# ILM LEVEL 3 AWARD, CERTIFICATE AND DIPLOMA IN FIRST LINE MANAGEMENT (QCF)

[Award Qualification No. – 500/3586/1]
[Certificate Qualification No. – 500/3585/X]
[Diploma Qualification No. – 500/3587/3]

*Note: This qualification specification should always be read in conjunction with the "Supporting Notes for ILM VRQs" document which is downloadable from ILM website or it can be accessed via your Quality Manager/External Verifier or from the ILM Customer Services Team by emailing at customer@i-l-m.com*

# Table of Contents

## AIMS AND OBJECTIVES

**The ILM Level 3 Award in First Line Management** aims to give practising or potential first line managers the foundation for their formal development in this role. The qualification does this by developing basic management skills and assisting participants in gaining the basic knowledge required at this level.

**The ILM Level 3 Certificate in First Line Management** aims to give practising or potential first line managers the foundation for their formal development in this role. The qualification does this by developing basic management skills and assisting participants in gaining the basic knowledge required by a manager. This qualification builds on the ILM Level 3 Award in First Line Management, and broadens the skills and knowledge in a flexible and practical way. Learners are not required to undertake the Award as a pre-requisite and may join Certificate programmes directly.

**The ILM Level 3 Diploma in First Line Management** aims to give practising or potential first line managers the widest choice for their formal development in this role. The qualification does this by developing a very wide range of basic management skills and assisting participants in gaining the comprehensive knowledge required by a first line manager. This qualification builds on the ILM Level 3 Award and Certificate in First Line Management, though is more suited to the practising manager, due to the more challenging demands of the programme. Learners are not required to undertake either the Award or the Certificate as pre-requisites and may join Diploma programmes directly.

## QUALIFICATIONS OVERVIEW:

|  | Award | Certificate | Diploma |
|---|---|---|---|
| Credit value | • Minimum 5 credits | • Minimum 20 credits | • Minimum 37 credits |
| Duration | • Minimum 34 Glh | • Minimum 120 Glh | • Minimum 220 Glh |
| To be completed within | • Three years | • Three years | • Three years |
| Induction | • One hour | • 2 hours | • 2 hours |
| Tutorial support | • At least 2 hours | • At least 4 hours | • At least 7 hours |
| Structure | • One mandatory unit with a credit value of 2<br>• Optional units with a minimum total credit of 3 | • Four mandatory units with a combined credit value of 7<br>• Optional units with a minimum total credit value of 13 | • Nine mandatory units with a combined credit value of 13<br>• Optional units with a minimum total credit value of 24 |

## PROGRESSION ROUTES

Successful candidates may benefit from career enhancement and/or progress to any of the further qualifications listed, according to their circumstances:

| Level 3 Award in First Line Management | Level 3 Certificate in First Line Management | Level 3 Diploma in First Line Management |
|---|---|---|
| • L3 Certificate or Diploma in First Line Management<br>• L3 S/NVQ in Management<br>• L4 Award in Management<br>• L5 Award, Certificate or Diploma in Management<br>• Another qualification at a suitable level within or outside the National Qualifications Framework or the Qualifications and Credit Framework | • L3 Diploma in First Line Management<br>• L3 S/NVQ in Management<br>• L4 Award in Management<br>• L5 Award, Certificate or Diploma in Management<br>• Another qualification at a suitable level within or outside the National Qualifications Framework or the Qualifications and Credit Framework | • L3 S/NVQ in Management<br>• L4 Award in Management<br>• L5 Award, Certificate or Diploma in Management<br>• Another qualification at a suitable level within or outside the National Qualifications Framework or the Qualifications and Credit Framework |

## STRUCTURE OF LEVEL 3 FIRST LINE MANAGEMENT QUALIFICATIONS

| Qualification | Credit Value | Unit details | Credit Value |
|---|---|---|---|
| Award | 5 | M3.01 Solving problems and making decisions | 2 |
| | | OPTIONAL UNITS to the value of . . . | 3 |
| Certificate | 20 | M3.01 Solving problems and making decisions | 2 |
| | | M3.02 Understanding change in the workplace | 2 |
| | | M3.03 Planning change in the workplace | 2 |
| | | M3.04 Achieving objectives through time management | 1 |
| | | OPTIONAL UNITS to the value of . . . | 13 |
| Diploma | 37 | M3.01 Solving problems and making decisions | 2 |
| | | M3.02 Understanding change in the workplace | 2 |
| | | M3.03 Planning change in the workplace | 2 |
| | | M3.04 Achieving objectives through time management | 1 |
| | | M3.05 Writing for business | 1 |
| | | M3.06 Managing creativity and innovation in the workplace | 1 |
| | | M3.07 Obtaining information for effective management | 2 |
| | | M3.08 Managing customer service | 1 |
| | | M3.09 Giving briefings and making presentations in the workplace | 1 |
| | | OPTIONAL UNITS to the value of . . . | 24 |

# LIST OF LEVEL 3 FIRST LINE MANAGEMENT UNITS

| Ref | Unit Title | Indicative Glh | Credit Value | Award | Certificate | Diploma |
|------|-----------|------|------|------|------|------|
| M3.01 | Solving problems and making decisions | 11 | 2 | M | M | M |
| M3.02 | Understanding change in the workplace | 11 | 2 | | M | M |
| M3.03 | Planning change in the workplace | 11 | 2 | | M | M |
| M3.04 | Achieving objectives through time management | 7 | 1 | | M | M |
| M3.05 | Writing for business | 6 | 1 | | | M |
| M3.06 | Managing creativity and innovation in the workplace | 7 | 1 | | | M |
| M3.07 | Obtaining information for effective management | 10 | 2 | | | M |
| M3.08 | Managing customer service | 7 | 1 | | | M |
| M3.09 | Giving briefings and making presentations in the workplace | 6 | 1 | | | M |
| M3.10 | Introduction to leadership | 6 | 2 | | | |
| M3.11 | Building the team | 5 | 1 | | | |
| M3.12 | Motivating to perform in the workplace | 10 | 2 | | | |
| M3.13 | Developing yourself and others | 11 | 2 | | | |
| M3.14 | Managing conflict in the workplace | 4 | 1 | | | |
| M3.15 | Managing stress in the workplace | 8 | 1 | | | |
| M3.16 | Managing the employment relationship | 7 | 2 | | | |
| M3.17 | Recruiting, selecting and inducting new staff in the workplace | 10 | 3 | | | |
| M3.18 | Coaching and training your work team | 7 | 2 | | | |
| M3.19 | Providing quality to customers | 6 | 2 | | | |
| M3.20 | Planning to work efficiently | 6 | 2 | | | |
| M3.21 | Organising and delegating | 6 | 1 | | | |
| M3.22 | Managing projects | 7 | 2 | | | |
| M3.23 | Managing health and safety at work | 10 | 3 | | | |
| M3.24 | Understanding organisations in their context | 13 | 2 | | | |
| M3.25 | Understanding culture and ethics in organisations | 7 | 2 | | | |
| M3.26 | Managing performance | 6 | 1 | | | |
| M3.27 | Working with costs and budgets | 7 | 1 | | | |

| M3.28 | Managing the efficient use of materials | 6 | 1 | | | |
|-------|------------------------------------------|---|---|---|---|---|
| M3.29 | Managing the effective use of equipment | 6 | 1 | | | |
| M3.30 | Understanding the communication process in the workplace | 6 | 1 | | | |
| M3.31 | Influencing others at work | 6 | 1 | | | |
| M3.32 | Communicating one-to-one at work | 9 | 1 | | | |
| M3.33 | Effective meetings for managers | 4 | 2 | | | |
| M3.34 | Understanding workplace information systems | 6 | 1 | | | |
| M3.35 | Marketing for managers | 4 | 1 | | | |

## OCCUPATIONAL COMPETENCY REQUIREMENTS FOR THE LEVEL 3 AWARD, CERTIFICATE AND DIPLOMA IN FIRST LINE MANAGEMENT

It is the centres responsibility to ensure that they have competent and suitably qualified staff involved in delivering, quality assuring and/or assessing qualifications.

