segments and proposed marketing promotions 2.7 Explain how promotions fit within the overall marketing strategy	

Unit 309   Implement a marketing plan

UAN:	D/502/9959
Level:	Level 3
Credit value:	4
GLH:	5
Relationship to NOS:	This unit is linked to Council for Administration NOS

Marketing 3.4.3 Implement a marketing distribution plan

Marketing 3.5.1 Develop a personal branding strategy and plan

Marketing 4.2.4 Develop an advertising campaign

Marketing 4.5.2 Manage sales promotion plans

Marketing 4.5.3 Implement sales promotion activity

Marketing 4.6.3 Implement a field marketing activity

Marketing 4.7.2 Manage business to business motivation plans

Marketing 6.1.2 Implement marketing strategies and plans for products/services

Marketing 6.2.3 Implement and evaluate marketing plans for international and/or diverse markets |
| **Assessment requirements specified by a sector or regulatory body:** | This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills

For those assessment criteria which are performance related the most likely form of evidence is assessor observation |
| **Aim:** | This unit concerns being able to prepare for and implement marketing plans |

Learning outcome	The learner will:
1. Be able to prepare for the implementation of marketing plans	
Assessment criteria	
The learner can: 1.1 Develop an implementation plan that specifies objectives, actions, responsibilities, budget, timescale and success criteria 1.2 Brief personnel on their roles and responsibilities in accordance with the marketing plan 1.3 Ensure the availability of agreed marketing resources	

1.4	Explain the importance of understanding the nature of the market in which the activity is being targeted

Learning outcome	The learner will:
2. Be able to implement marketing plans	
Assessment criteria	
The learner can:	

The learner can:

2.1 Deliver the requirements of the plan within budget and timescale

2.2 Address risks, problems and variances from expectations in accordance with the marketing plan

2.3 Keep stakeholders up to date with progress, developments and issues

2.4 Record and report on the outcomes of the implementation in accordance with the marketing plan and organisational procedures

2.5 Explain the importance of the marketing activity to the success of the marketing strategy

Unit 310   Develop an advertising campaign

UAN:	Y/502/9961
Level:	Level 3
Credit value:	3
GLH:	10
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 4.2.2 Develop the creative product within advertising Marketing 4.2.3 Develop a media plan for advertising products/services
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to generate creative advertising options and manage the implementation of advertising activities

Learning outcome	The learner will:
1. Be able to generate creative advertising options	

Assessment criteria
The learner can:
1.1   Develop concepts that: dramatise the agreed creative strategy; appeal to target customers; are distinctive and memorable; are ethical and sustainable and which differentiate the products and/or services from those of competitors
1.2   Ensure that the style, tone, words and format combine coherently
1.3   Prepare visualisations that illustrate proposed ideas in accordance with organisational procedures
1.4   Present creative proposals to stakeholders in the agreed format
1.5   Obtain stakeholders' agreement for the preferred option to proceed
1.6   Explain the role of advertising within the customer's overall marketing strategy
1.7   Explain the roles of those involved in the advertising creative and production processes
1.8   Explain how intellectual property rights might affect advertising campaigns

Learning outcome	The learner will:
2. Be able to manage the implementation of advertising activities	
Assessment criteria	

The learner can:

2.1 Evaluate the suitability and cost-effectiveness of a range of media vehicles for the campaign

2.2 Agree the schedule and pattern of advertising in accordance with agreed objectives

2.3 Agree the media type(s), vehicles and schedule in accordance with agreed objectives

2.4 Forecast anticipated response outcomes from advertising activities from an analysis of the target groups

2.5 Agree response mechanisms that can be handled within resource constraints

2.6 Agree monitoring processes that are capable of ensuring that the media schedule has been delivered

2.7 Explain the importance of reach, frequency and impact in achieving advertising objectives

2.8 Explain the role of each advertising medium in a consumer's life

Unit 311   Specify the design requirement for marketing databases

UAN:	D/502/9962
Level:	Level 3
Credit value:	3
GLH:	12
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 5.1.1 Develop a customer information strategy Marketing 5.1.2 Implement a customer information strategy
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to identify marketing database requirements and specify marketing database capabilities

Learning outcome	The learner will:
1. Be able to identify marketing database requirements	
Assessment criteria	
The learner can: 1.1 Identify marketing information requirements and its uses 1.2 Prioritise marketing information needs to meet the requirements of the marketing plan 1.3 Identify the nature, extent and possible uses of existing information 1.4 Prioritise the nature and extent of marketing information gaps to be filled 1.5 Calculate the cost of database design and marketing information acquisition 1.6 Evaluate the risks, potential consequences and cost of not acquiring information 1.7 Develop a business case, specifying needs, design solutions, costs, timescale, resources, uses and users and likely benefits 1.8 Explain the role of information systems in achieving the overall marketing strategy and objectives	

Learning outcome	The learner will:
2. Be able to specify marketing database capabilities	
Assessment criteria	
The learner can: 2.1 Specify the database's functionality in sufficient detail to ensure the database is fit for purpose 2.2 Ensure that the marketing database can be delivered within budget and timescale 2.3 Specify the uses and users of the marketing database 2.4 Specify the database such that information can be manipulated for different purposes 2.5 Obtain agreement from stakeholders to the proposed database 2.6 Explain the importance of synergy between different databases	

Unit 312   Manage outsourced marketing supplier relationships

UAN:	K/502/9964
Level:	Level 3
Credit value:	4
GLH:	12
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 7.2.4 Brief and work with third part suppliers of marketing/marketing communications suppliers Marketing 4.4.3 Build and manage stakeholder relationships
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to plan work to be carried out by outsourced suppliers of marketing services and monitor their performance

Learning outcome	The learner will:
1. Be able to plan work to be carried out by outsourced suppliers of marketing services	
Assessment criteria	
The learner can: 1.1 Brief suppliers on the scope, nature and objectives of the work to be carried out 1.2 Confirm that suppliers' proposed actions address targeted market segments 1.3 Agree a project plan containing a schedule of actions, key performance indicators and success criteria 1.4 Agree a monitoring programme that is capable of identifying variances from expected performance 1.5 Describe the objectives of the work for which the supplier has been contracted 1.6 Explain the roles, relationships, interdependencies and sensitivities of stakeholders	

Learning outcome	The learner will:
2. Be able to monitor the performance of suppliers of outsourced marketing services	
Assessment criteria	
The learner can: 2.1 Monitor progress against the agreed programme of key performance indicators 2.2 Identify variances from expected performance 2.3 Address variances in accordance with the project plan 2.4 Evaluate suppliers' performance against agreed success criteria 2.5 Use evaluative information and supplier feedback to enhance the effectiveness of future activities 2.6 Explain how stakeholders have been engaged in project activities 2.7 Explain the importance of monitoring suppliers' performance	

Unit 313   Use digital technology for marketing purposes

UAN:	M/502/9965
Level:	Level 3
Credit value:	5
GLH:	15
Relationship to NOS:	This unit is linked to ITQ L3 unit Using the internet
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to use digital tools for marketing purposes, carry out marketing research using the internet, devise digital marketing devices and messages and use digital technology for social media marketing purposes

