



Learner
Achievement
Portfolio

Level 2 Diploma in Team Leading – Group A

Qualification
Accreditation Number:
601/3548/7
Version AIQ004417

Active iQ

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Active IQ Level 2 Diploma in Team Leading

Qualification Accreditation Number: 601/3548/7

Personal details

Learner's name:

Workplace:

Workplace address:

Workplace telephone number:

Assessor's name:

Assessor's telephone number:

Assessor's email:

Introduction

Welcome to the **Active IQ Level 2 Diploma in Team Leading**

This document is designed to assist you in gathering evidence to prove your competence against the standards in each of your chosen units. Your work-based assessor will provide you with guidance and support and help you decide on the best types of evidence to produce to prove competence.

When you start the qualification, your work-based assessor will usually help you to:

- Identify what you can do already
- Agree on the standard and level you are aiming for
- Analyse what you need to learn
- Choose and agree on activities that allow you to learn what you need

Assessment is normally through on-the-job observation and questioning. You will produce evidence to prove you have the competence to meet the qualification's standards. Your assessor will sign off units when they believe you are ready. The assessor will test your knowledge, understanding and work-based performance to make sure you can demonstrate competence in the workplace.

When planning assessments assessors will use a range of methods appropriate to you and required by the awarding body to assess you against the standards. The various methods of assessment that can be used are:

- Direct observation of you in the workplace
- Professional discussion
- Questioning
- Examination of workplace products you have produced
- Witness testimony
- Simulation (where allowed)
- DVD / Audio

Your assessor will explain all of these different methods to you.

You will compare your performance with the standards as you learn. You will look at what you have achieved, how much you still need to do and how you should go about it until you are assessed as competent for a unit. The qualification is suited to those who already have skills and want to develop them.

Active IQ Level 2 Diploma in Team Leading

You must achieve a minimum of 40 credits.

You must complete all five units in Mandatory Group A (22 credits), a minimum of 12 credits from Optional Group B and a maximum of 6 credits from Optional Group C.

Unit		Accreditation number	Level	Credit
Mandatory units (Group A) You must complete all five units (22 credits)				
1.	Manage personal performance and development	L/506/1788	2	4
2.	Communicate work-related information	T/506/1798	2	4
3.	Lead and manage a team	H/506/1800	2	5
4.	Principles of team leading	R/506/2294	2	5
5.	Understand business	R/506/2957	2	4
Optional units (Group B) You must achieve a minimum of 12 credits				
6.	Develop working relationships with colleagues	R/506/1789	2	3
7.	Contribute to meetings in a business environment	Y/506/2958	2	3
8.	Principles of equality and diversity in the workplace	J/506/1806	2	2
9.	Promote equality, diversity and inclusion in the workplace	T/506/1820	3	3
10.	Manage team performance	A/506/1821	3	4
11.	Manage individual's performance	J/506/1921	3	4
12.	Chair and lead meetings	Y/506/1924	3	3
13.	Encourage innovation	J/506/2292	3	4
14.	Manage conflict within a team	K/506/1927	3	5
15.	Procure products and/or services	M/506/1928	3	5
16.	Collaborate with other departments	M/506/1931	3	3
17.	Participate in a project	F/506/1934	3	3
Optional units (Group C) You may achieve a maximum of 6 credits				
18.	Health and safety procedures in the workplace	T/505/4673	2	2
19.	Store and retrieve information	R/506/1811	2	4
20.	Handle mail	D/506/1813	2	3
21.	Employee rights and responsibilities	L/506/1905	2	2
22.	Deliver customer service	A/506/2130	2	5
23.	Understand customers	F/506/2131	2	2
24.	Resolve customer service problems	A/506/2158	2	5
25.	Negotiate in a business environment	H/506/1912	3	4
26.	Develop a presentation	K/506/1913	3	3
27.	Deliver a presentation	M/506/1914	3	3
28.	Resolve customer complaints	R/506/2151	3	4

Learners may only complete one unit from each row.

Barred units	
This unit	Is barred against this unit
Unit 7 Contribute to meetings in a business environment (Y/506/2958)	Unit 12 Chair and lead meetings (Y/506/1924)
Unit 8 Principles of equality and diversity in the workplace (J/506/1806)	Unit 9 Promote equality, diversity and inclusion in the workplace (T/506/1820)

Witness/Assessor Status List

Please ensure anybody who has made an assessment decision or provided a witness testimony within your portfolio has completed the witness/ assessor list

Witness name and address	Status of Witness (See key below)	Relationship to learner	Signature

Witness Status Key:

1. Qualified Assessor, occupationally competent and familiar with standards
2. Qualified Assessor, not occupationally competent or familiar with standards
3. Occupationally competent, not an assessor (eg line manager)
4. Not occupationally competent, familiar with learner (eg customer)

Record of Achievement

Unit Name	Date Completed	Assessor Signature	IV Signature (if sampled)	Date	EV Signature (if sampled)	Date
Mandatory						
Optional Units						

Master Evidence Index

Evidence Number	Description
1.	
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Mandatory Group A