The table below shows the occupational competence requirements of tutors, internal quality assurors and/or assessors. Given that occupational competence requirements will vary greatly between lower and higher level qualifications, this table will highlight if there is an additional requirement of any qualification specific occupational competency.

| Tutors Occupational Competence Requirements | Evidence Indicators |
|---|---|
| A thorough knowledge and understanding of the qualification(s). | • Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification. <br> • Show evidence of information or documents prepared for learners such as a learner journey plan (SoW), lesson plan, learner guidance notes, tutorial support plan etc. for the ILM qualification. <br> • Show evidence of participation in Continuing Professional Development (CPD) in relation to the relevant field and qualification requirements. |
| Relevant and credible experience in the field of the relevant qualification. | • Be able to prove that they have current experience of delivering training appropriate to the level and subject area of these qualifications |
| A qualification in support of training/teaching. | • Ideally hold a valid and recognised teaching/training qualification. |

| Internal Quality Assurors and/or Centre Assessors Occupational Competence Requirements | Evidence Indicators |
|---|---|
| A thorough knowledge and understanding of the relevant qualification(s). | • Have a relevant qualification in the subject area that must be at equal or higher level or have an equivalent qualification. <br> • Show evidence of carrying out CPD in order to familiarise themselves with current standards for assessment/verification in the subject area of this qualification. |
| Relevant and credible experience in the field of the relevant qualification. | • Demonstrate clear evidence of current experience in quality assurance and/or assessment appropriate to the level and subject area of these qualifications |
| A qualification in support of assessment and/or internal quality assurance. | • Ideally hold an assessment qualification (e.g. TAQA or equivalent) |
| Experience and a working knowledge of the operational and assessment processes for the relevant qualification. | • Demonstrate an understanding of the organisation's management centric policies, procedures and practices. <br> • Demonstrate knowledge and understanding of ILM's quality assurance policy, procedures and requirements. |

## ASSESSMENT GUIDANCE FOR THE LEVEL 3 AWARD, CERTIFICATE AND DIPLOMA IN FIRST LINE MANAGEMENT

A brief introduction on ILM's Assessment Strategy can be found in S*upporting notes for ILM VRQs*. For detailed information, centres are encouraged to refer to the various assessment guides that are available from the ILM Customer Services Team at *customer@i-l-m.com* or refer to the Centre Manual (*www.i-l-m.com/centres.aspx*). This segment gives you specific guidance around assessments for the Level 3 Award, Certificate and Diploma in First Line Management.

Appendix B in this document outlines the assessments* and mark sheets for the mandatory units in this qualification and Appendix C shows outline assessments for optional units. Centres should use the prescribed assessments. However some flexibility is permitted. In exceptional circumstances and to meet a specific need a centre may deviate from the prescribed assessment subject to prior written approval from ILM. Equal opportunities issues are relevant to all units of study and these aspects should be explicitly addressed in the delivery and assessment of this programme. The table below gives a brief overview of the units and assessment(s):

| Mandatory Units | Assessments |
|---|---|
| M3.01 Solving problems and making decisions | Work-Based Assignment |
| M3.02 Understanding change in the workplace | Change Management Report |
| M3.03 Planning change in the workplace | |
| M3.04 Achieving objectives through time management | |
| M3.05 Writing for business | Innovation Project |
| M3.06 Managing creativity and innovation in the workplace | |
| M3.07 Obtaining information for effective management | |
| M3.08 Managing customer service | |
| M3.09 Giving briefings and making presentations in the workplace | Briefing/Presentation |

Learners are likely to come from a variety of backgrounds, in that they will have had different training and work experiences, differing ambitions and opportunities, centres therefore can encourage learners to select topics for assessment in their own organisation and/or area of work, (or within another organisation if they are currently unemployed or self-employed). They should ensure learners are able to present their work as simple and clearly as possible. An approximate word count is given for each assessment. This should only be seen as a guide to help achieve a balanced piece of work.

Centres must ensure that learners adequately complete all sections of the assessment. To ensure all learning outcomes are assessed, section passes have been provided in the assessments. To assist this practice, ILM normally applies a pass mark of 50% in each section as reflecting a minimum pass. Centres must note that compensation between learning outcomes is not allowed in any QCF unit.

*suggested optional Assessments can be downloaded from the ILM website.*

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# A P P E N D I X - A

# UNIT SPECIFICATIONS FOR THE LEVEL 3 AWARD, CERTIFICATE AND DIPLOMA IN FIRST LINE MANAGEMENT

| Title: | Solving problems and making decisions (M3.01) | |
|---|---|---|
| Level: | 3 | |
| Credit value: | 2 | |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1   Know how to describe a problem, its nature, scope and impact | 1.1   Describe a problem, its nature scope and impact |
| 2   Know how to gather and interpret information to solve a problem | 2.1   Gather and interpret information to identify possible solutions to a problem |
| 3   Know how to solve a problem | 3.1   Briefly summarise the options, providing facts and evidence, not just opinion<br>3.2   Use at least <u>one</u> simple decision making technique to evaluate options to arrive at the best solution |
| 4   Know how to plan the implementation and communication of decisions | 4.1   Plan the implementation and communication of the decision<br>4.2   Briefly discuss which monitoring and review techniques could be used to evaluate outcomes |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of solving problems and making decisions as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the | Institute of Leadership & Management |

| unit | |
|---|---|
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 11 |

| **Additional Guidance about the Unit** | |
|---|---|

**Indicative Content:**

1
- Simple ways to recognise, investigate and analyse problems
- Objective setting in relation to problem
- Brainstorming and creative thinking techniques

2
- Difference between data and information
- How to calculate and use simple averages and basic summary statistics
- How to prepare and use grouped data and tables
- Interpretation of charts and diagrams
- Methods of indexing, referencing and structuring qualitative information

3
- How to evaluate options
- The importance of adequate and relevant information for effective decision-making
- Identification of what information is relevant to specific decisions
- Simple decision making techniques

4
- Planning (actions, time-scales, resources etc)
- Effective presentation of a case – i.e., providing facts and evidence, not just opinion
- Monitoring and review techniques to evaluate outcomes of problem solving activities

| Title: | Understanding change in the workplace (M3.02) | |
|---|---|---|
| Level: | 3 | |
| Credit value: | 2 | |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) | |
|---|---|---|
| 1. Understand change in an organisation | 1.1 | Explain the benefits of innovation and change for the organisation |
| | 1.2 | Identify the barriers to change and innovation in the workplace and explain practical ways of overcoming these barriers |
| | 1.3 | Explain why communication is important in successful implementation of change |
| 2. Understand the effects of change on people and finance in an organisation | 2.1 | Explain possible human and financial effects of change upon people, departments and the organisation |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of understanding change as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: C5 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 11 |

| **Additional Guidance about the Unit** |
|---|
| **Indicative Content:** |

| | |
|---|---|
| 1 | • The benefits of change and the consequences of not changing<br>• The role of change in the survival and prosperity of organisations<br>• Concepts of creativity and innovation and their significance for organisational success and change management<br>• The role of communication in successful implementation of change<br>• Barriers to change and innovation – how to identify them and other difficulties in implementing change<br>• Means of overcoming barriers and difficulties including unfreezing and freezing techniques<br>• Methods to monitor and control progress of change against plan, including use of Gantt charts, network planning |
| 2 | • Change fatigue and its adverse effects<br>• Ways to organise and co-ordinate resources and activities to achieve planned change<br>• Simple introduction to the difference between fixed and variable costs<br>• Direct and indirect aspects of change – human and financial effects upon other people, departments and organisations |

| | | |
|---|---|---|
| **Additional Guidance about the Unit** | | |

| Title: | Planning change in the workplace (M3.03) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1   Understand the forces for change in an organisation | 1.1   Identify the forces that may require own organisation to change by conducting a simple PESTLE and/or SWOT analysis |
| 2   Understand planning for change in an organisation | 2.1   Give an example of change required in the workplace reflecting the SWOT and/or PESTLE analyses<br>2.2   Use a technique for planning change within the context of the example given<br>2.3   Identify relevant human and financial factors in the consideration of change within the context of the example given<br>2.4   Explain how to communicate with and involve people to facilitate effective change |
| 3   Understand continuous improvement in an organisation | 3.1   Explain the importance of quality awareness and the need to continuously improve the organisation<br>3.2   Identify the organisation's quality standards<br>3.3   Use a continuous improvement tool or technique relevant to the workplace<br>3.4   Explain ways of involving the team in quality and continuous improvement<br>3.5   Discuss ways to evaluate continuous improvement activities |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of planning change as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: C5 |

| | |
|---|---|
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM & City & Guilds |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 11 |