Learning outcome	The learner will:
1. Be able to use digital tools for marketing purposes	
Assessment criteria	
The learner can: 1.1 Create digital marketing publicity that optimises the use of search engines 1.2 Evaluate the cost-effective use of PayPerClick (PPC) facilities 1.3 Ensure the consistency and relevance of Meta Tags to the marketing message 1.4 Ensure that website content is keyword-rich 1.5 Use offsite Search Engine Optimisation (SEO) in a way that meets the marketing strategy 1.6 Explain the use of response systems in SEO activities 1.7 Explain the importance of a keyword strategy 1.8 Explain the benefits and risks of a link strategy	

Learning outcome	The learner will:
2. Be able to carry out marketing research using the internet	
Assessment criteria	
The learner can: 2.1 Adapt and use browser facilities and search engines to identify	

required marketing information

2.2 Mine and extract marketing data using multiple selection criteria in accordance with the research specification

2.3 Identify marketing trends, patterns and opportunities from multiple-table relational databases

2.4 Explain the strengths and weaknesses of a range of tools and techniques to search the internet

2.5 Describe different ways of saving marketing information and sources of marketing information

2.6 Explain how intellectual property rights affect the use of marketing information downloaded from the internet

Learning outcome	The learner will:
3. Be able to create digital marketing devices and messages	
Assessment criteria	

The learner can:

3.1 Specify a Customer Relationship Management (CRM) system that is capable of identifying customer buying preferences and patterns

3.2 Create a range of digital marketing devices that are targeted on identified market segments

3.3 Create response systems appropriate for each marketing device

3.4 Use tracking systems that are capable of adding value to marketing information databases

Learning outcome	The learner will:
4. Be able to use digital technology for social media marketing purposes	
Assessment criteria	

The learner can:

4.1 Use CRM system to identify target customers

4.2 Use the digital medium that is most appropriate for the marketing message to be conveyed

4.3 Adopt writing and visual styles that are best suited to the chosen digital marketing medium

4.4 Integrate the use of multiple digital tools and devices to optimise their marketing potential

4.5 Present non-standard marketing reports and recommendations that are supported by statistical evidence

4.6 Explain the strengths and weaknesses of a range of digital technologies for marketing purposes

4.7 Explain the precautions used to prevent marketing messages being identified as 'spam'

4.8 Explain the structure of social networking sites

4.9 Explain techniques for increasing hits on social networking sites

Unit 314 Contribute to running a project

UAN:	J/601/2549
Level:	Level 3
Credit value:	5
GLH:	30
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA151.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit is about contributing to achieving project's agreed aims and objectives as it impacts on stakeholders

Learning outcome	The learner will:
1. Understand how to contribute to agree to a project brief	
Assessment criteria	
The learner can: 1.1 Describe the difference between routine work and taking part in a project 1.2 Explain the advantages and disadvantages of using projects and when projects are appropriate 1.3 Explain the project-planning methodologies appropriate to the types of projects run and the tools that can be used to assist project planning and control 1.4 Explain the purpose and benefits of identifying stakeholders involved in the project 1.5 Explain the purpose of contributing to agreeing a project's purpose, scope, timescale, costs, aims and objectives 1.6 Explain the purpose of agreeing a budget for a project 1.7 Describe how to estimate types and quantity of resources needed to run a project 1.8 Describe how to identify project risks and develop contingency plans, if required	

Learning outcome	The learner will:
2. Understand how to contribute to a project	
Assessment criteria	

The learner can:

2.1 Describe the types of information needed to monitor projects and the methods that can be used to give information

2.2 Describe how to estimate and control resources in an area of work during a project

2.3 Explain the purpose of reporting own progress during a project

2.4 Outline reasons for seeking advice in response to unexpected events

2.5 Explain the purpose and benefits of contributing towards achieving projects within agreed timescales

2.6 Explain the purpose and benefits of keeping records of all project activity within the scope of own work

2.7 Describe different ways of communicating with those involved in or affected by a project to make sure it runs smoothly

Learning outcome	The learner will:
3. Understand the purpose of contributing to the evaluation of a project	
Assessment criteria	

The learner can:

3.1 Describe different types of methods available to monitor projects

3.2 Explain the purpose of making own contributions when evaluating projects

3.3 Describe how to learn lessons for the future for own work

Learning outcome	The learner will:
4. Be able to contribute to preparing and planning a project	
Assessment criteria	

The learner can:

4.1 Confirm the purpose of the project with all stakeholders

4.2 Confirm project scope, timescale, aims and objectives

4.3 Contribute to the preparation of a project specification

4.4 Confirm all types of resources for all stakeholders

4.5 Confirm with all stakeholders, the project plan and timed use of all types of resources for an area of work

4.6 Contribute to identifying risks and develop contingency plans for an area of work

Learning outcome	The learner will:
5. Be able to contribute to running a project	
Assessment criteria	

The learner can:

5.1 Implement a project

5.2 Communicate with all stakeholders involved with or affected by a project

5.3	Adapt project plans for stakeholders to respond to unexpected events and risks
5.4	Provide interim reports on project progress to relevant stakeholders
5.5	Achieve required outcomes for relevant stakeholders on time and to budget
5.6	Seek advice in response to unexpected events, if required
5.7	Keep records of project activity

Learning outcome	The learner will:
6. Be able to contribute to evaluating the outcomes of a project	
Assessment criteria	
The learner can:	
6.1 Evaluate project for all stakeholders	
6.2 Report on the degree to which a project met its aims and objectives for all stakeholders	
6.3 Report on project strengths and areas for improvement for all stakeholders	

Unit 315   Contribute to innovation in a business environment

UAN:	A/601/2547
Level:	Level 3
Credit value:	4
GLH:	30
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA112.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about making contributions to improving ways of working, products or services, by questioning, researching and actively developing ideas for new ways of working, products or services which can then be put forward as suggestions to decision-makers.

Learning outcome	The learner will:
1. Understand the purpose and benefits of innovation in a business environment	

Assessment criteria
The learner can:
1.1   Explain the purpose of innovation as a way of staying competitive and offering new solutions
1.2   Explain the purpose of questioning existing ways of working in own area of work and assumptions about them

Learning outcome	The learner will:
2. Understand how to contribute to research, develop and review ideas for new approaches and solutions	

Assessment criteria
The learner can:
2.1   Explain the purpose of reviewing existing working methods, products or services
2.2   Explain ways of reviewing existing working methods, products or services
2.3   Identify sources of information for new approaches and solutions
2.4   Describe ways of collecting information on possible improvements
2.5   Explain the purpose of working with others when developing new

approaches and solutions

2.6 Explain the benefits of working with others when agreeing how to present ideas to decision-makers, and ways of doing so
2.7 Explain how to work with others to develop and agree an idea
2.8 Explain how to decide when an idea is, or is not possible
2.9 Explain the purpose of reviewing and learning from mistakes

Learning outcome	The learner will:
3. Understand how to present suggestions for new approaches and solutions	
Assessment criteria	

The learner can:
3.1 Explain the purpose of selling ideas to decision-makers
3.2 Describe how to present and sell suggestions for new approaches and solutions to decision-makers to achieve a positive outcome

Learning outcome	The learner will:
4. Be able to contribute to research and develop ideas	
Assessment criteria	

The learner can:
4.1 Question constructively existing ways of working in own area of responsibility
4.2 Contribute to researching and identifying possible improvements to working methods, products or services in own area of responsibility
4.3 Contribute to the collection of information that can be used to develop ideas for new approaches and solutions
4.4 Agree criteria for evaluating ideas including fit with organisational aims and objectives

Learning outcome	The learner will:
5. Be able to present suggestion for new approaches and solutions	
Assessment criteria	

The learner can:
5.1 Present and sell suggestions for new approaches and /or solutions
5.2 Communicate risks to others in a suitable format

Learning outcome	The learner will:
6. Be able to evaluate, review and make suggestions for new approaches and solutions	
Assessment criteria	

The learner can:
6.1 Contribute to the evaluation of ideas for new approaches and solutions using
   a) fit with organisational aims and objectives
   b) other agreed criteria
6.2 Evaluate ideas to challenge own assumptions and thinking about ways of working, products or services

6.3	Contribute to the selling of ideas to others
6.4	Seek feedback on ideas, analyse feedback. and show a willingness to compromise
6.5	Contribute to the assessment of idea(s) and decide whether a suggestion for a new approach / solution is possible

Unit 316   Develop a presentation

UAN:	M/601/2528
Level:	Level 3
Credit value:	3
GLH:	15
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA617.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.