Unit 1

Title	Manage personal performance and development		
Level	2		
Credit	4		
Unit accreditation no.	L/506/1788		
Learning Outcomes The learner will:	↘	Initial	Evidence Reference
1. Be able to manage personal performance	1.1 Agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager		
	1.2 Agree criteria for measuring progress and achievement with line manager		
	1.3 Complete tasks to agreed timescales and quality standards		
	1.4 Report problems beyond their own level of competence and authority to the appropriate person		
	1.5 Take action needed to resolve any problems with personal performance		
2. Be able to manage their own time and workload	2.1 Plan and manage workloads and priorities using time management tools and techniques		
	2.2 Take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives		
	2.3 Explain the benefits of achieving an acceptable “work-life balance”		

3. Be able to identify their own development needs	<p>3.1 Identify organisational policies relating to personal development</p> <p>3.2 Explain the need to maintain a positive attitude to feedback on performance</p> <p>3.3 Explain the potential business benefits of personal development</p> <p>3.4 Identify their own preferred learning style(s)</p> <p>3.5 Identify their own development needs from analyses of the role, personal and team objectives</p> <p>3.6 Use feedback from others to identify their own development needs</p> <p>3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs</p>			
4. Be able to fulfil a personal development plan	<p>4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms</p> <p>4.2 Make use of formal development opportunities that are consistent with business needs</p> <p>4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives</p> <p>4.4 Review progress against agreed objectives and amend plans accordingly</p> <p>4.5 Share lessons learned with others using agreed communication methods</p>			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 2

Communicate work-related information				
Level		2		
Credit		4		
Unit accreditation no.		T/506/1798		
Learning Outcomes The learner will:		Assessment Criteria The learner can:	▼	Initial
1. Understand the principles and techniques of work-related communication	1.1 Describe communication techniques used to gain and maintain the attention and interest of an audience			
	1.2 Explain the principles of effective written business communications			
	1.3 Explain the principles of effective verbal communications in a business environment			
	1.4 Describe the importance of checking the accuracy and currency of information to be communicated			
	1.5 Describe the importance of explaining to others the level of confidence that can be placed on the information being communicated			
	1.6 Describe the advantages and disadvantages of different methods of communication for different purposes			
	2. Be able to communicate work-related information verbally	2.1 Identify the information to be communicated		
2.2 Confirm that the audience is authorised to receive the information				
2.3 Provide accurate information, using appropriate verbal communication techniques				
2.4 Communicate in a way that the listener can understand, using language that is appropriate to the topic				
2.5 Confirm that the listener has understood what has been communicated				

3. Be able to communicate work-related information in writing	3.1 Identify the information to be communicated			
	3.2 Provide accurate information using the appropriate written communication methods and house styles			
	3.3 Adhere to any organisational confidentiality requirements when communicating in writing			
	3.4 Use correct grammar, spelling, sentence structure and punctuation, using accepted business communication principles and formats			
	3.5 Justify opinions and conclusions with evidence			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 3

Title	Lead and manage a team		
Level	2		
Credit	4		
Unit accreditation no.	H/506/1800		
Learning Outcomes The learner will:	✓	Initial	Evidence Reference
1. Be able to engage and support team members	1.1 Explain organisational policies, procedures, values and expectations to team members		
	1.2 Communicate work objectives, priorities and plans in line with operational requirements		
	1.3 Explain the benefits of encouraging suggestions for improvements to work practices		
	1.4 Provide practical support to team members facing difficulties		
	1.5 Explain the use of leadership techniques in different circumstances		
	1.6 Give recognition for achievements, in line with organisational policies		
	1.7 Explain different ways of motivating people to achieve business performance targets		

2. Be able to manage team performance	2.1 Allocate responsibilities making best use of the expertise within the team			
	2.2 Agree with team member(s) specific, measurable objectives (SMART) in line with business needs			
	2.3 Provide individuals with resources to achieve the agreed objectives			
	2.4 Monitor individuals' progress, providing support and feedback to help them achieve their objectives			
	2.5 Explain techniques to monitor individuals' performance			
	2.6 Report on team performance in line with organisational requirements			
	3. Be able to deal with problems within a team	3.1 Assess actual and potential problems and their consequences		
3.2 Report problems beyond the limits of their own competence and authority to the right person				
3.3 Take action within the limits of their own authority to resolve or reduce conflict				
3.4 Adapt practices and processes as circumstances change				
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed for this unit except as detailed below. Simulation may be used for all assessment criteria in learning outcome 3 in exceptional circumstances if no naturally occurring evidence is available.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 4

Title	Principles of team leading		
Level	2		
Credit	5		
Accreditation No	R/506/2294		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand leadership styles in organisations	1.1 Describe characteristics of effective leaders		WORKSHEET
	1.2 Describe different leadership styles		
	1.3 Describe ways in which leaders can motivate their teams		
	1.4 Explain the benefits of effective leadership for organisations		

<p>2. Understand team dynamics</p>	<p>2.1 Explain the purpose of different types of teams</p>			
	<p>2.2 Describe the stages of team development and behaviour</p>			
	<p>2.3 Explain the concept of team role theory</p>			
	<p>2.4 Explain how the principle of team role theory is used in team building and leadership</p>			
	<p>2.5 Explain typical sources of conflict within a team and how they could be managed</p>			
<p>3. Understand techniques used to manage the work of teams</p>	<p>3.1 Explain the factors to be taken into account when setting targets</p>			
	<p>3.2 Describe a range of techniques to monitor the flow of work of a team</p>			
	<p>3.3 Describe techniques to identify and solve problems within a team</p>			