| **Additional Guidance about the Unit** |
|---|
| **Indicative Content:** |

| 1 | <ul><li>Simple PESTLE analysis</li><li>Organisational SWOT analysis</li></ul> |
|---|---|
| 2 | <ul><li>The principles of change management</li><li>Basics of system theory and process design</li><li>Methods of planning for change</li><li>Use of Gantt charts, network planning as tools for planning change</li><li>Identification of human and financial factors in the consideration of change</li><li>Differentiate between fixed and variable costs</li><li>The importance of communication and involving people to facilitate effective change</li></ul> |
| 3 | <ul><li>The importance of quality awareness and the need to strive for continuous improvement</li><li>Service standards as appropriate to own organisation</li><li>Quality circles, benchmarking, Kaizen</li><li>The importance of commitment and loyalty to the organisation</li><li>Ways to involve people in quality and continuous improvement, including suggestion schemes/role models</li><li>Ways to evaluate continuous improvement activities</li></ul> |

| Title: | Achieving objectives through time management (M3.04) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1. Know how to use effective time management to prioritise and achieve objectives | 1.1 Set SMART objectives for own workload, list them in order of priority and establish appropriate time scales for their achievement<br>1.2 Plan the achievement of the objectives using an established time management technique<br>1.3 Identify constraining or limiting factors that could hinder the achievement of any one of these objectives<br>1.4 Briefly explain the monitoring techniques for any objective |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of achieving objectives through time management as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: A2, F1 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 7 |

| Additional Guidance about the Unit |
| --- |
| **Indicative Content:** |

| 1 | • How to set SMART objectives<br>• Setting priorities to achieve objectives<br>• Urgency vs. importance when prioritising<br>• Negotiating techniques<br>• Time logs<br>• Constraining or limiting factors<br>• Application of simple planning and monitoring techniques<br>• Methods to measure achievement of objectives |
| --- | --- |

| Additional Guidance about the Unit |
| --- |

| Title: | Writing for business (M3.05) | |
|---|---|---|
| Level: | 3 | |
| Credit value: | 1 | |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1   Know how to write a report | 1.1   Write a report to meet specified standards <br> 1.2   Incorporate basic statistics and visual material in the content or in an appendix <br> 1.3   Use effective and appropriate tone, language and level of formality in a report |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of writing for business as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 6 |

| Additional Guidance about the Unit |
|---|
| **Indicative Content:** |

| 1 | <ul><li>The value of the written word in avoiding errors and providing permanent records</li><li>The purpose and conventions of letters, memos, reports and e-mails in use within the organisation</li><li>Planning for writing, including use of available information and the needs of the recipient</li><li>Image, structure, layout conventions including "house styles"</li><li>The importance of objectives and the reader</li><li>Report structures – to meet standard and specific requirements (ILM and/or in-company formats)</li><li>Incorporation of statistics and visual materials, and the use of appendices to enhance understanding</li><li>Effective and appropriate use of tone, language, level of formality in a range of cases</li><li>Supervised practice or simulation to develop the ability to apply knowledge and skills</li></ul> |

| Title: | Managing creativity and innovation in the workplace (M3.06) |
| --- | --- |
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
| --- | --- |
| 1   Understand the importance of creativity and innovation for the organisation | 1.1   Use a technique to encourage creative ideas amongst team members<br>1.2   Explain barriers to creative thinking and resistance to innovation within the team<br>1.3   Explain how to gain the commitment of others in moving creative ideas forward<br>1.4   Evaluate creative and innovative ideas and make reasoned recommendations to managers and others |

| Additional information about the unit | |
| --- | --- |
| Unit purpose and aim(s) | To develop knowledge and understanding of creativity and innovation as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: C2 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 7 |

| Additional Guidance about the Unit | |
| --- | --- |
| **Indicative Content:** | |

| 1 | <ul><li>The importance of creativity and innovation for organisational success</li><li>Auditing techniques to assess an organisation's ability to innovate</li><li>A range of different techniques for encouraging creative ideas amongst team members (e.g.: brainstorming, nominal group technique, TRIZ, SCAMPER, synectics, random juxtaposition)</li><li>Barriers to creative thinking and resistance to innovation within organisations</li><li>Methods of leading others in a creative ideas generation and assessment process</li><li>Evaluation techniques to assist making reasoned recommendations to managers and others</li></ul> |
| --- | --- |

| Title: | Obtaining information for effective management (M3.07) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1 Know how to gather information | 1.1 Use basic data collection techniques to gather information from external, internal and internet sources |
| 2 Know how to validate and analyse information and draw conclusions | 2.1 Check the validity and accuracy of information gathered<br>2.2 Analyse information gathered and draw conclusions |
| 3 Know how to design and analyse questionnaires | 3.1 Design a simple workplace questionnaire that includes a minimum of four different types of questions<br>3.2 Describe a representative sampling technique<br>3.3 Briefly describe how the questionnaire could be administered<br>3.4 Describe a simple technique for analysing the results of the questionnaire |
| **Additional information about the unit** | |
| Unit purpose and aim(s) | To develop knowledge and understanding of obtaining information as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: D1, F1<br><br>Links to SFEDI 2006 NOS: YS4 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | SFEDI<br><br>Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |

| Availability for use | Restricted to ILM |
|---|---|
| Units available from | 01/01/2008 |
| Unit guided learning hours | 10 |

| **Additional Guidance about the Unit** |
|---|
| **Indicative Content:** |

| 1 | <ul><li>The value of valid, accurate and timely information to the organisation</li><li>Basic means of data collection – questions, observation, surveys, source records</li><li>Basic questioning techniques</li><li>How to prepare and use surveys and questionnaires</li><li>Constraints on the availability of and access to data, including legal issues</li><li>How to validate data and information</li></ul> |
|---|---|
| 2 | <ul><li>Means of determining the value (validity, accuracy, efficiency, effectiveness) of information sources</li><li>Internal sources – documentation, standard reports, etc</li><li>External published sources (including Government statistics)</li><li>Accessing the Internet, use of search engines, usefulness of web-based materials</li><li>Obtaining information from the internet employing Boolean search terms (the words – and, or, not)</li><li>Analysing information</li><li>Reaching conclusions</li></ul> |
| 3 | <ul><li>Application of questionnaires in the workplace</li><li>Basic representative sampling techniques</li><li>Recognition of realistic response rates to questionnaires</li><li>How to design effective questions and response options</li><li>The importance of structure and appearance in questionnaire design</li><li>Pilot surveys to test reliability and validity</li><li>Administration of questionnaires by post, telephone or interview</li><li>Simple techniques for analysing the results of questionnaires</li></ul> |

| Title: | Managing customer service (M3.08) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1    Understand basic customer service | 1.1    Briefly describe at least two legal rights of customers<br>1.2    Briefly describe two of the organisation's commitments to customers<br>1.3    Briefly describe the manager's responsibilities in relation to customer service |
| 2    Know how to care for the customer | 2.1    Identify an external and an internal customer of the organisation<br>2.2    Describe how customer needs are identified<br>2.3    Explain how customer service standards and procedures are used to meet customer needs<br>2.4    Explain how they could monitor customer service against the standards set |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of meeting customer needs as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: F6, F8 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |

| Availability for use | Restricted to ILM |
|---|---|
| Units available from | 01/01/2008 |
| Unit guided learning hours | 7 |

| **Additional Guidance about the Unit** |
|---|

| **Indicative Content:** |
|---|

| 1 | • How to identify the internal customer chain, external customers, and potential customers<br>• Techniques for identifying customer needs<br>• Methods of establishing relevant customer care standards and procedures<br>• Use of appropriate planning and quality systems to monitor and fulfil customer care standards<br>• Methods to establish and maintain effective relationships with customers at all stages |
|---|---|
| 2 | • The legal rights of customers (law of contract, sale of goods and services, trade descriptions, etc)<br>• Organisational commitments to customers (contract terms, warranties and guarantees, service standards, etc)<br>• Methods of identifying customer requirements and expectations<br>• Standards and benchmarks<br>• Manager's responsibilities and authority in relation to customer service |

| Title: | Giving briefings and making presentations in the workplace (M3.09) |
|---|---|
| **Level:** | 3 |
| **Credit value:** | 1 |

| Learning outcomes (the learner <u>will</u>) | Assessment criteria (the learner <u>can</u>) |
|---|---|
| 1. Know how to conduct a briefing or presentation | 1.1 Select appropriate information in line with the objectives of the briefing or presentation<br>1.2 Logically structure the content of the briefing or presentation<br>1.3 Introduce an appropriate management topic clearly<br>1.4 Use appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation<br>1.5 Present information clearly<br>1.6 Display confidence in the subject matter<br>1.7 Keep to time<br>1.8 Use feedback to check understanding<br>1.9 Design a simple evaluation form |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of briefing and presentation skills as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |

| Units available from | 01/01/2008 |
|---|---|
| Unit guided learning hours | 6 |

| **Additional Guidance about the Unit** |
|---|
| **Indicative Content:** |

| 1 | • Selection of relevant information content<br>• How to plan and prepare effectively for briefings (account for Purpose; Audience; Content; Form)<br>• Formal and informal presentation skills including platform techniques and visual aids<br>• How to evaluate briefings/presentations<br>• Use of feedback to check understanding<br>• Reporting back to management after briefing<br>• The value of various methods of data presentation – tables, graphs, charts, diagrams, Gantt charts, etc<br>• Evaluation of alternative methods to select the most appropriate for a given situation<br>• How to construct a range of data presentation methods<br>• The use of spreadsheets for the creation of graphs, charts and diagrams<br>• How to interpret information contained in charts and diagrams, and explain this to others<br>• Supervised practice or simulation to develop the ability to apply knowledge and skills |
|---|---|

| Title: | Introduction to leadership (M3.10) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1. Understand leadership styles | 1.1 Identify the factors that will influence their choice of leadership styles or behaviours in workplace situations<br>1.2 Explain why these leadership styles or behaviours are likely to have a positive effect on individual and group behaviour |
| 2. Understand leadership qualities and review own leadership qualities and potential | 2.1 Assess own leadership behaviours and potential in the context of a particular leadership model and own organisation's working practices and culture, using feedback from others<br>2.2 Describe appropriate actions to enhance own leadership behaviour in the context of the particular leadership model |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop an introductory knowledge and understanding of leadership as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: B6 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |

| Units available from | 01/01/2008 |
|---|---|
| Unit guided learning hours | 6 |

| **Additional Guidance about the Unit** | |
|---|---|

**Indicative Content:**

| 1 | • Differences and similarities between leadership and management, and the need for each of them<br>• Range of at least three leadership models (such as trait, contingency, situational, distributive, servant oblique leader, transactional/transformational) and their significance for task performance, culture and relationships<br>• Leadership behaviours and the sources of power |
|---|---|
| 2 | • Identification, development and appropriate choice of personal leadership styles and behaviours<br>• The role of trust and respect in effective team leadership<br>• Supervised practice or simulation to develop the ability to apply knowledge and skills |

| Title: | Building the team (M3.11) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1   Understand how to develop and maintain trust at work | 1.1  Explain behaviours which could develop and maintain trust at work<br>1.2  Explain why confidentiality is important in building and maintaining trust in the team |
| 2   Know how to build the team | 2.1  Give <u>one</u> example of a group and <u>one</u> example of a team within the workplace. Justify the classification of examples given<br>2.2  Briefly describe the stages of an established model of group formation Explain how a manager could benefit from knowing team members' preferred team roles |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of building the team as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: C5, C6 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |

| Unit guided learning hours | 5 |
| --- | --- |

| **Additional Guidance about the Unit** |
| --- |
| **Indicative Content:** |

| 1 | • The nature of formal and informal working relationships<br>• Role of open communications and the need to keep people informed, in creating effective working relationships<br>• Range of internal and external contacts<br>• Differences between people, and the effects on relationship building<br>• Differences in organisational culture, and the effects on relationship building at work<br>• Social skills appropriate to the workplace<br>• Range of behaviours which develop, maintain and destroy trust at work<br>• The importance of maintaining confidentiality in the workplace |
| --- | --- |
| 2 | • Characteristics of groups and teams – the differences, examples within the workplace<br>• Tuckman's theory of group formation<br>• How to identify team roles (e.g. Belbin) and the uses and implications for managers<br>• Building a balanced team to achieve objectives |

| Title: | Motivating to perform in the workplace (M3.12) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1  Understand the value of assessing performance to meet organisational and individual needs | 1.1  Explain the value of formal and informal performance assessment in the workplace<br>1.2  Identify ways that could ensure fair and objective formal assessment |
| 2  Know how to motivate the team to improve performance in the workplace | 2.1  Outline the factors that influence how people behave at work<br>2.2  Explain how to apply one basic recognised theory of motivation to team members |
| 3  Understand the value of feedback in the workplace | 3.1  Explain the importance of feedback to improve communication and performance<br>3.2  Compare the effectiveness of different types of feedback |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of motivating the team to perform as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: B6, D6 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM and WAMITAB |

| Units available from | 01/01/2008 |
|---|---|
| Unit guided learning hours | 10 |

**Additional Guidance about the Unit**

**Indicative Content:**

1
- The purpose and value of formal and informal performance assessment at work (formal assessment includes performance review/appraisal)
- Ways to ensure fair and objective assessment
- Preparations necessary for effective, valid and reliable assessments
- Feedback techniques following assessment
- Roles and responsibilities of individuals in the performance assessment process
- Appropriate assessment records
- How to conduct formal appraisals

2
- Overview of the factors influencing behaviour at work
- Basic theories of motivation and their application to teams and individuals
- Styles and patterns of behaviour at work
- Range of techniques to motivate individuals and monitor performance
- Positive approaches to offset negative attitudes in the workplace

3
- The importance of feedback to improve communication and performance
- Types of feedback and their relative values in communication (visual, written, oral, aural)
- Use of feedback to improve the performance of individuals in the workplace
- How to use feedback techniques (formal/informal; positive/negative; timescale; format)
- How to elicit feedback from others to improve own performance

| Title: | Developing yourself and others (M3.13) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner <u>will</u>) | Assessment criteria (the learner can) |
|---|---|
| 1  Know how to identify development needs and develop self and others to achieve organisational objectives | 1.1  Use at least <u>one</u> simple technique for identifying own development needs and the development needs of <u>one</u> other member of the team<br>1.2  Identify own learning style(s) and the learning style(s) of <u>one</u> other member of the team<br>1.3  Briefly analyse <u>two</u> learning/development options to meet need(s) of self and <u>one</u> other member of the team<br>1.4  Identify barriers to learning and explain how these barriers can be overcome<br>1.5  Identify support mechanisms for the development of self and <u>one</u> other member of the team<br>1.6  Describe methods used to monitor the development of self and <u>one</u> other member of the team |
| **Additional information about the unit** | |
| Unit purpose and aim(s) | To develop knowledge and understanding of developing self and others as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: A2, C6, D7 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM and WAMITAB |

| Units available from | 01/01/2008 |
|---|---|
| Unit guided learning hours | 11 |

| **Additional Guidance about the Unit** |
|---|
| **Indicative Content:** |

| 1 | • Use of job description, matching to own CV<br>• Personal SWOT analysis<br>• Organisation's objectives and development plans and significance for own development<br>• Obtaining feedback on performance from line managers and colleagues<br>• Simple training needs analysis – using outcomes of SWOT and PESTLE analyses<br>• Identification of preferred learning styles<br>• The importance of taking responsibility for own personal development<br>• Value of learning and the importance of encouraging a commitment to learning<br>• Identification of potential development opportunities<br>• Barriers to learning, and methods to overcome them<br>• Development plans including timescale and resource implications<br>• Available support mechanisms<br>• How to compile learning logs and records of activities |
|---|---|

| Title: | Managing conflict in the workplace (M3.14) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1    Know how to resolve conflict in the workplace | 1.1    Identify causes of conflict at work <br> 1.2    Describe the stages in the development of conflict <br> 1.3    Explain the effects of conflict on individual and team performance at work <br> 1.4    Explain any recognised technique a manager could use to minimise and resolve conflict in the workplace <br> 1.5    Describe how a manager could create harmony at work and engender a positive atmosphere in order to minimise the adverse effects of conflict |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of managing conflict and supporting individuals as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: D1 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 4 |

| **Additional Guidance about the Unit** |
|---|
| **Indicative Content:** |
| 1    •   Possible causes of internal conflict, e.g.: personal versus business/enterprise objectives/values<br>•   Causes of interpersonal friction at work, including bullying and harassment<br>•   The effects of conflict on performance and the individual at work<br>•   Stages in the development of conflict<br>•   The manager's responsibility in minimising and resolving conflict, and techniques to achieve this<br>•   Ways to create harmony at work and engender a positive atmosphere |