Aim:	This unit is about developing a presentation

Learning outcome	The learner will:
1. Understand the purpose of preparing for and evaluating a presentation	
Assessment criteria	
The learner can: 1.1 Explain the purpose of using different types of presentation and equipment to provide information 1.2 Explain the procedures to be followed when preparing a presentation, including planning, preparation of content, materials, and contingencies 1.3 Explain the benefits of preparing for giving a presentation 1.4 Explain and illustrate how presentations may be enhanced by materials and equipment 1.5 Explain the purpose and benefits of reflecting on the feedback obtained of the written presentation	

Learning outcome	The learner will:
2. Be able to develop a presentation	
Assessment criteria	
The learner can: 2.1 Agree and confirm audience, purpose, content, style and timing of a presentation 2.2 Research and plan a presentation 2.3 Select any equipment needed for the presentation 2.4 Prepare content, shape and structure of a presentation to achieve its purpose and suit needs of audience 2.5 Obtain feedback on planned presentation and make adjustments, if required 2.6 Produce presentation handouts	

2.7	Collect feedback on the written presentation
2.8	Reflect on the feedback obtained of the written presentation and identify learning points
2.9	Identify changes that will improve future written presentations

Unit 317   Deliver a presentation

UAN:	T/601/2529
Level:	Level 3
Credit value:	3
GLH:	15
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA623.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit covers the skills, knowledge and understanding learners need to prepare for, deliver and evaluate a presentation for an audience.

Learning outcome	The learner will:
1. Understand the purpose of preparing for and evaluating a presentation	

Assessment criteria

The learner can:

1.1   Explain the purpose of using different types of presentation and equipment

1.2   Explain different ways of delivering presentations and their features

1.3   Explain the procedures to be followed when preparing a presentation

1.4   Explain the benefits of preparing for giving a presentation

1.5   Describe the types of problems that may occur with equipment and how to deal with them

1.6   Explain the purpose and benefits of contingency planning

1.7   Explain the purpose and benefits of collecting feedback from the audience on the presentation

1.8   Explain the purpose and benefits of evaluating presentations and own performance

Learning outcome	The learner will:
2. Understand the techniques used in enhancing a presentation	

Assessment criteria

The learner can:

2.1   Explain and illustrate how presentations may be enhanced by materials and equipment

2.2   Explain and illustrate how presentations may be enhanced by use

| of communication and interpersonal skills |
2.3	Describe how to gauge audience reaction to the presentation
2.4	Explain the purpose and benefits of summarising important features of the presentation
2.5	Describe the purpose and benefits of giving the audience opportunities to ask questions

Learning outcome	The learner will:
3. Be able to prepare for delivery of a presentation	
Assessment criteria	

The learner can:

3.1	Select any equipment needed and plan how to use it to best effect
3.2	Make contingency plans in case of equipment failure or other problems, if required
3.3	Practise the presentation and its timing
3.4	Obtain feedback on planned presentation and make adjustments, if required

Learning outcome	The learner will:
4. Be able to deliver a presentation	
Assessment criteria	

The learner can:

4.1	Check equipment and resources
4.2	Circulate presentation materials
4.3	Introduce self to audience and state aims of the presentation
4.4	Address the audience, speaking clearly and confidently, using language to suit the topic and audience
4.5	Vary tone, pace and volume to emphasise key points
4.6	Gauge audience reaction during the presentation and adapt if required
4.7	Summarise throughout the presentation to emphasise key points and help to maintain audience interest
4.8	Use body language in a way that reinforces presented information
4.9	Use equipment, where appropriate, to enhance the presentation, and deal with any problems that may occur
4.10	Provide the audience with opportunities to ask questions
4.11	Listen carefully to questions and respond in a way that meets the audience's needs

Learning outcome	The learner will:
5. Be able to evaluate a presentation	
Assessment criteria	

The learner can:

5.1	Collect feedback on the presentation
5.2	Reflect on own performance and identify learning points
5.3	Evaluate the presentation and own performance and identify changes that will improve future presentations

Unit 318   Agree a budget

UAN:	J/601/2552
Level:	Level 3
Credit value:	4
GLH:	25
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA531.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about developing and agreeing a budget for a department or section within a business

Learning outcome	The learner will:
1. Understand how to develop budgets	

Assessment criteria
The learner can:
1.1 Explain how to use estimations when developing a draft budget
1.2 Explain how to identify priorities and financial resources needed when preparing a budget
1.3 Explain the purpose and benefits of identifying priorities when preparing a budget
1.4 Explain the purpose and benefits of evaluating and justifying estimated costs and income
1.5 Describe procedures for negotiating superseded budgets
1.6 Describe skills needed for agreeing budgets

Learning outcome	The learner will:
2. Be able to agree a budget	

Assessment criteria
The learner can:
2.1 Identify financial resources needed to achieve goals and objectives for agreeing a budget
2.2 Evaluate and justify costs and risks
2.3 Prepare a draft budget
2.4 Negotiate and agree a budget

Unit 319   Contribute to decision-making in a business environment

UAN:	Y/601/2524
Level:	Level 3
Credit value:	3
GLH:	12
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAG121.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about contributing to the decision making process made in a business environment.

Learning outcome	The learner will:
1. Understand the purpose and process of decision-making	
Assessment criteria	
The learner can: 1.1 Identify situations where decision-making is required 1.2 Explain key stages in the decision-making process	

Learning outcome	The learner will:
2. Understand how to prepare to contribute to decision-making	
Assessment criteria	
The learner can: 2.1 Understand the purpose of knowing the context in which a decision is being made 2.2 Describe the role and responsibilities of a person contributing to decision-making 2.3 Describe possible limitations on a person contributing to decision-making 2.4 Identify sources of information that can be used to inform decision-making 2.5 Explain how to research information to be used to inform decision-making	

Learning outcome	The learner will:
3. Understand how to contribute to decision-making	
Assessment criteria	
The learner can: 3.1 Explain the purpose of contributing to meetings and other discussions where decisions are being made, and ways of doing so 3.2 Explain how to structure own ideas and information 3.3 Explain the purpose and benefits of respecting other people's contributions to the decision-making process 3.4 Explain the purpose of listening and responding to other people during the decision-making process, and ways of doing so 3.5 Explain how to use evidence, argument, questioning and assertiveness to influence outcomes 3.6 Explain the purpose of collective responsibility	