4. Understand the impact of change management within a team	4.1 Describe typical reasons for organisational change			
	4.2 Explain the importance of accepting change positively			
	4.3 Explain the potential impact on a team of negative responses to change			
	4.4 Explain how to implement change within a team			
5. Understand team motivation	5.1 Explain the meaning of the term "motivation"			
	5.2 Explain factors that affect the level of motivation of team members			
	5.3 Describe techniques that can be used to motivate team members			
	5.4 Explain how having motivated staff affects an organisation			
Evidence Requirements				
This is a knowledge based unit. Please see worksheet section at the end of Mandatory Group A				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 5

Title		Understand business	
Level		2	
Credit		4	
Unit accreditation no.		R/506/2957	
Assessment Criteria The learner will:		Initial Evidence Reference	
Learning Outcomes The learner will:		Initial Evidence Reference	
1. Understand organisational structures	1.1 Explain the differences between the private sector, the public sector and the voluntary sector		WORKSHEET
	1.2 Explain the features and responsibilities of different business structures		
	1.3 Explain the relationship between an organisation's vision, mission, strategy and objectives		
	2.1 Describe the internal and external influences on a business		
	2.2 Explain the structure and use of a strength, weakness, opportunity and threat (SWOT) analysis		
	2.3 Explain why change can be beneficial to business organisations		
2. Understand the business environment	2.4 Explain organisations health and safety responsibilities		
	2.5 Describe sustainable ways of working		
	2.6 Explain how legislation affects the management and confidentiality of information		

3. Understand the principles of business planning and finance within an organisation	3.1 Explain the purpose, content and format of a business plan				
	3.2 Explain the business planning cycle				
	3.3 Explain the purpose of a budget				
	3.4 Explain the concept and importance of business risk management				
	3.5 Explain types of constraint that may affect a business plan				
	3.6 Define a range of financial terminology				
	3.7 Explain the purposes of a range of financial reports				
4. Understand business reporting within an organisation	4.1 Explain methods of measuring business performance				
	4.2 Explain the uses of management information and reports				
	4.3 Explain how personal and team performance data is used to inform management reports				
	4.4 Describe a manager's responsibility for reporting to internal stakeholders				
5. Understand the principles of management responsibilities and accountabilities within an organisation	5.1 Explain the principle of accountability in an organisation				
	5.2 Explain the difference between 'authority' and 'responsibility'				
	5.3 Explain the meaning of delegated levels of authority and responsibility				
Evidence Requirements					
This is a knowledge based unit. Please see worksheet section at the end of Mandatory Group A					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

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Optional Group B

Unit 6

Title	Develop working relationships with colleagues		
Level	2		
Credit	3		
Unit accreditation no.	R/506/1789		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the principles of effective team working	1.1 Outline the benefits of effective team working		
	1.2 Describe how to give feedback constructively		
	1.3 Explain conflict management techniques that may be used to resolve team conflicts		
	1.4 Explain the importance of giving team members the opportunity to discuss work progress and any issues arising		
	1.5 Explain the importance of warning colleagues of problems and changes that may affect them		
2. Be able to maintain effective working relationships with colleagues	2.1 Recognise the contribution of colleagues to the achievement of team objectives		
	2.2 Treat colleagues with respect, fairness and courtesy		
	2.3 Fulfil agreements made with colleagues		
	2.4 Provide support and constructive feedback to colleagues		

3. Be able to collaborate with colleagues to resolve problems	3.1 Take others' viewpoints into account when making decisions			
	3.2 Take ownership of problems within own level of authority			
	3.3 Take action to minimise disruption to business activities within their own level of authority			
	3.4 Resolve problems within their own level of authority and agreed contribution			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 7

Title	Contribute to meetings in a business environment		
Level	2		
Credit	3		
Unit accreditation no.	Y/506/2958		
Learning Outcomes The learner will:	✓	Initial	Evidence Reference
1. Be able to prepare for meetings	1.1	Explain the structure and purpose of different types of meetings in a business environment	
	1.2	Explain the importance of having a meeting agenda which addresses objectives	
	1.3	Obtain current versions of documents required for the meeting	
	1.4	Gather information from relevant people in preparation for meetings	
	1.5	Confirm the objectives to be achieved during the meeting	
	2. Be able to participate in meetings	2.1	Present views and information, providing evidence to support the case
2.2		Represent the views of those consulted	
2.3		Take others' viewpoints into account in decision-making	
2.4		Identify issues that may have an impact on their area of responsibility	
2.5		Make constructive contributions in line with business objectives	
2.6		Summarise future actions and accountabilities	

3. Be able to carry out post-meeting activities	3.1 Carry out agreed actions post-meeting within the agreed timescale			
	3.2 Identify areas for improvements by reflecting on personal contributions to meetings			
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>				
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 8

Title	Principles of equality and diversity in the workplace		
Level	2		
Credit	2		
Unit accreditation no.	J/506/1806		
Learning Outcomes The learner will:	✓	Initial	Evidence Reference
The learner can:			
1. Understand the implications of equality legislation	1.1 Define the concept 'equality and diversity'		WORKSHEET
	1.2 Describe the legal requirements for equality of opportunity		
	1.3 Describe the role and powers of organisations responsible for equality		
	1.4 Explain the benefits of equal opportunities and diversity		
	1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation		
2. Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1 Explain how organisational policies on equality and diversity translate into day to day activity in the workplace		
	2.2 Describe their own responsibilities for equality and diversity in the workplace		
	2.3 Describe behaviours that support equality, diversity and inclusion in the workplace		
Evidence Requirements	This is a knowledge based unit. Please see worksheet section at the end of Optional Group B.		