| Title: | Managing stress in the workplace (M3.15) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1 Understand how to manage own stress and minimise stress in others | 1.1 Examine the causes and impact of stress in the organisation<br>1.2 Describe the symptoms of stress in self and in others<br>1.3 Explain one practical stress management technique<br>1.4 Outline management responsibilities and actions in relation to work-related stress in the team |
| 2 Know how to support individuals in the team | 2.1 Explain how to decide when to provide advice, mentoring or counselling to support individuals in the workplace |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of managing stress as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: C6<br><br>Links to SFEDI 2006 NOS: YS3, OP5, OP8 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | SFEDI<br><br>Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 8 |

| **Additional Guidance about the Unit** |
|---|
| **Indicative Content:** |
| 1 | <ul><li>Causes and impacts of stress at work</li><li>Symptoms of stress in self and in others</li><li>Implications of stress for workplace and non-work activities/relationships</li><li>Implications and effects of stress for individuals and organisations</li><li>Management responsibilities in relation to work-related stress</li><li>Simple practical stress management techniques</li><li>Sources of available support for stress sufferers</li><li>Action planning and review techniques</li></ul> |
| 2 | <ul><li>Definitions of counselling, advising and mentoring and when to use each of them to support individuals</li><li>Principles of counselling</li><li>Mentoring, and the mentoring cycle</li><li>Range of available counselling and support mechanisms</li></ul> |

| **Additional Guidance about the Unit** |
|---|

| Title: | Managing the employment relationship (M3.16) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1   Understand diversity in the workplace | 1.1   Identify the main provisions of statutory requirements for the employment relationship, discrimination at work and fair employment<br>1.2   Identify the organisation's employment policies and procedures that could guide the first line manager in managing diversity in the workplace<br>1.3   Explain the importance of diversity in the workplace<br>1.4   Explain the consequences of non-compliance with diversity policies for own work area and for the organisation |
| 2   Know how to maintain discipline in the workplace | 2.1   Identify the organisation's employment policies and procedures that could guide the first line manager in dealing with disciplinary issues<br>2.2   Describe how they could monitor discipline in the workplace<br>2.3   Briefly describe the legal aspects of the disciplinary process<br>2.4   Review own ability to maintain discipline in the workplace |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of the employment relationship as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: B11, D1, D3 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |

PAGE 43

| Name of the organisation submitting the unit | Institute of Leadership & Management |
|---|---|
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 7 |

**Additional Guidance about the Unit**

**Indicative Content:**

| 1 | • Definition of diversity and its impact on the organisation and its activities<br>• Legislation as it affects employment – sex, age, ethnicity, disability, etc<br>• Own organisation's policies and procedures<br>• Significance of diversity in the market place<br>• The consequences of non-compliance for own work area and the organisation |
|---|---|
| 2 | • Organisational employment policies, (e.g. relating to time-keeping, absenteeism, conduct, level of performance, attitude and behaviour, gross misconduct)<br>• Records and other means to support and monitor the disciplinary process<br>• Legal aspects of disciplinary processes |

| Title: | Recruiting, selecting and inducting new staff in the workplace (M3.17) |
|---|---|
| Level: | 3 |
| Credit value: | 3 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1   Know how to plan to recruit | 1.1   Identify the organisation's policies and procedures that could guide the first line manager in recruitment, selection and induction<br>1.2   Conduct a job analysis and prepare a job description and person specification for a post within own area of responsibility |
| 2   Know how to select the right person | 2.1   Explain how they could prepare for selection interviews to ensure impartiality and optimum decision making in selecting the most suitable applicant<br>2.2   Explain a recognised selection technique that could be used during interviews |
| 3   Understand the induction process | 3.1   Explain the importance of effective induction<br>3.2   Describe the phases of induction in the organisation<br>3.3   Describe which legal and practical aspects of health and safety should be included in the organisation's induction process<br>3.4   Explain one method that could be used to record an individual's progress during induction<br>3.5   Explain how an induction process could be evaluated |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of recruitment, selection and induction as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: D3 |

| | |
|---|---|
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 10 |

**Additional Guidance about the Unit**

**Indicative Content:**

| | |
|---|---|
| 1 | • Own organisational recruitment policies and procedures<br>• Basic legal aspects of recruitment<br>• Simple techniques for job analysis<br>• How to prepare job descriptions and person specifications<br>• Range of methods of advertising vacancies, internally and externally, and how to select the most appropriate for a variety of posts |
| 2 | • The relative merits of internal and external applications<br>• Use of job descriptions and person specifications to shortlist applicants<br>• Preparation for selection interviews to ensure impartiality and optimum decision<br>• Selection interviewing techniques<br>• Alternative methods for selecting the most suitable applicant |
| 3 | • The importance of effective induction<br>• The phases of induction (e.g.: organisational, local team, facilities, spread over time)<br>• Matching of organisational and individual needs during induction<br>• Legal and practical aspects of health and safety to be included<br>• Methods to monitor and record an individual's progress<br>• How to evaluate the effectiveness of the induction process |

| Title: | Coaching and training your work team (M3.18) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1 Understand training appropriate to the workplace | 1.1 Clarify the training need<br>1.2 Explain two training techniques appropriate to the workplace situation<br>1.3 Explain how they could cater for different learning styles when training individuals in the workplace<br>1.4 Explain one relevant feedback technique that could work effectively in the workplace situation<br>1.5 Describe methods of evaluating the effectiveness of training<br>1.6 Explain how they could maintain training records |
| 2 Understand how to coach an individual in an organisation | 2.1 Clarify the coaching need<br>2.2 Explain how to plan the coaching for an individual in the organisation<br>2.3 Explain the importance of feedback in coaching<br>2.4 Describe one method of evaluating the effectiveness of coaching |
| **Additional information about the unit** | |
| Unit purpose and aim(s) | To develop knowledge and understanding of coaching and training as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: D7 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the | Institute of Leadership & Management |

| unit | |
|---|---|
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 7 |

| **Additional Guidance about the Unit** | |
|---|---|

**Indicative Content:**

| 1 | • Identifying when training is an appropriate method to address a development need<br>• Training techniques appropriate to the workplace situation<br>• Range of learning styles and their implications for training design<br>• Relevant feedback techniques<br>• Methods to evaluate effectiveness of training<br>• Appropriate recording systems<br>• Supervised practice or simulation to develop the ability to apply knowledge and skills |
|---|---|
| 2 | • Identifying when coaching is an appropriate method to address a development need<br>• Coaching techniques as appropriate to the workplace situation<br>• Role of feedback in coaching<br>• Methods to evaluate effectiveness of coaching<br>• Supervised practice or simulation to develop the ability to apply knowledge and skills |

| Title: | Providing quality to customers (M3.19) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1  Understand quality within an organisation | 1.1  Explain why quality is important to internal and external customers in the organisation<br>1.2  Explain what is meant by Total Quality Management<br>1.3  Explain the difference between design quality standards and process quality standards<br>1.4  Identify one example of the cost of quality in the workplace |
| 2  Know how to deliver quality within an organisation | 2.1  Briefly describe the quality system used by the organisation<br>2.2  Identify two quality standards set for the organisation<br>2.3  Briefly describe tools used to monitor quality in the workplace<br>2.4  Briefly describe records for maintaining quality in the workplace<br>2.5  Identify two practical and positive steps to improve quality to meet customer requirements in the workplace |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of providing quality to customers as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: F8 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |

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|---|---|
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 6 |

| **Additional Guidance about the Unit** |
|---|

| **Indicative Content:** |
|---|

| 1 | • Quality and its importance to customers (internal and external); difference between quality assurance and quality control<br>• Difference between design quality and process quality standards<br>• The cost of quality (positive and negative aspects)<br>• Total quality management |
|---|---|
| 2 | • Quality systems – ISO 9000, EFQM and IiP (the benefits of accreditation, and how to gain it)<br>• The total quality management concept<br>• Practical steps to quality – team approaches<br>• Records for maintaining quality<br>• Tools for quality – the role of statistics in quality control as relevant to organisation |

| Title: | Planning to work efficiently (M3.20) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1 Know how to plan work | 1.1 Identify targets set for the team; and state indicators to measure performance<br>1.2 Use one appropriate planning technique to plan a job activity<br>1.3 Explain one technique to monitor and control a planned job activity<br>1.4 Explain the importance of the supply chain in delivering results and meeting customer requirements |
| 2 Understand the importance of efficiency and effectiveness to achieve objectives | 2.1 Explain the importance of effectiveness and efficiency to achieve their workplace objectives<br>2.2 Explain how efficiency and effectiveness are measured in their organisation |
| Additional information about the unit | |
| Unit purpose and aim(s) | To develop knowledge and understanding of planning to work efficiently as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: D6 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |

| Units available from | 01/01/2008 |
| --- | --- |
| Unit guided learning hours | 6 |

| **Additional Guidance about the Unit** | |
| --- | --- |
| **Indicative Content:** | |
| 1 | • Links between organisational and team objectives<br>• Target setting and performance indicators<br>• Planning techniques appropriate to job activity (e.g. task/work/production schedules, timetables, rotas, Kanban systems, Just In Time and Take time, etc, as appropriate)<br>• Importance of supply chain in delivering results and meeting customer requirements<br>• Monitoring and control techniques and records<br>• Use of results to "close the loop", so ensuring that objectives are achieved |
| 2 | • Definitions of effectiveness and efficiency, and the difference between them<br>• The need to achieve results and meet objectives<br>• The importance to the organisation of operating efficiently<br>• Potential for conflict between efficiency and effectiveness, and ways to resolve this |

| Title: | Organising and delegating (M3.21) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1 Know how to organise people to achieve objectives | 1.1 Explain the importance of making effective and efficient use of people's knowledge and skills while planning the team's work to achieve objectives<br>1.2 Use one technique to identify the appropriate person for an activity<br>1.3 Explain how human resource planning can be used to assure output and quality |
| 2 Know how to delegate to achieve workplace objectives | 2.1 Give one example of delegation and one example of empowerment in the workplace<br>2.2 Identify one barrier to delegation and one mechanism to support delegation<br>2.3 Explain one technique that could be used to monitor the outcomes of delegation in the workplace<br>2.4 Review the effectiveness of feedback, recognition and reward techniques in the workplace |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of organising and delegating as required by a practising or potential first line manager. |
| Unit review date | 30/06/2015 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: B6 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the | Institute of Leadership & Management |

| unit | |
|---|---|
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 6 |

| **Additional Guidance about the Unit** | |
|---|---|
| **Indicative Content:** | |
| 1 | <ul><li>The importance of planning the team's work to achieve objectives</li><li>Techniques for deciding the most appropriate individual to undertake the activity</li><li>The importance of making effective and efficient use of people's knowledge and skills, and how to achieve this</li><li>Outline of the principles of human resource planning to assure continuity of output and quality</li></ul> |
| 2 | <ul><li>Definitions of authority and power; responsibility and accountability</li><li>Concepts of delegation and empowerment</li><li>Process of delegation including barriers and support mechanisms</li><li>Techniques to monitor outcomes of delegation</li><li>Feedback, recognition and reward techniques</li></ul> |

| Title: | Managing projects (M3.22) | |
|---|---|---|
| Level: | 3 | |
| Credit value: | 2 | |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1    Know how to manage a simple workplace project | 1.1    Identify a simple workplace project<br>1.2    Use one simple tool for determining the financial viability of the project<br>1.3    Plan the project using one appropriate project planning technique<br>1.4    Set objectives and targets/milestones to monitor performance and review plans<br>1.5    Use one project evaluation technique |
| 2    Understand the costs and benefits resulting from a workplace project | 2.1    List areas where net savings could be achieved as a result of the workplace project<br>2.2    Identify wider non-financial implications that could result from the workplace project |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of managing projects as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: F1 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |

| Unit guided learning hours | 7 |
|---|---|
| **Additional Guidance about the Unit** | |
| **Indicative Content:** | |

| 1 | • Basic project design principles<br>• Simple tools for financial appraisal of projects<br>• Project planning techniques (Gantt charts, Flow charts, Network planning)<br>• Use of objectives and targets/milestones to monitor performance and review plans<br>• Project evaluation and review techniques |
|---|---|
| 2 | • Recent or current examples of change (including the work-based project)<br>• The costs associated with change – increases or savings<br>• Non-financial costs and benefits of change (social, environmental, human elements) |

| Title: | Managing health and safety at work (M3.23) |
|---|---|
| Level: | 3 |
| Credit value: | 3 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1    Understand health and safety at work | 1.1    Identify two pieces of legislation relating to health, safety and welfare at work<br>1.2    Explain two duties statute law imposes on both the manager and the team<br>1.3    Outline the manager's responsibilities contained within the organisation's Health and Safety Policy<br>1.4    Explain the meaning of "a competent person"<br>1.5    Identify two ways to provide Health and Safety information, instruction and training to the team<br>1.6    Identify expertise available in the organisation to help and advise the manager on health and safety issues |
| 2    Understand risk assessment and accident prevention in the workplace | 2.1    Conduct a simple risk assessment in the workplace<br>2.2    Explain one practical accident prevention and control measure that could be implemented in the workplace |
| 3    Understand the organisation's environmental responsibility | 3.1    Explain the importance of environmental responsibility for own organisation<br>3.2    Describe what action the first line manager could take to enable the organisation to fulfil its environmental responsibility |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of health and safety at work as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: D6, E6 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |

| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| --- | --- |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 10 |

**Additional Guidance about the Unit**

**Indicative Content:**

1
- General legal background – statute law, common law negligence and their effects on the workplace
- Approved Codes of Practice and Guidance Literature as relevant to own organisation
- Experts available to help and advise
- HSWA 1974 and Regulations and Fire Precautions Act 1971
- Levels of statutory duty and legal obligations to provide Health and Safety information, instruction and training
- Consultation with employees duties inc. Safety Representatives and role of Safety Committees
- Recording and reporting of injuries, diseases and dangerous occurrences
- Importance of creating a safety culture at work and taking account of health and safety in all decision-making

2
- Definition of accident and incident
- Simple accident theory – the types and causes of accidents, especially in own organisation
- Methods for managing safety in the workplace
- Risk assessment procedures and associated documentation
- Practical accident prevention in own workplace
- Handling and lifting techniques as appropriate
- Reacting to and coping with accidents at work

3
- The importance of environmental protection to the organisation
- The manager's responsibility to implement environmental protection policies and procedures

| Title: | Understanding organisations in their context (M3.24) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1   Understand the context within which an organisation operates | 1.1   Identify the legal entity of the organisation<br>1.2   List the operational functions within the organisation<br>1.3   Use an organisational chart to identify own role, span of control and reporting line in the organisation<br>1.4   Briefly outline the roles and responsibilities of managers at different levels of the organisation<br>1.5   Briefly explain the relevance to an organisation of its different stakeholders |
| 2   Understand the financial environment within which an organisation operates | 2.1   Explain the importance of financial information for management<br>2.2   Identify the main financial documents needed by the organisation and briefly describe the information they contain<br>2.3   Identify the most significant financial indicators of business performance in the organisation and briefly describe their relevance<br>2.4   List the main sources of long, medium and short term funds for the organisation |
| 3   Understand the economic environment within which an organisation operates | 3.1   Identify the major economic and political forces which impact upon the organisation<br>3.2   Briefly describe how government attempts to influence the economy and its effect on the organisation's operations |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of organisations in context as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: D7 |

| | |
|---|---|
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 13 |

**Additional Guidance about the Unit**

**Indicative Content:**

1.
- The nature and purpose of organisations
- An outline of basic business structures – sole trader, partnership, limited companies, public sector organisations, voluntary sector, etc
- Operational functions within the organisation, such as marketing, finance, production, etc
- Overview of the management task
- Formal and informal organisational relationships between departments and people
- Various types of organisation chart
- Management roles and responsibilities within the organisation
- The relevance of stakeholders, and how to identify them

2.
- Value of financial information for management
- Key source documents used in accounting (invoices, etc)
- Simple treatment of the balance sheet, profit and loss account, and cash flow forecast
- Simple treatment of income and expenditure accounts (for non-profit organisations)
- Financial measures of business performance – how to calculate and interpret simple accounting ratios
- An outline of sources of finance

3.
- Simple outline of the impact of economics and politics on the organisation
- Brief outline of the key economic issues – inflation, unemployment, trade cycles, exchange rates, economic growth, price mechanism, competition, economic indicators, "factors of production" affecting business location as relevant to own organisation
- How government uses fiscal, monetary and legal measures to influence the economy, and the effects on organisational operations
- A brief treatment of key global issues and the challenges they present to organisations
- The UK's (or your own country's) key trading partners – international competition
- The European Union (or other appropriate trading bloc) – its purpose, scope, membership and key institutions