Learning outcome	The learner will:
4. Be able to prepare contributions to decision-making	
Assessment criteria	
The learner can: 4.1 Identify sources of information needed 4.2 Research and collect information to add value to the decision-making process	

Learning outcome	The learner will:
5. Be able to make contributions to decision-making	
Assessment criteria	
The learner can: 5.1 Present information to others and develop ideas, using accurate and current information 5.2 Make constructive, relevant and timely contributions to meeting(s) or other discussions to contribute to making a decision 5.3 Provide additional information, when asked, to contribute to making a decision 5.4 Contribute to identifying and agreeing criteria for making a decision 5.5 Contribute to structuring ideas and information in a way that helps other people understand own ideas 5.6 Listen to other people's contributions adapting own ideas as necessary 5.7 Contribute to reviewing information provided for a decision to be made 5.8 Confirm support for an agreed decision	

Unit 320   Negotiate in a business environment

UAN:	D/601/2525
Level:	Level 3
Credit value:	5
GLH:	20
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAG123.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about preparing for, and carrying out straightforward negotiations with other parties, in a business environment, in order to reach an agreement on an activity or activities that meets the needs of an organisation.

Learning outcome	The learner will:
1. Understand how to prepare for negotiations	

Assessment criteria
The learner can:
1.1   Outline the main principles of negotiations
1.2   Outline the process of negotiation and how it is used in business
1.3   Outline the purpose of different negotiation strategies and techniques
1.4   Explain the value of understanding the roles of other negotiators
1.5   Explain the purpose of knowing limits of own responsibility in negotiations
1.6   Explain the purpose of having clear objectives for negotiations

Learning outcome	The learner will:
2. Understand how to conduct negotiations	

Assessment criteria
The learner can:
2.1   Explain the purpose of being flexible during negotiations while seeking to achieve the main objectives
2.2   Explain the purpose of keeping to the brief during negotiations
2.3   Explain the purpose of keeping to own level of authority during negotiations
2.4   Explain the purpose of referring issues to others, as required

2.5	Explain the purpose of keeping goodwill during negotiations, and ways of doing so
2.6	Explain when it might be necessary to withdraw from negotiations
2.7	Explain how to withdraw from negotiations in a way that maintains goodwill

Learning outcome	The learner will:
3. Understand how to complete negotiations	
Assessment criteria	
The learner can:	
3.1 Explain the purpose of achieving an outcome that meets main objectives	
3.2 Explain the purpose of keeping an accurate record of negotiations, if required	

Learning outcome	The learner will:
4. Be able to prepare for negotiation	
Assessment criteria	
The learner can:	
4.1 Identify objectives to be achieved	
4.2 Identify potential problems in negotiation(s) and ways of overcoming them	

Learning outcome	The learner will:
5. Be able to conduct negotiations	
Assessment criteria	
The learner can:	
5.1 Carry out negotiations within limits of own authority	
5.2 Make proposals which meet main objectives	
5.3 Use negotiation strategy to obtain results that meet minimum or agreed outcomes	
5.4 Clarify other negotiator's understanding, and respond to their queries	
5.5 Suggest solutions to deal with problems, if required	
5.6 Refer the negotiation to others, when required	
5.7 Carry out negotiations in a way that maintains goodwill and promotes a positive image of self and an organisation	

Learning outcome	The learner will:
6. Be able to complete negotiations	
Assessment criteria	
The learner can:	
6.1 Reach an agreement to the satisfaction of all those involved in the negotiations, where possible	
6.2 Maintain records of the negotiations, if required	
6.3 Complete negotiations in a way that maintains goodwill and promotes a positive image of self and an organisation	

Unit 321   Plan and organise an event

UAN:	R/601/2540
Level:	Level 3
Credit value:	4
GLH:	28
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA312.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about planning and organising an event.

Learning outcome	The learner will:
1. Understand the role of an event organiser in planning an event	

Assessment criteria

The learner can:
1.1   Explain the purpose and benefits of planning an event
1.2   Explain the role of the event organiser in:
    a) meeting the objectives of the event
    b) agreeing a brief and budget for the event
1.3   Identify and evaluate the types of risks associated with events and explain how to minimise these
1.4   Explain the purpose and benefits of a contingency plan for an event
1.5   Describe the types of problems that may occur when organising an event and how to solve them
1.6   Categorise different types of events and their main features

Learning outcome	The learner will:
2. Understand the arrangements to be made when planning and organising an event	

Assessment criteria

The learner can:
2.1   Explain the role of the event organiser for
    a) anticipating and planning for all delegate provision and needs before and during the event, including investigating and providing for any special requirements
    b) meeting relevant health, safety and security arrangements
    c) meeting legal and organisational requirements for contracts
    d) organising resources and the production of event materials
    e) the types of activities and resources that may be needed during

an event

f) liaison with the venue and the supporting team to make sure all requirements are met and roles are understood

Learning outcome	The learner will:

3. Understand the different types of venues and resources needed for different types of events

Assessment criteria

The learner can:

3.1 Identify and evaluate different types of venue in terms of suitability for events and costs

3.2 Describe a range of resources that may be needed for events and illustrate how they may be used

3.3 Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event

Learning outcome	The learner will:

4. Be able to plan and organise an event

Assessment criteria

The learner can:

4.1 Agree an event brief and budget

4.2 Agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies

4.3 Identify and agree resources and support needed for organising an event

4.4 Agree requirements for venue(s)

4.5 Identify venue and agree costings

4.6 Liaise with the venue to confirm event requirements and / or any special delegate requirements

4.7 Agree requirements for resources

4.8 Co-ordinate resources and production of event materials

4.9 Make sure arrangements are in place for the event to meet relevant health, safety and security requirements

4.10 Make sure legal and organisational requirements for contracts are met

4.11 Make sure that all those involved are briefed and trained to fulfil their roles

4.12 Delegate functions to the event team as required

4.13 Make arrangements for rehearsals to make sure the event runs smoothly, if required

4.14 Make sure invitations are sent out to delegates

4.15 Manage delegate responses

4.16 Prepare joining instructions and event materials to be sent to delegates

Unit 322   Co-ordinate an event

UAN:	Y/601/2541
Level:	Level 3
Credit value:	4
GLH:	30
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA312.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about co-ordinating the delivery of an event.