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit


Assessor's signature:

Date:

IV's signature:

Date:

Unit 9

Title		Promote equality, diversity and inclusion in the workplace		
Level		3		
Credit		3		
Unit accreditation no.		T/506/1820		
Learning Outcomes The learner will:		Assessment Criteria The learner can: 		
1. Understand the organisational aspects of equality, diversity and inclusion in the workplace	1.1	Explain the difference between equality, diversity and inclusion		
	1.2	Explain the impact of equality, diversity and inclusion across aspects of organisational policy		
	1.3	Explain the potential consequences of breaches of equality legislation		
	1.4	Describe nominated responsibilities within an organisation for equality, diversity and inclusion		
2. Understand the personal aspects of equality, diversity and inclusion in the workplace	2.1	Explain the different forms of discrimination and harassment		
	2.2	Describe the characteristics of behaviour that supports equality, diversity and inclusion in the workplace		
	2.3	Explain the importance of displaying behaviour that supports equality, diversity and inclusion in the workplace		
3. Be able to support equality, diversity and inclusion in the workplace	3.1	Ensure colleagues are aware of their responsibilities for equality, diversity and inclusion in the workplace		
	3.2	Identify potential issues relating to equality, diversity and inclusion in the workplace		
	3.3	Adhere to organisational policies and procedures, and legal and ethical requirements when supporting equality, diversity and inclusion in the workplace		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 10

Title		Manage team performance		
Level		3		
Credit		4		
Unit accreditation no.		A/506/1821		
Learning Outcomes The learner will:		Assessment Criteria The learner can:		
1. Understand the management of team performance	1.1	Explain the use of benchmarks in managing performance		
	1.2	Explain a range of quality management techniques to manage team performance		
	1.3	Describe constraints on the ability to amend priorities and plans		
2. Be able to allocate and assure the quality of work	2.1	Identify the strengths, competences and expertise of team members		
	2.2	Allocate work on the basis of the strengths, competences and expertise of team members		
	2.3	Identify areas for improvement in team members' performance outputs and standards		
	2.4	Amend priorities and plans to take account of changing circumstances		
	2.5	Recommend changes to systems and processes to improve the quality of work		

3. Be able to manage communications within a team	3.1 Explain to team members the lines of communication and authority levels			
	3.2 Communicate individual and team objectives, responsibilities and priorities			
	3.3 Use communication methods that are appropriate to the topics, audience and timescales			
	3.4 Provide support to team members when they need it			
	3.5 Agree with team members a process for providing feedback on work progress and any issues arising			
	3.6 Review the effectiveness of team communications and make improvements			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 11

Manage individuals' performance					
3					
4					
J/506/1921					
Assessment Criteria		▼	Initial	Evidence Reference	
The learner will:					
1. Understand the management of underperformance in the workplace	1.1 Explain typical organisational policies and procedures on discipline, grievance and dealing with underperformance				
	1.2 Explain how to identify causes of underperformance				
	1.3 Explain the purpose of making individuals aware of their underperformance clearly but sensitively				
	1.4 Explain how to address issues that hamper individuals' performance				
	1.5 Explain how to agree a course of action to address underperformance				
	2. Be able to manage individuals' performance in the workplace	2.1 Agree with team members specific, measurable, achievable, realistic and time-bound (SMART) objectives that align to organisational objectives			
		2.2 Delegate responsibility to individuals on the basis of their expertise, competence, skills, knowledge, and development needs			
2.3 Apply motivation techniques to maintain morale					
2.4 Provide information, resources and on-going mentoring to help individuals meet their targets, objectives and quality standards					
2.5 Monitor individuals' progress towards objectives in accordance with agreed plans					
2.6 Recognise individuals' achievement of targets and quality standards					
2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when managing individuals' performance in the workplace					

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 12

Title	Chair and lead meetings		
Level	3		
Credit	3		
Unit accreditation no.	Y/506/1924		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Be able to prepare to lead meetings	1.1 Identify the type, purpose, objectives, and background to a meeting		
	1.2 Identify those individuals expected, and those required to attend a meeting		
	1.3 Prepare for any formal procedures that apply to a meeting		
	1.4 Describe ways of minimising likely problems in a meeting		
	1.5 Take action to ensure that meeting documentation is prepared correctly and distributed to the agreed people within the agreed timescale		
2. Be able to chair and lead meetings	2.1 Follow business conventions in the conduct of a meeting		
	2.2 Facilitate meetings so that everyone is involved and the optimum possible consensus is achieved		
	2.3 Manage the agenda within the timescale of the meeting		
	2.4 Summarise the agreed actions, allocated responsibilities, timescales and any future arrangements		
3. Be able to deal with post-meeting matters	3.1 Take action to ensure that accurate records of a meeting are produced and distributed in the agreed format and timescale		
	3.2 Take action to ensure that post-meeting actions are completed		
	3.3 Evaluate the effectiveness of a meeting and identify points for future improvement		