- Other international organisations which have an influence on business – as appropriate
- Currency exchange rates and their impact on business operations

| Title: | Understanding culture and ethics in organisations (M3.25) |
|---|---|
| **Level:** | 3 |
| **Credit value:** | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1  Understand an organisation's culture | 1.1  Describe the dominant culture within the organisation and explain how this influences the management style and team structure<br>1.2  Recognise own responsibility to promote the organisation's vision and help shape the culture<br>1.3  Explain how to approach problems in the workplace without creating a 'blame culture"<br>1.4  Briefly explain how internal politics could arise within the organisation and its possible effects |
| 2  Understand ethics and values in business | 2.1  Define values within the context of the organisation<br>2.2  Describe how to communicate the organisation's values to the team<br>2.3  Explain how a first line manager could approach a problem between individuals who have different perceptions, values or cultures<br>2.4  Explain how a first line manager could approach a problem where an individual's personal values clash with that of the organisation<br>2.5  Describe one of the organisation's corporate social responsibilities<br>2.6  Briefly explain the rights given to people at work by the Public Interest Disclosure legislation to "blow the whistle" on perceived malpractice |
| 3  Understand the organisation's social responsibility | 3.1  Explain the importance of social responsibility and sustainability<br>3.2  Describe what action the first line manager could take to enable the organisation to fulfil its social responsibility |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of culture and ethics as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |

| | |
|---|---|
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: B6 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 7 |

**Additional Guidance about the Unit**

**Indicative Content:**

1
- Types of organisational culture and how they are manifest in terms of structure of teams and management style
- Concepts of values and vision and their relevance to the first line manager role
- The effects of different cultures and management styles
- The effect of "blame cultures" contrasted with problem solving approaches
- How internal "politics" arise within organisations, and their effects
- The concept of sub-cultures, and their effective management

2
- Definition of ethics in the work context
- Alternative perceptions – value judgements
- The range of cultures, beliefs and value systems
- Personal ethics vs business ethics – potential for both conflict and synergy
- Ethical considerations for investment, trading, competition, manufacturing, employment, etc
- Social responsibilities of organisations – e.g.: to the wider community
- The costs and possible payback of using an ethical approach
- "Whistle-blowing" legislation
- Mission statements, business objectives, PR, briefings, community involvement as ways to communicate the organisation's ethical values

3
- The importance of corporate social responsibility and sustainability
- The role of first line managers in enabling organisations to fulfil their social responsibility

| Title: | Managing performance (M3.26) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1  Know how to manage performance | 1.1  Briefly explain the role of the first line manager in performance management<br>1.2  Set SMART objectives for the team<br>1.3  Set performance standards for the team<br>1.4  Explain how they would measure performance against agreed standards<br>1.5  Select an example of under-performance in the workplace and explain a performance improvement technique available to address this under-performance |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of performance management as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: C6, D1, D6 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 6 |

| Additional Guidance about the Unit | |
|---|---|

| **Indicative Content:** |
|---|

| 1 | <ul><li>The differing objectives of stakeholders in the organisation – customers, employees, partners, owners, the community</li><li>First line manager's responsibility for managing team and individual performance and meeting objectives</li><li>The relevance of SMART objectives, and how to set them</li><li>How to set performance standards</li><li>How to measure performance against agreed standards</li><li>A range of methods for measuring performance and how to select the ideal one</li><li>Techniques for performance monitoring and evaluation</li><li>How to interpret variances in performance and take appropriate action</li><li>Range of performance improvement techniques available to the manager</li></ul> |

| Title: | Working with costs and budgets (M3.27) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1    Know how to work to a budget | 1.1    Explain the importance of agreeing to a budget and operating within it <br> 1.2    Describe a method to monitor variance between actual performance and budget <br> 1.3    Explain how information used in determining and/or revising budgets is gathered |
| 2    Understand costs within an organisation | 2.1    Explain fixed and variable costs; and the concept of break even in relation to the organisation <br> 2.2    Explain the purpose and nature of basic cost statements <br> 2.3    Explain the value of standard costing and its role as a control mechanism <br> 2.4    Briefly describe mechanisms in the organisation to maintain control of costs |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of costs and budgets as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: E1 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |

| Availability for use | Restricted to ILM and WAMITAB |
|---|---|
| Units available from | 01/01/2008 |
| Unit guided learning hours | 7 |

| **Additional Guidance about the Unit** |
|---|
| **Indicative Content:** |

| 1 | • The nature and purpose of budgets, and the advantages of budgetary control<br>• Methods to monitor variance of actual performance against budget<br>• Causes of variance, their significance and ways of reducing adverse effects<br>• How to gather information for use in determining and/or revising budgets |
|---|---|
| 2 | • Definition of fixed and variable costs; concept of break even, especially in relation to own organisation<br>• The purpose and nature of basic cost statements; use of standard costs<br>• Role of the manager in cost control<br>• Mechanisms to maintain control of costs, and how to select the optimum method |

| Title: | Managing the efficient use of materials (M3.28) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1 Understand how material stocks are acquired, controlled and recorded in an organisation | 1.1 Describe how to determine stock requirements in the workplace<br>1.2 Explain two consequences of not maintaining optimum stocks in the workplace<br>1.3 Identify organisational stores/stock control principles and procedures<br>1.4 Outline the organisation's procedures for recording, receipt and issue of supplies<br>1.5 Briefly describe why quality standards need to be maintained in the organisation |
| 2 Know how to minimise waste in an organisation | 2.1 Identify potential waste in the organisation<br>2.2 Outline the techniques and/or methods for measuring and monitoring waste in the organisation<br>2.3 Compile a simple action plan to minimise waste in the workplace |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of using materials efficiently as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the | Institute of Leadership & Management |

| unit | |
|---|---|
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 6 |

| **Additional Guidance about the Unit** | |
|---|---|
| **Indicative Content:** | |

| 1 | <ul><li>The importance of maintaining optimum stocks</li><li>Methods of determining stock requirements</li><li>Stores and stock control principles and procedures</li><li>Procedures for recording receipt and issue of supplies and equipment</li><li>Maintenance of records for quality standards</li></ul> |
|---|---|
| 2 | <ul><li></li><li>Areas of potential waste inefficiency including misuse, extravagance, scrap, rework, shrinkage or others as appropriate</li><li>Techniques and methods for measurement and monitoring waste</li><li>Simple principles of action planning and evaluation as relevant to minimising waste</li></ul> |

| Title: | Managing the effective use of equipment (M3.29) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1   Understand the need for effective and efficient use of equipment | 1.1   Explain why equipment should be used effectively and efficiently<br>1.2   Describe how the use of equipment is monitored and controlled in the workplace<br>1.3   Explain why it is important to have a scheduled maintenance programme for equipment in the workplace<br>1.4   Compile a simple maintenance programme for equipment in the workplace<br>1.5   Conduct a simple risk assessment of equipment security in the workplace, and explain how these risks could be reduced |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of managing the use of equipment as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM and WAMITAB |
| Units available from | 01/01/2008 |

| Unit guided learning hours | 6 |
|---|---|
| **Additional Guidance about the Unit** | |
| **Indicative Content:** | |

| 1 | • Implications of equipment usage – acquisition and operating costs – for the organisation <br> • Awareness of marginal costs, and how these are used within the organisation <br> • Methods of capacity planning <br> • The importance of scheduled maintenance programmes, and how to plan these <br> • Security issues in the workplace <br> • Risk assessments for security issues <br> • Security and care of equipment |
|---|---|

| Title: | Understanding the communication process in the workplace (M3.30) |
|---|---|
| **Level:** | 3 |
| **Credit value:** | 1 |

| Learning outcomes (the learner <u>will</u>) | Assessment criteria (the learner <u>can</u>) |
|---|---|
| 1   Understand the communication process and relevant communication media | 1.1   Outline the stages in the communication process<br>1.2   Identify <u>two</u> possible barriers to communication in the workplace and describe how each barrier could be overcome<br>1.3   Name <u>two</u> different types of communication that could ensure effective communication in the workplace and identify an advantage and a disadvantage of each<br>1.4   Explain how non-verbal communications can influence the receiver<br>1.5   Briefly explain how to use feedback to check the effectiveness of communication |
| 2   Know how to increase information awareness in the workplace | 2.1   Explain how they could increase information awareness in own workplace |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of the communication process as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: C2 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |

| Name of the organisation submitting the unit | Institute of Leadership & Management |
|---|---|
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 6 |