Learning outcome	The learner will:
1. Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief	
Assessment criteria	
The learner can: 1.1 Explain the responsibilities of an event co-ordinator 1.2 Describe the purpose of agreeing a plan that meets the objectives of the event brief	

Learning outcome	The learner will:
2. Understand the activities required when co-ordinating an event	
Assessment criteria	

The learner can:
 2.1   Explain the role of the event co-ordinator during the event for:
    a) all delegate provision and needs
    b) meeting relevant health, safety and security requirements
    c) observing legal and organisational requirements for contracts
    d) co-ordinating resources and the use of event materials
    e) liaising with the venue and supporting team during an event to make sure all requirements are met and roles are carried out
    f) resolving problems
    g) overseeing the work of key staff
 2.2   Explain the role of an event co-ordinator after an event for:
    a) clearing and vacating the venue
    b) organising follow up papers and activities, if required
    c) reconciling accounts to budget
    d) evaluating an event and the methods that can be used to do this	

Learning outcome	The learner will:
3. Be able to co-ordinate an event	
Assessment criteria	
The learner can: 3.1 Prepare the venue and make sure all necessary resources are in place 3.2 Co-ordinate activities during an event, in line with agreed plans 3.3 Help delegates to feel welcome 3.4 Respond to delegates' needs throughout an event 3.5 Resolve problems, as required 3.6 Oversee the work of key staff during the event 3.7 Monitor compliance with relevant health, safety and security requirements 3.8 Liaise with the management of the venue to make sure facility resources are in place 3.9 Arrange clearing, and vacating the venue according to the terms of the contract 3.10 Prepare and circulate papers, or complete other follow up actions following the event, if required 3.11 Reconcile accounts to budget, if required 3.12 Evaluate an event identifying recommendations and passing these on to relevant colleagues, where relevant 3.13 Agree key learning points and use these to improve the running of future events	

Unit 323   Plan, allocate and monitor work of a team

UAN:	Y/600/9669
Level:	Level 3
Credit value:	5
GLH:	25
Relationship to NOS:	This unit is linked to Council for Administration NOS
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council for Administration
Aim:	This unit is about planning, allocating and monitoring the work of a team.

Learning outcome	The learner will:
1. Be able to plan work for a team.	
Assessment criteria	
The learner can: 1.1 Agree team objectives with own manager. 1.2 Develop a plan for a team to meet agreed objectives, taking into account capacity and capabilities of the team.	

Learning outcome	The learner will:
2. Be able to allocate work across a team.	
Assessment criteria	
The learner can: 2.1 Discuss team plans with a team. 2.2 Agree work allocation and SMART (Specific, Measurable, Achievable, Realistic and Time-bound) objectives with team members. 2.3 Agree standard of work required by team.	

Learning outcome	The learner will:
3. Be able to manage team members to achieve team objectives.	
Assessment criteria	
The learner can: 3.1 Support all team members in order to achieve team objectives.	

Learning outcome	The learner will:
4. Be able to monitor and evaluate the performance of team members.	
Assessment criteria	
The learner can: 4.1 Assess team members' work against agreed standards and objectives. 4.2 Identify and monitor conflict within a team. 4.3 Identify causes for team members not meeting team objectives.	

Learning outcome	The learner will:
5. Be able to improve the performance of a team.	
Assessment criteria	
The learner can: 5.1 Identify ways of improving team performance. 5.2 Provide constructive feedback to team members to improve their performance. 5.3 Implement identified ways of improving team performance.	

Unit 324   Presentation software

UAN:	T/502/4623
Level:	Level 3
Credit value:	6
GLH:	45
Relationship to NOS:	This unit is linked to the Level 3 National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.
Aim:	This unit is about the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing.

Learning outcome	The learner will:
1. Input and combine text and other information within presentation slides	

Assessment criteria

The learner can:

1.1   Explain what types of information are required for the presentation

1.2   Enter text and other information using layouts appropriate to type of information

1.3   Insert charts and tables and link to source data

1.4   Insert images, video or sound to enhance the presentation

1.5   Identify any constraints which may affect the presentation

1.6   Organise and combine information for presentations in line with any constraints

1.7   Store and retrieve presentation files effectively, in line with local guidelines and conventions where available

Learning outcome	The learner will:
2. Use presentation software tools to structure, edit and format presentations	

Assessment criteria

The learner can:

2.1   Explain when and how to use and change slide structure and themes to enhance presentations

2.2   Create, amend and use appropriate templates and themes for slides

2.3	Explain how interactive and presentation effects can be used to aid meaning or impact
2.4	Select and use appropriate techniques to edit and format presentations to meet needs
2.5	Create and use interactive elements to enhance presentations
2.6	Select and use animation and transition techniques appropriately to enhance presentations

Learning outcome	The learner will:
3. Prepare interactive slideshow for presentation	
Assessment criteria	
The learner can:	
3.1 Explain how to present slides to communicate effectively for different contexts	
3.2 Prepare interactive slideshow and associated products for presentation	
3.3 Check presentation meets needs, using IT tools and making corrections as necessary	
3.4 Evaluate presentations, identify any quality problems and discuss how to respond to them	
3.5 Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose	

Unit 325   Spreadsheet software

UAN:	J/502/4626
Level:	Level 3
Credit value:	6
GLH:	45
Relationship to NOS:	This unit is linked to the Level 3 National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.
Aim:	This unit is about the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs.

Learning outcome	The learner will:
1. Use a spreadsheet to enter, edit and organise numerical and other data	

Assessment criteria

The learner can:

1.1   Identify what numerical and other information is needed in the spreadsheet and how it should be structured

1.2   Enter and edit numerical and other data accurately

1.3   Combine and link data from different sources

1.4   Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available

Learning outcome	The learner will:
2. Select and use appropriate formulas and data analysis tools and techniques to meet requirements	

Assessment criteria

The learner can:

2.1   Explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them

2.2   Select and use a wide range of appropriate functions and formulas to meet calculation requirements

2.3   Select and use a range of tools and techniques to analyse and interpret data to meet requirements

2.4   Select and use forecasting tools and techniques

Learning outcome	The learner will:
3. Use tools and techniques to present, and format and publish spreadsheet information	
Assessment criteria	
The learner can:	
3.1 Explain how to present and format spreadsheet information effectively to meet needs	
3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively	
3.3 Select and use appropriate tools and techniques to generate, develop and format charts and graphs	
3.4 Select and use appropriate page layout to present, print and publish spreadsheet information	
3.5 Explain how to find and sort out any errors in formulas	
3.6 Check spreadsheet information meets needs, using IT tools and making corrections as necessary	
3.7 Use auditing tools to identify and respond appropriately to any problems with spreadsheets	

UAN:	T/502/4380
Level:	Level 3
Credit value:	6
GLH:	45
Relationship to NOS:	This unit is linked to the Level 3 National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.
Aim:	This unit is about the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.

Learning outcome	The learner will:
1. Stay safe and secure when with collaborative technology	

Assessment criteria

The learner can:
1.1 Explain what and why guidelines need to be established for working with collaborative technology
1.2 Develop and implement guidelines for good practice in working with collaborative technology
1.3 Explain how to establish an identity or present information that will promote trust
1.4 Develop and implement guidelines for checking the authenticity of identities and different types of information
1.5 Analyse and plan for the risks in the use of collaborative technologies for different tasks
1.6 Analyse and manage risks in the use of collaborative technologies

Learning outcome	The learner will:

2. Plan and set up IT tools and devices for collaborative working

Assessment criteria

The learner can:

2.1 Explain the features, benefits and limitations of different collaborative IT tools and devices for work purposes and tasks

2.2 Determine the IT tools and processes needed for archiving the outcomes of collaborative working

2.3 Summarise ways to integrate different collaborative technology tools and devices for a range of purposes, tasks and communication media

2.4 Explain potential access and compatibility issues with integrating different collaborative technology tools and devices

2.5 Select, connect and configure combinations that exploit the capabilities and potential of collaborative tools and devices

2.6 Resolve access and compatibility problems so that different collaborative tools and devices work successfully

Learning outcome	The learner will:

3. Prepare collaborative technologies for use

Assessment criteria

The learner can:

3.1 Evaluate data management principles, issues and methods

3.2 Manage levels of access and permissions for different purposes

3.3 Select and integrate different elements across applications to create environments for collaborative technologies

3.4 Set and adjust settings to facilitate use of collaborative technologies by others

3.5 Manage data flow to benefit collaborative working

Learning outcome	The learner will:

4. Manage tasks using collaborative technologies

Assessment criteria

The learner can:

4.1 Determine levels of responsibility for the use of collaborative technologies

4.2 Facilitate others' responsible contributions to and engagement with collaborative technologies

4.3 Manage the moderation of collaborative technologies

4.4 Oversee the archiving of the outcomes of collaborative working

4.5 Explain what problems can occur with collaborative technologies

4.6 Respond to problems with collaborative technologies and be prepared to help others to do so

Unit 327   Website software

UAN:	Y/502/4632
Level:	Level 3
Credit value:	5
GLH:	40
Relationship to NOS:	This unit is linked to the Level 3 National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.
Aim:	This unit is about the ability to use a software application designed for planning, designing and building websites.