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

Date:

IV's signature:

Date:

Unit 13

Title		Encourage innovation		
Level		3		
Credit		4		
Unit accreditation no.		J/506/2292		
Learning Outcomes The learner will:		Assessment Criteria The learner can:		
<p>1. Be able to identify opportunities for innovation</p>		1.1	Analyse the advantages and disadvantages of techniques used to generate ideas	
		1.2	Explain how innovation benefits an organisation	
		1.3	Explain the constraints on their own ability to make changes	
		1.4	Agree with stakeholders terms of reference and criteria for evaluating potential innovation and improvement	
		1.5	Engage team members in finding opportunities to innovate and suggest improvements	
		1.6	Monitor performance, products and/or services and developments in areas that may benefit from innovation	
		1.7	Analyse valid information to identify opportunities for innovation and improvement	
		<p>2. Be able to generate and test ideas for innovation and improvement</p>		2.1
2.2	Test selected ideas that meet viability criteria			
2.3	Evaluate the fitness for purpose and value of the selected ideas			
2.4	Assess potential innovations and improvements against the agreed evaluation criteria			
		Initial	Evidence	Reference

<p>3. Be able to implement innovative ideas and improvements</p>	<p>3.1 Explain the risks of implementing innovative ideas and improvements</p>			
	<p>3.2 Justify conclusions of efficiency and value with evidence</p>			
	<p>3.3 Prepare costings and schedules of work that will enable efficient implementation</p>			
	<p>3.4 Design processes that support efficient implementation</p>			
	<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>			
<p>Simulation Simulation is not allowed.</p>				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 14

Title		Manage conflict within a team		
Level		3		
Credit		5		
Unit accreditation no.		K/506/1927		
Learning Outcomes The learner will:		Assessment Criteria The learner can:		
		Initial		
		Evidence Reference		
1. Understand the principles of conflict management		1.1 Evaluate the suitability of different methods of conflict management in different situations		
		1.2 Describe the personal skills needed to deal with conflict between other people		
		1.3 Analyse the potential consequences of unresolved conflict within a team		
		1.4 Explain the role of external arbitration and conciliation in conflict resolution		
2. Be able to reduce the potential for conflict within a team		2.1 Communicate to team members their roles, responsibilities, objectives and expected standards of behaviour		
		2.2 Explain to team members the constraints under which other colleagues work		
		2.3 Review systems, processes, situations and structures that are likely to give rise to conflict in line with organisational procedures		
		2.4 Take action to minimise the potential for conflict within the limits of their own authority		
		2.5 Explain how team members' personalities and cultural backgrounds may give rise to conflict		

3. Be able to deal with conflict within a team	3.1 Assess the seriousness of conflict and its potential impact			
	3.2 Treat everyone involved with impartiality and sensitivity			
	3.3 Decide a course of action that offers optimum benefits			
	3.4 Explain the importance of engaging team members' support for the agreed actions			
	3.5 Communicate the actions to be taken to those who may be affected by it			
	3.6 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with conflict within a team			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation may be used for all learning outcomes and assessment criteria if no naturally occurring evidence is available				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 15

Title		Procure products and/or services		
Level		3		
Credit		5		
Unit accreditation no.		M/506/1928		
Learning Outcomes The learner will:		✓		
Assessment Criteria The learner can:		Initial Evidence Reference		
1. Be able to identify procurement requirements	1.1 Explain current and likely future procurement requirements			
	1.2 Decide whether the purchase of products and/or services offers the organisation best value			
	1.3 Evaluate ethical and sustainability considerations relating to procurement			
	1.4 Justify the decision to buy products and/or services with evidence of an analysis of risk, costs and benefits			
2. Be able to select suppliers	2.1 Explain the factors to be taken into account in selecting suppliers			
	2.2 Explain organisational procurement policies, procedures and standards			
	2.3 Explain the effect of supplier choice on the supply chain			
	2.4 Use appropriate media to publicise procurement requirements			
	2.5 Confirm the capability and track record of suppliers and their products and/or services			
	2.6 Select suppliers that meet the procurement specification			

3. Be able to buy products and/or services	3.1 Explain the action to be taken in the event of problems arising			
	3.2 Agree contract terms that are mutually acceptable within their own scope of authority			
	3.3 Record agreements made, stating the specification, contract terms and any post-contract requirements			
	3.4 Adhere to organisational policies and procedures, legal and ethical requirements			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 16

Title	Collaborate with other departments		
Level	3		
Credit	3		
Unit accreditation no.	M/506/1931		
Learning Outcomes The learner will:	✓	Initial	Evidence Reference
1. Understand how to collaborate with other departments	1.1	Explain the need for collaborating with other departments	
	1.2	Explain the nature of the interaction between their own team and other departments	
	1.3	Explain the features of effective collaboration	
	1.4	Explain the potential implications of ineffective collaboration with other departments	
	1.5	Explain the factors relating to knowledge management that should be considered when collaborating with other departments	
2. Be able to identify opportunities for collaboration with other departments	2.1	Analyse the advantages and disadvantages of collaborating with other departments	
	2.2	Identify with which departments collaborative relationships should be built	
	2.3	Identify the scope for and limitations of possible collaboration	
3. Be able to collaborate with other departments	3.1	Agree Service Level Agreements (SLAs), objectives and priorities of collaborative arrangements	
	3.2	Work with other departments in a way that contributes to the achievement of organisational objectives	

Evidence Requirements

Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.