Learning outcome	The learner will:
1. Create structures and styles and use them to produce websites	

Assessment criteria

The learner can:

1.1 Determine what website content and layout will be needed for each page and for the site
1.2 Plan and create web page templates to layout content
1.3 Select and use website features and structures to enhance website navigation and functionality
1.4 Create, select and use styles to enhance website consistency and readability
1.5 Provide guidance on laws, guidelines and constraints that affect the content and use of websites
1.6 Explain what access issues may need to be taken into account
1.7 Explain when and why to use different file types for saving content
1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available

Learning outcome	The learner will:
2. Select and use website software tools and features to develop multiple page websites with multimedia and interactive features	

Assessment criteria

The learner can:

2.1 Prepare content for web pages so that it is ready for editing and formatting
2.2 Organise and combine information needed for web pages in line

with any copyright constraints, including across different software
2.3   Select and use appropriate editing and formatting techniques to aid meaning
2.4   Select and use appropriate programming and development techniques to add features and enhance websites
2.5   Select and use file formats that make information easier to download
2.6   Check web pages meet needs, using IT tools and making corrections as necessary

Learning outcome	The learner will:
3. Publish and test multiple page websites with multimedia and interactive features	
Assessment criteria	
The learner can:	
3.1 Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned	
3.2 Identify any quality problems with websites and explain how to respond to them	
3.3 Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently	
3.4 Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose	

Unit 328 Bespoke software

UAN:	J/502/4397
Level:	Level 3
Credit value:	4
GLH:	30
Relationship to NOS:	This unit is linked to the Level 3 National Occupational Standards for IT users devised by e-Skills UK (Sector Skills Council for ICT)
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by e-Skills UK, the Sector Skills Council for ICT.
Aim:	This unit is about the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.

Learning outcome	The learner will:
1. Input and combine information using bespoke software	

Assessment criteria

The learner can:

1.1 Input relevant information accurately so that it is ready for processing

1.2 Select and use appropriate techniques to link and combine information within the application and across different software applications

Learning outcome	The learner will:
2. Create and modify appropriate structures to organise and retrieve information efficiently	

Assessment criteria

The learner can:

2.1 Evaluate the use of software functions to structure, layout and style information

2.2 Create, change and use appropriate structures and/or layouts to organise information efficiently

2.3 Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available

Learning outcome	The learner will:
3. Exploit the functions of the software effectively to process and present information	
Assessment criteria	
The learner can:	
3.1 Select and use appropriate tools and techniques to edit, analyse and format information	
3.2 Check information meets needs, using IT tools and making corrections as necessary	
3.3 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs	
3.4 Select and use presentation methods to aid clarity and meaning	

Unit 330   Evaluate the effectiveness of a marketing plan

UAN:	R/502/9960
Level:	Level 3
Credit value:	4
GLH:	10
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 3.1.5 Evaluate and report on social marketing strategies Marketing 3.4.3 Implement a marketing distribution plan Marketing 3.5.1 Develop a personal branding strategy and plan Marketing 4.2.6 Evaluate advertising Marketing 4.5.2 Manage sales promotion plans Marketing 4.5.3 Implement sales promotion plans Marketing 4.6.3 Implement a field marketing activity Marketing 4.7.2 Manage business to business motivation plans Marketing 6.1.2 Implement marketing strategies and plans for products/services Marketing 6.2.3 Implement and evaluate marketing plans for international and/or diverse markets
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to plan the evaluation of marketing activities and evaluate the effectiveness of the marketing plan

Learning outcome	The learner will:
1. Be able to plan the evaluation of marketing activities	
Assessment criteria	
The learner can: 1.1 Establish an evaluation framework which incorporates: a baseline;	

realistic and achievable objectives; key performance indicators and success criteria; process and impact evaluation mechanisms; feedback and communication mechanisms and mechanisms for calculating return on investment

1.2   Agree evaluation resources with stakeholders
1.3   Gain stakeholders' agreement to the methods, tools and techniques that are most suited to carry out the evaluation

Learning outcome	The learner will:
2. Be able to evaluate the effectiveness of the marketing plan	
Assessment criteria	
The learner can:	

2.1   Use agreed methods to evaluate quantitative and qualitative data against agreed success criteria
2.2   Assess the impact of the marketing plan against agreed criteria
2.3   Identify the reasons for variances in performance from expectations
2.4   Recommend actions to address possible variances in accordance with the marketing plan
2.5   Evaluate the quality, cost-effectiveness and cost-efficiency of the marketing activity against agreed criteria
2.6   Report on the findings of the evaluation in the agreed format
2.7   Use evaluation results to inform future strategic planning
2.8   Explain the importance of evaluating marketing activities
2.9   Explain the advantages and disadvantages of a range of evaluation methods

Unit 401	Contribute to the preparation of a marketing strategy

UAN:	M/502/9934
Level:	Level 4
Credit value:	6
GLH:	25
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 1.3.2 Define the customer experience towards informing marketing strategy Marketing 3.1.1 Develop marketing strategies and plans for products and services
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to identify the trends and behaviour patterns of the target market and contribute to the development of a marketing strategy

Learning outcome	The learner will:
1. Be able to identify the trends and behaviour patterns of the target market	
Assessment criteria	
The learner can: 1.1 Establish target customers' trends and behaviour patterns 1.2 Evaluate the implications of identified trends and patterns 1.3 Assess threats to products and/or services arising from buying trends/patterns 1.4 Prioritise threats and opportunities to potential income and profitability against agreed criteria 1.5 Evaluate the strengths and weaknesses of sources of information on target customers' buying patterns 1.6 Explain the importance of evaluating threats and opportunities 1.7 Explain the advantages and disadvantages of a range of tools to identify threats and opportunities	

Learning outcome	The learner will:
2. Be able to contribute to the development of a marketing strategy	
Assessment criteria	
The learner can: 2.1 Prioritise marketing objectives for products and/or services to align with the overall marketing strategy 2.2 Prioritise target market segments against agreed criteria 2.3 Agree a marketing strategy that contains actions, contingencies, accountabilities, milestones, success criteria and budget 2.4 Justify forecasted demand for products and/or services 2.5 Identify realistic key performance indicators 2.6 Specify monitoring arrangements that are capable of identifying variances from targets and expectations 2.7 Identify sufficient resources to enable the delivery of the strategy	