Simulation

Simulation is not allowed.

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 17

Title	Participate in a project		
Level	3		
Credit	3		
Unit accreditation no.	F/506/1934		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to manage a project	1.1 Explain the features of a project business case		
	1.2 Explain the stages of a project lifecycle		
	1.3 Explain the roles of people involved in a project		
	1.4 Explain the uses of project-related information		
	1.5 Explain the advantages and limitations of different project monitoring techniques		
	1.6 Analyse the interrelationship of project scope, schedule, finance, risk, quality and resources		
2. Be able to support the delivery of a project	2.1 Fulfil their role in accordance with a project plan		
	2.2 Collect project-related information in accordance with project plans		
	2.3 Use appropriate tools to analyse project information		
	2.4 Report on information analysis in the agreed format and timescale		
	2.5 Draw issues, anomalies and potential problems to the attention of project managers		

	2.6 Adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project			
Evidence of real work activity Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation Simulation is not allowed for this unit except as detailed below. Simulation may be used for assessment criteria 2.5 if no naturally occurring evidence is available.				
Supplementary evidence Supplementary evidence such as questioning may be used for assessment criteria 2.5 if no naturally occurring evidence is available.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Optional Group C

Unit 18

Title	Health and safety procedures in the workplace		
Level	2		
Credit	2		
Unit accreditation no.	T/505/4673		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Know health and safety procedures in the workplace	<p>1.1 Define the main responsibilities for health and safety in the workplace of the following:</p> <p>a) employers</p> <p>b) employees</p> <p>1.2 Describe two health and safety laws affecting the workplace</p> <p>1.3 Define the importance of following health and safety procedures in the workplace</p> <p>1.4 Define the types of information or support available in relation to a specified aspect of health and safety in the workplace</p>		
2. Be able to carry out tasks with regard to health and safety in the workplace	<p>2.1 Carry out a risk assessment of a specified workplace activity</p> <p>2.2 Use equipment or tools safely in the workplace</p> <p>2.3 Describe how to prevent accidents in the workplace</p> <p>2.4 Assess how own health and safety practices could be improved.</p>		
Evidence Requirements			
There are no specific evidence requirements for this unit. The criteria can be met through a combination of assessor observations, witness testimony and/or authentic records of the learner's work.			
Simulation			
Simulation is not allowed.			

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

Assessor's signature:

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Unit 19

Title	Store and retrieve information		
Level	2		
Credit	4		
Accreditation No	R/506/1811		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand information storage and retrieval	1.1 Describe systems and procedures for storing and retrieving information		
	1.2 Outline legal and organisational requirements for information security and retention		
	1.3 Explain how to create filing systems to facilitate information identification and retrieval		
	1.4 Explain how to use different search techniques to locate and retrieve information		
	1.5 Describe what to do when problems arise when storing or retrieving information		

2. Be able to gather and store information	2.1 Gather the information required within the agreed timescale				
	2.2 Store files and folders in accordance with organisational procedures				
	2.3 Store information in approved locations				
	2.4 Adhere to organisational policies and procedures, legal and ethical requirements				
3. Be able to retrieve information	3.1 Confirm information to be retrieved and its intended use				
	3.2 Retrieve the required information within the agreed timescale				
Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.					
Simulation Simulation is not allowed.					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 20

Title	Handle mail		
Level	2		
Credit	3		
Accreditation No	D/506/1813		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to deal with mail	1.1 Explain how to deal with “junk” mail		
	1.2 Describe what to do in the event of problems arising when dealing with incoming or outgoing mail		
	1.3 Describe how to operate a franking machine		
	1.4 Explain how to prepare packages for distribution		
	1.5 State organisational policies and procedures on mail handling, security and the use of courier services		
	1.6 Explain the process for reporting suspicious or damaged items in accordance with organisational procedures		

2. Be able to deal with incoming mail	2.1 Sort incoming mail in line with organisational procedures				
	2.2 Distribute incoming mail and packages to the right people according to the agreed schedule				
	2.3 Deal with incorrectly addressed and “junk” mail in accordance with organisational procedures				
3. Be able to deal with outgoing mail	3.1 Organise the collection of outgoing mail and packages on time				
	3.2 Identify the best option for dispatching mail according to the required degree of urgency, size and value of the item				
	3.3 Dispatch outgoing mail on time				
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>					
<p>Simulation Simulation is not allowed.</p>					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 21