Unit 402	Contribute to the development of new products and/or services

UAN:	A/502/9936
Level:	Level 4
Credit value:	4
GLH:	16
Relationship to NOS:	This unit is linked to Council for Administration NOS Marketing 6.2.1 Assess marketing opportunities within international and/or diverse markets Marketing 3.2.1 Establish requirements for product/services Marketing 3.2.2 Develop new products/services
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit concerns being able to assess marketing opportunities in new markets and establish requirements for new products and/or services

Learning outcome	The learner will:
1. Be able to contribute to the assessment of marketing opportunities for new products and/or services	
Assessment criteria	

The learner can:

1.1 Identify opportunities from an analysis against agreed criteria, using tools that are appropriate for the task

1.2 Establish target customers' perception and likely use(s) of the product and/or service

1.3 Assess the likely impact of customers' culture and behaviours on potential sales

1.4 Identify the nature of potential threats posed by competitors

1.5 Describe political, economic, social, technological and legal factors to be taken into account when assessing marketing opportunities for new products and/or services

1.6	Explain the advantages and disadvantages of a range of tools to identify market opportunities and threats

Learning outcome	The learner will:
2. Be able to establish requirements for new products and/or services	
Assessment criteria	
The learner can: 2.1 Specify how the proposed products and/or services align with the marketing strategy 2.2 Justify the recommendation to develop new products and/or services 2.3 Propose market test plans for products and/or services that contain specified actions, timescales, resource requirements and evaluation criteria 2.4 Explain how to distinguish between product ideas, concepts and image and the stages of development 2.5 Explain how the power of a brand influences demand for new products and/or services 2.6 Explain the advantages and disadvantages of different forms of market testing 2.7 Describe sources for the generation of ideas for new products and/or services 2.8 Explain the implications of competitor activity on the development of proposed new products and/or services 2.9 Explain how to price new products and/or services 2.10 Explain the advantages and disadvantages of different forecasting methods	

Unit 403	Develop working relationships with colleagues and stakeholders

UAN:	K/600/9661
Level:	Level 4
Credit value:	4
GLH:	20
Relationship to NOS:	This unit is linked to MSC D2 Develop productive working relationships with colleagues and stakeholders
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by the Council For Administration, the Standard Setting Body for business skills For those assessment criteria which are performance related the most likely form of evidence is assessor observation
Aim:	This unit will help learners to develop effective working relationships with colleagues and stakeholders

Learning outcome	The learner will:
1. Know how to identify stakeholders and their relevance to an organisation	

Assessment criteria
The learner can: 1.1 Identify an organisation's stakeholders. 1.2 Evaluate the roles, responsibilities, interests and concerns of stakeholders. 1.3 Assess the importance of identified stakeholders

Learning outcome	The learner will:
2. Understand how to establish working relationships with colleagues and stakeholders	

Assessment criteria
The learner can: 2.1 Clarify how to agree a common sense of purpose with colleagues and stakeholders. 2.2 Summarise how to create an environment of trust and mutual respect with colleagues and stakeholders

Learning outcome	The learner will:
3. Be able to create an environment of trust and mutual respect with colleagues and stakeholders	
Assessment criteria	
The learner can: 3.1 Review and revise the needs and motivations of colleagues and stakeholders. 3.2 Demonstrate interaction with colleagues and stakeholders that allows respect for the views and actions of others	

Unit 404   Manage budgets

UAN:	T/601/2580
Level:	Level 4
Credit value:	5
GLH:	29
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA533.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about managing and monitoring a budget for a department or section within an organisation.

Learning outcome	The learner will:
1. Understand the purpose of budgets	

Assessment criteria

The learner can:
1.1 Explain the purpose and benefits of managing financial resources effectively and efficiently
1.2 Identify legal, regulatory and organisational requirements for managing a budget
1.3 Describe different types of budgetary systems and their features

Learning outcome	The learner will:
2. Understand how to manage budgets	

Assessment criteria

The learner can:
2.1 Describe methods for monitoring, controlling and recording income and expenditure
2.2 Describe ways in which costs may be minimised in own area of responsibility
2.3 Identify situations in which corrective action may be needed
2.4 Describe the scope of own authority for managing a budget and authorising expenditure

Learning outcome	The learner will:
3. Understand how to report performance against budgets	
Assessment criteria	
The learner can: 3.1 Explain the purpose and benefits of reporting information on performance against budget 3.2 Explain how to check the accuracy of budget calculations 3.3 Explain the purpose and benefits of recording information that will help with the future preparation of budgets	

Learning outcome	The learner will:
4. Be able to monitor budgets	
Assessment criteria	
The learner can: 4.1 Control budget performance within limits and deadlines 4.2 Analyse and take action to minimise costs where possible 4.3 Take corrective action to make sure of best value for money 4.4 Authorise expenditure within the scope of own authority	

Learning outcome	The learner will:
5. Be able to monitor budgets	
Assessment criteria	
The learner can: 5.1 Record transactions, as required 5.2 Produce information on performance against budget, when required 5.3 Make sure all calculations are accurate 5.4 Record information that will help with the preparation of future budgets	

Unit 405   Prepare specifications for contracts

UAN:	F/601/2565
Level:	Level 4
Credit value:	5
GLH:	30
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAF132.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about understanding, and preparing the information that is needed to award a contract for work.

Learning outcome	The learner will:
1. Understand work contracts	

Assessment criteria

The learner can:

1.1 Explain the purpose and benefits of contracts and other forms of agreement
1.2 Describe different types of contracts and agreements
1.3 Evaluate different types of contract and agreement for their intended purpose
1.4 Explain the purpose of legal, regulatory and organisational requirements that may govern contracts
1.5 Identify a range of terminology used in contracts and explain its purpose
1.6 Explain the purpose and benefits of requirements and specifications in contracts

Learning outcome	The learner will:
2. Understand how to prepare for selection	

Assessment criteria

The learner can:

2.1 Explain the purpose and benefits of prioritising requirements
2.2 Explain the purpose and value of developing objective selection criteria

Learning outcome	The learner will:
3. Be able to prepare specifications for work	
Assessment criteria	
The learner can: 3.1 Identify requirements for contractor(s), consulting with others where required 3.2 Prioritise requirements and prepare specifications for the products and services to be provided, consulting with others where required	

Learning outcome	The learner will:
4. Be able to agree selection criteria	
Assessment criteria	
The learner can: 4.1 Prepare selection criteria 4.2 Agree selection criteria, where required	

Unit 406 Make decisions in a business environment

UAN:	H/601/2560
Level:	Level 4
Credit value:	4
GLH:	24
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAG122.
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about making decisions made in a business environment at the level where there is no requirement for formal legal or organisational procedures to be followed.