Title		Employee rights and responsibilities			
Level		2			
Credit		2			
Unit accreditation no.		L/506/1905			
Assessment Criteria					
The learner can:					
1. Understand the role of organisations and industries	1.1	Explain the role of their own occupation within an organisation and industry			WORKSHEET
	1.2	Describe career pathways within their organisation and industry			
	1.3	Identify sources of information and advice on an industry, occupation, training and career pathway			
	1.4	Describe an organisation's principles of conduct and codes of practice			
	1.5	Explain issues of public concern that affect an organisation and industry			
	1.6	Describe the types, roles and responsibilities of representative bodies and their relevance to their own role			
	2. Understand employers' expectations and employees' rights and obligations	2.1	Describe the employer and employee statutory rights and responsibilities that affect their own role		
2.2		Describe an employer's expectations for employees' standards of personal presentation, punctuality and behaviour			
2.3		Describe the procedures and documentation that protect relationships with employees			
2.4		Identify sources of information and advice on employment rights and responsibilities			
Evidence Requirements					
This is a knowledge based unit. Please see worksheet section at the end of Optional Group C.					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 22

Title	Deliver customer service		
Level	2		
Credit	5		
Unit accreditation no.	A/506/2130		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand customer service delivery	<p>1.1 Explain the relationship between customers' needs and expectations and customer satisfaction</p> <p>1.2 Describe the features and benefits of an organisation's products and/or services</p> <p>1.3 Explain the importance of treating customers as individuals</p> <p>1.4 Explain the importance of balancing promises made to customers with the needs of an organisation</p> <p>1.5 Explain when and to whom to escalate problems</p> <p>1.6 Describe methods of measuring their own effectiveness in the delivery of customer service</p>		
2. Understand the relationship between customer service and a brand	<p>2.1 Explain the importance of a brand to an organisation</p> <p>2.2 Explain how a brand affects an organisation's customer service offer</p> <p>2.3 Explain the importance of using customer service language that supports a brand promise</p> <p>2.4 Identify their own role in ensuring that a brand promise is delivered</p>		

<p>3. Be able to prepare to deal with customers</p>	<p>3.1 Keep up to date with an organisation's products and/or services</p> <p>3.2 Prepare resources that are necessary to deal with customers before starting work</p>	<p>4. Be able to provide customer service</p>	<p>4.1 Maintain organisational standards of presentation and behaviour when providing customer service</p> <p>4.2 Adapt their own behaviour to meet customers' needs or expectations</p>						
			<p>4.3 Respond to customers' requests in line with organisational guidelines</p> <p>4.4 Inform customers of the progress of their requests</p>						
<p>5. Be able to support improvements to customer service delivery</p>	<p>4.5 Confirm that customers' expectations have been met in line with the service offer</p> <p>4.6 Adhere to organisational policies and procedures, legal and ethical requirements when providing customer service</p> <p>5.1 Identify ways that customer service could be improved for an organisation and individuals</p> <p>5.2 Share information and ideas with colleagues and/or service partners to support the improvement of service delivery</p>								
<p>Evidence Requirements</p>									
<p>Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>									
<p>Simulation</p>									
<p>Simulation is not allowed.</p>									

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 23

Understand customers					
2					
2					
F/506/2131					
Assessment Criteria The learner can:		▼		Initial	Evidence Reference
1. Understand different types of customers	1.1 Explain the distinctions between internal and external customers				WORKSHEET
	1.2 Explain how cultural factors can affect customers' expectations				
	1.3 Describe the characteristics of challenging customers				
	1.4 Explain how to identify dissatisfied customers				
	2.1 Explain how the achievement of the customer service offer contributes to enhancing customer loyalty				
2. Understand the value of customers and their loyalty	2.2 Explain the relationship between customer satisfaction and organisational performance				
	2.3 Explain how the reputation and image of an organisation affects customers' perceptions of its products and/or services				
	2.4 Explain the potential consequences of customers' dissatisfaction				
	2.5 Describe different methods of attracting customers and retaining their loyalty				
	Evidence Requirements				
This is a knowledge based unit. Please see worksheet section at the end of Mandatory Group C.					

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 24

Title	Resolve customer service problems		
Level	2		
Credit	5		
Unit accreditation no.	A/506/2158		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the resolution of customer service problems	1.1 Describe the organisation's customer service and complaints procedures		
	1.2 Describe techniques to identify customer service problems and their causes		
	1.3 Describe techniques to deal with situations where customers become agitated or angry		
	1.4 Explain the limits of their own authority for resolving customers' problems and making promises		
	1.5 Explain the purpose of encouraging customers to provide feedback		
	1.6 Describe methods used to encourage customers to provide feedback		

2. Be able to resolve customer service problems	2.1 Identify the nature and cause of customer service problems			
	2.2 Identify workable options for resolving problems within organisational guidelines			
	2.3 Use the most appropriate method of communication for dealing with customers			
	2.4 Agree with customers the option that best meets their needs and those of the organisation			
	2.5 Keep customers informed of progress			
	2.6 Fulfil promises made to customers during the resolution process			
	2.7 Share customer feedback with others to improve the resolution of customer service problems			
	2.8 Adhere to organisational policies and procedures, legal and ethical requirements when resolving customer service problems			
	3. Be able to manage unresolved customer service problems	3.1 Explain to customers the reasons why problems cannot be resolved		
3.2 Refer customers to other sources of help if their problems cannot be resolved				
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 25

Title	Negotiate in a business environment		
Level	3		
Credit	4		
Unit accreditation no.	H/506/1912		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the principles underpinning negotiation	1.1 Describe the requirements of a negotiation strategy		
	1.2 Explain the use of different negotiation techniques		
	1.3 Explain how research on the other party can be used in negotiations		
	1.4 Explain how cultural differences might affect negotiations		
2. Be able to prepare for business negotiations	2.1 Identify the purpose, scope and objectives of the negotiation		
	2.2 Explain the scope of their own authority for negotiating		
	2.3 Prepare a negotiating strategy		
	2.4 Prepare fall-back stances and compromises that align with the negotiating strategy and priorities		
	2.5 Assess the likely objectives and negotiation stances of the other party		
	2.6 Research the strengths and weaknesses of the other party		

3. Be able to carry out business negotiations	3.1 Carry out negotiations within responsibility limits in a way that optimises opportunities			
	3.2 Adapt the conduct of the negotiation in accordance with changing circumstances			
	3.3 Maintain accurate records of negotiations, outcomes and agreements made			
	3.4 Adhere to organisational policies and procedures, and legal and ethical requirements when carrying out business negotiations			
Evidence Requirements				
Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation				
Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 26

Title	Develop a presentation		
Level	3		
Credit	3		
Accreditation No	K/506/1913		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand how to develop a presentation	1.1 Explain best practice in developing presentations		
	1.2 Explain who needs to be consulted on the development of a presentation		
	1.3 Explain the factors to be taken into account in developing a presentation		
	1.4 Analyse the advantages and limitations of different communication media		

2. Be able to develop a presentation	2.1 Identify the purpose, content, style, timing and audience for a presentation			
	2.2 Select a communication media that is appropriate to the nature of a presentation, message and audience			
	2.3 Tailor a presentation to fit the timescale and audience's needs			
	2.4 Prepare a presentation that is logically structured, summarises the content and addresses the brief			
	2.5 Take action to ensure that a presentation adheres to organisational guidelines and policies			
	2.6 Develop materials that support the content of a presentation			
Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.				
Simulation Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 27

Title	Deliver a presentation		
Level	3		
Credit	3		
Accreditation No	M/506/1914		
Learning Outcomes The learner will:	Assessment Criteria The learner can:		
1. Understand the principles underpinning the delivery of presentations	✓		
		1.1 Analyse the advantages and limitations of different methods of, and media for, making presentations	
		1.2 Explain how the type and size of the audience affects the delivery of a presentation	
		1.3 Explain the factors to be taken into account in developing contingency plans when delivering presentations	
		1.4 Explain voice projection and timing techniques when delivering presentations	
		1.5 Explain the factors to be taken into account in responding to questions from an audience	
		1.6 Explain different methods for evaluating the effectiveness of a presentation	
	Initial	Evidence	Reference

<p>2. Be able to prepare to deliver a presentation</p>	<p>2.1 Confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation</p> <p>2.2 Develop contingency plans for potential equipment and resource failure</p> <p>2.3 Take action to ensure that the presentation fits the time slot available</p>						
<p>3. Be able to deliver a presentation</p>	<p>3.1 Speak clearly and confidently, using language that is appropriate for the topic and the audience</p> <p>3.2 Vary their voice tone, pace and volume appropriately when delivering a presentation</p> <p>3.3 Use body language in a way that reinforces messages</p> <p>3.4 Use equipment and resources effectively when delivering a presentation</p> <p>3.5 Deliver a presentation within the agreed timeframe</p> <p>3.6 Respond to questions in a way that meets the audience's needs</p> <p>3.7 Evaluate the effectiveness of a presentation</p>						
<p>Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.</p>							
<p>Simulation Simulation is not allowed.</p>							

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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Unit 28

Title	Resolve customers' complaints		
Level	3		
Credit	4		
Unit accreditation no.	R/506/2151		
Learning Outcomes The learner will:	Assessment Criteria The learner can:	Initial	Evidence Reference
1. Understand the monitoring and resolution of customers' complaints	1.1 Assess the suitability of a range of monitoring techniques for customers' complaints		
	1.2 Explain how to identify those complaints that should prompt a review of the service offer and service delivery		
	1.3 Explain negotiating techniques used to resolve customers' complaints		
	1.4 Explain conflict management techniques used in dealing with upset customers		
	1.5 Explain organisational procedures for dealing with customer complaints		
	1.6 Explain when to escalate customers' complaints		
	1.7 Explain the cost and regulatory implications of admitting liability on the basis of a customer complaint		
	1.8 Explain the advantages and limitations of offering compensation or replacement products and/or services		

2. Be able to deal with customers' complaints	2.1 Confirm the nature, cause and implications of customers' complaints			
	2.2 Take personal responsibility for dealing with complaints			
	2.3 Communicate in a way that recognises customers' problems and understands their points of view			
	2.4 Explain the advantages and limitations of different complaint response options to customers			
	2.5 Explain the advantages and limitations of different complaint response options to the organisation			
	2.6 Keep customers informed of progress			
	2.7 Agree solutions with customers that address the complaint and which are within the limits of their own authority			
	2.8 Record the outcome of the handling of complaints for future reference			
	2.9 Adhere to organisational policies and procedures, legal and ethical requirements when dealing with customers' complaints			
	Evidence Requirements Evidence for this unit should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria.			
Simulation Simulation is not allowed.				

Assessor feedback

Below detail why, as the assessor, you feel the learner has achieved this unit

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