Learning outcome	The learner will:
1. Understand the purpose and process of decision-making	
Assessment criteria	
The learner can: 1.1 Evaluate situations where decision-making is required 1.2 Explain key stages in the decision-making process	

Learning outcome	The learner will:
2. Understand how to prepare to make decisions	
Assessment criteria	
The learner can: 2.1 Explain the purpose of knowing the context in which a decision is being made 2.2 Justify possible limitations on a person making decisions 2.3 Explain how to research information to be used to inform and influence decision-making 2.4 Evaluate sources of information that can be used to inform and influence decision-making	

Learning outcome	The learner will:
3. Understand how to make decisions	
Assessment criteria	
The learner can:	
3.1 Explain the purpose of meetings and other discussions where decisions are being made	
3.2 Explain how to structure own ideas, information and recommendations to maximise their effectiveness	
3.3 Explain the purpose and benefits of respecting other people's contributions to the decision-making process	
3.4 Explain how to be proactive and engage with colleagues during the decision-making process	
3.5 Justify the use of evidence, argument, questioning and assertiveness to influence outcomes	
3.6 Explain the purpose of collective responsibility	

Learning outcome	The learner will:
4. Understand how to assess decisions and their effects	
Assessment criteria	
The learner can:	
4.1 Evaluate ways to monitor the effect of decisions and identify learning points	
4.2 Explain how to review the decision-making process	

Learning outcome	The learner will:
5. Be able to prepare background information to make decisions	
Assessment criteria	
The learner can:	
5.1 Research and collect information to add value to the decision-making process	
5.2 Evaluate sources of information needed	

Learning outcome	The learner will:
6. Be able to make decisions	
Assessment criteria	
The learner can:	
6.1 Identify and agree criteria for making a decision	
6.2 Review information provided in order to make a decision	
6.3 Structure ideas, information and recommendations in a logical and meaningful way	
6.4 Present rationale and conclusions to others using accurate and current information	
6.5 Provide additional information to support conclusions	
6.6 Respond as required when asked to supply information to help with decision-making	
6.7 Respect other people's contributions to the decision-making process	

6.8	Use evidence, argument, questioning and assertiveness to justify decision(s)
6.9	Listen to other people's feedback and record for future evaluation
6.10	Confirm support for the decision(s)

Learning outcome	The learner will:
7. Be able to assess contributions to decision-making	
Assessment criteria	
The learner can:	
7.1 Assess contributions made to the decision-making process	
7.2 Identify learning points to improve future decision-making	

Unit 407 Chair meetings

UAN:	J/601/2566
Level:	Level 4
Credit value:	4
GLH:	16
Relationship to NOS:	This unit directly relates to the Business and Administration NOS BAA413
Assessment requirements specified by a sector or regulatory body:	This unit has been developed by the Council for Administration.
Aim:	This unit is about the role of the chairperson before, during and after business meetings.

Learning outcome	The learner will:
1. Understand the role of the chair in meetings	
Assessment criteria	
The learner can: 1.1 Explain the role of the chair before, during and after a meeting 1.2 Analyse different types of meetings and how to run them 1.3 Explain the purpose of preparing for formal meetings 1.4 Explain the reasons for agreeing the purpose of meetings 1.5 Explain the reasons for agreeing the timing of the meeting to make sure key people can attend or be represented 1.6 Describe how to chair meetings to keep to agreed timings, as required 1.7 Explain the reasons for giving people information about facilities and arrangements, including health and safety procedures 1.8 Explain the benefits of effective communication skills 1.9 Explain how effective interpersonal skills can impact on the success of meetings 1.10 Explain how to facilitate discussions so that the purpose of each agenda item is achieved 1.11 Explain how to summarise discussions and agree actions at appropriate points 1.12 Analyse techniques for keeping to meeting timings, agenda, and purpose 1.13 Explain reasons for liaising with meeting organiser if not the chair 1.14 Describe the types of problems that may occur when chairing meetings, and how to resolve them 1.15 Describe the purpose of approving records of meetings 1.16 Explain the purpose of follow up actions, and evaluation of meetings	

1.17	Explain the purpose of reflecting on whether the meeting met its purpose and agreeing learning points for the future

Learning outcome	The learner will:
2. Be able to prepare for chairing a meeting	
Assessment criteria	
The learner can:	

2.1 Agree the purpose of a meeting
2.2 Agree the scheduling of a meeting so that key people can attend
2.3 Make sure meeting facilities meet requirements
2.4 Agree agenda items for a meeting, including timing and any papers required to achieve purpose
2.5 Read briefing papers and identify key issues, consulting as required
2.6 Liaise with meeting organiser if not the chair of the meeting

Learning outcome	The learner will:
3. Be able to chair a meeting using interpersonal and organisational skills	
Assessment criteria	
The learner can:	

3.1 Greet people attending the meeting
3.2 Keep to timings as required
3.3 Give details of facilities and arrangements
3.4 Follow an agenda
3.5 Make sure those present have an opportunity to contribute to the meeting
3.6 Keep the meeting on track to achieve its purpose
3.7 Resolve any problems that occur
3.8 Summarise discussions and agree actions
3.9 Observe formal voting and approval procedures, if required
3.10 Agree date, time and location of next meeting, if required
3.11 Close the meeting on time

Learning outcome	The learner will:
4. Be able to follow up and evaluate a meeting that has been chaired	
Assessment criteria	
The learner can:	

4.1 Approve a meeting record and list of actions
4.2 Make sure agreed actions are implemented
4.3 Evaluate the outcomes of a meeting in terms of its purpose
4.4 Agree learning points for future meetings, if required

Appendix 1   Relationships to other qualifications

Links to other qualifications

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications.

These qualifications have connections to the:
- old Level 3 NVQ in Marketing (6763-03)
- new 6801 & 7711 in Sales
- new 4430 & 4417 in Customer Service
- new 3412 in Contact Centres

Literacy, language, numeracy and ICT skills development

These qualifications can develop skills that can be used in the following qualifications:
- Functional Skills (England) – see
  www.cityandguilds.com/functionalskills
- Essential Skills (Northern Ireland) – see
  www.cityandguilds.com/essentialskillsni
- Essential Skills Wales (from September 2010).

Appendix 2   Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on **www.cityandguilds.com**.

Providing City & Guilds qualifications – a guide to centre and qualification approval contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

- **Walled Garden**
  Find out how to register and certificate candidates on line

- **Events**
  Contains dates and information on the latest Centre events
- **Online assessment**
  Contains information on how to register for GOLA assessments.

Useful contacts

UK learners General qualification information	T: +44 (0)844 543 0033 E: **learnersupport@cityandguilds.com**
International learners General qualification information	T: +44 (0)844 543 0033 F: +44 (0)20 7294 2413 E: **intcg@cityandguilds.com**
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **centresupport@cityandguilds.com**
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: **singlesubjects@cityandguilds.com**
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **intops@cityandguilds.com**
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, GOLA, Navigation, User/menu option, Problems	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413 E: **walledgarden@cityandguilds.com**
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: **business_unit@cityandguilds.com**
Publications Logbooks, Centre documents, Forms, Free literature	T: +44 (0)844 543 0000 F: +44 (0)20 7294 2413

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As the UK's leading vocational education organisation, City & Guilds is leading the talent revolution by inspiring people to unlock their potential and develop their skills. We offer over 500 qualifications across 28 industries through 8500 centres worldwide and award around two million certificates every year. City & Guilds is recognised and respected by employers across the world as a sign of quality and exceptional training.

City & Guilds Group

The City & Guilds Group operates from three major hubs: London (servicing Europe, the Caribbean and Americas), Johannesburg (servicing Africa), and Singapore (servicing Asia, Australia and New Zealand). The Group also includes the Institute of Leadership & Management (management and leadership qualifications), City & Guilds Land Based Services (land-based qualifications), the Centre for Skills Development (CSD works to improve the policy and practice of vocational education and training worldwide) and Learning Assistant (an online e-portfolio).

Published by City & Guilds, a registered charity established to promote education and training

City & Guilds
5-6 Giltspur Street
London EC1A 9DE
T +44 (0)844 543 0000
F +44 (0)20 7294 2413
www.cityandguilds.com

WW-02-7712