| **Additional Guidance about the Unit** |
|---|

| **Indicative Content:** |
|---|

| 1 | <ul><li>The importance of effective communication at work and the effects of poor communication</li><li>The stages in communication: sender – encoding – transmission – decoding – receiver</li><li>Possible barriers to communication and methods to overcome them</li><li>Ways to ensure effective communication in the workplace</li><li>Different types of communication including oral, written, visual, and electronic and their relative advantages and disadvantages</li><li>Techniques of face-to-face and indirect communication, and when each is appropriate</li><li>How to use feedback to check effectiveness of communication</li></ul> |
|---|---|
| 2 | <ul><li>The five human senses, and how to use them effectively in the workplace</li><li>Active listening skills</li><li>Focused and wide angle observation for data gathering in the workplace</li><li>Perception and its effects on the interpretation of data</li><li>Significance of non-verbal communication and body language</li></ul> |

| Title: | Influencing others at work (M3.31) | |
|---|---|---|
| Level: | 3 | |
| Credit value: | 1 | |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) | |
|---|---|---|
| 1    Understand the value of networking | 1.1 | Explain the value to the first line manager of networking |
| | 1.2 | Identify an appropriate network for a first line manager and describe methods to establish and maintain effective professional relationships with the identified network |
| 2    Know how to influence and negotiate with others to achieve objectives | 2.1 | Explain the general principles of negotiation |
| | 2.2 | Explain a relevant technique for influencing others to achieve workplace objectives |
| | 2.3 | Describe how to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of influencing others as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: D1 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |

| Units available from | 01/01/2008 |
|---|---|
| Unit guided learning hours | 6 |

| **Additional Guidance about the Unit** |
|---|
| **Indicative Content:** |

| 1 | • Nature, purpose and value of networking<br>• Identification of relevant networks<br>• Effective networking practices and skills<br>• Network and contact creation<br>• Methods to establish and maintain effective professional relationships at various levels |
|---|---|
| 2 | • Formal and informal negotiation<br>• Negotiation strategy, tactics and behaviour<br>• Non-verbal communication and social skills<br>• Techniques for influencing others<br>• Value systems and other barriers to acceptance<br>• Conflict and its resolution to achieve a win-win situation<br>• Levels of power and authority, and the impact on negotiation |

| Title: | Communicating one-to-one at work (M3.32) |
|---|---|
| **Level:** | 3 |
| **Credit value:** | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1   Understand the impact of non-verbal communication | 1.1   Identify a range of non-verbal behaviours which can affect people in the workplace |
| 2   Understand the importance of one-to-one communication | 2.1   Explain the importance of one-to-one communication<br>2.2   List <u>two</u> methods of direct communication used in the workplace<br>2.3   Explain the importance of succinct and accurate records of one-to-one oral communication |
| 3   Know how to conduct interviews in the workplace | 3.1   Explain how they could prepare for and plan an interview for a specific situation in own organisation<br>3.2   Explain how to conduct interviews effectively, lawfully and ethically<br>3.3   Explain how they would evaluate that the interview had been conducted effectively, lawfully and ethically<br>3.4   Decide what record keeping is required for the type of interview<br>3.5   Explain how they would provide feedback to the interviewee where appropriate |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of one-to-one communication as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: C2, D1, D6, D7, F6, F8 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |

| Location of the unit within the subject/sector classification system | Business Management |
| --- | --- |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 9 |

**Additional Guidance about the Unit**

**Indicative Content:**

1
- Effects of attitudes, perception and cultures on the interpretation of non-verbal messages
- Range of non-verbal behaviours which can affect people in the workplace

2
- Aspects of face-to-face communication, including appearance, impact, body language
- Consideration of the recipient's needs
- A range of direct communication methods relevant to the workplace, such as counselling and disciplinary interviewing
- Realisation that choice of communication method is political and cultural
- Range of direct communication methods relevant to people outside own area of responsibility, including written, telephone, e-mail and face-to-face discussions
- The importance of succinct and accurate records of one-to-one oral communication

3
- Interview types – formal and informal, including selection, exit, grievance, disciplinary, counselling, appraisal, supervision and information gathering/investigation
- Appropriate climate for conducting interviews
- Structure and format of interviews according to purpose
- Legal and ethical considerations in relation to interviewing
- Questioning and listening techniques
- Impact of non verbal communication
- Ways to analyse and interpret information
- Recording information and interview outcomes
- The importance of feedback

| Title: | Effective meetings for managers (M3.33) |
|---|---|
| Level: | 3 |
| Credit value: | 2 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1    Know how to manage and contribute to a meeting | 1.1    Explain the purpose of an agenda<br>1.2    Describe how to prepare prior to a meeting<br>1.3    Explain the roles and responsibilities of the chairperson, the secretary and individuals at a meeting<br>1.4    Explain basic meeting protocol and procedures<br>1.5    Explain the purposes of minutes and action plans<br>1.6    Review own effectiveness at meetings |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of meetings as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 4 |
| Additional Guidance about the Unit | |

| | **Indicative Content:** |
|---|---|
| 1 | <ul><li>The purpose, value and types of meeting</li><li>How to consult with others and prepare to contribute effectively to a meeting</li><li>How to organise a meeting (physical resources, agenda)</li><li>How to make an effective contribution to discussion/decision making during a meeting</li><li>Roles and responsibilities of the chairperson, the secretary and individuals at a meeting</li><li>Purposes of minutes and action plans</li><li>The importance of follow-up procedures after a meeting and how to use action plans to do so</li><li>Review of own effectiveness at meetings</li><li>Supervised practice or simulation to develop the ability to apply knowledge and skills</li></ul> |

| Title: | Understanding workplace information systems (M3.34) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1 Understand the need to maintain information systems | 1.1 Explain the purpose of record-keeping for the organisation<br>1.2 Identify key information to be recorded to meet organisational and legal requirements<br>1.3 Identify appropriate systems to store and retrieve information<br>1.4 Explain the need to control data access<br>1.5 Identify records which are included under relevant legislation (for example the Data Protection Act of 1998) |
| 2 Understand the use and application of IT applications in an organisation | 2.1 Identify different uses or applications of spreadsheets and/or databases in the organisation<br>2.2 Explain the value of electronic communication methods<br>2.3 Describe the back-up system for IT applications in the organisation |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of information systems as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |

| Availability for use | Restricted to ILM |
|---|---|
| Units available from | 01/01/2008 |
| Unit guided learning hours | 6 |

| **Additional Guidance about the Unit** | |
|---|---|
| **Indicative Content:** | |
| 1 | <ul><li>The purpose of record-keeping for the organisation including legal requirements</li><li>How to identify the essential content of records needed for internal and external use</li><li>Storage, indexing and information retrieval systems (manual and IT, as appropriate)</li><li>Confidentiality/security of records (level of access, backup, virus protection, legal aspects)</li></ul> |
| 2 | <ul><li>Basics of using spreadsheets</li><li>Basics of using databases</li><li>Advantages and disadvantages of e-mail, internet and intranet</li><li>The method of IT backup within an organisation</li></ul> |

| Title: | Marketing for managers (M3.35) |
|---|---|
| Level: | 3 |
| Credit value: | 1 |

| Learning outcomes (the learner will) | Assessment criteria (the learner can) |
|---|---|
| 1    Understand basic marketing concepts | 1.1    Explain the marketing concept and why it is relevant for managers<br>1.2    Conduct a simple organisational SWOT analysis in the marketing context<br>1.3    Describe the four elements of the marketing mix and give an example of how each is used within the context of the organisation |

| Additional information about the unit | |
|---|---|
| Unit purpose and aim(s) | To develop knowledge and understanding of information systems as required by a practising or potential first line manager. |
| Unit review date | 31/12/2014 |
| Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate) | Links to Management & Leadership 2008 NOS: B6, D3 |
| Assessment requirements or guidance specified by a sector or regulatory body (if appropriate) | |
| Support for the unit from a sector skills council or other appropriate body (if required) | Council for Administration (CfA) |
| Location of the unit within the subject/sector classification system | Business Management |
| Name of the organisation submitting the unit | Institute of Leadership & Management |
| Availability for use | Restricted to ILM |
| Units available from | 01/01/2008 |
| Unit guided learning hours | 4 |
| Additional Guidance about the Unit | |
| **Indicative Content:** | |

| 1 | <ul><li>Simple definition of marketing and its relevance to managers</li><li>The idea of the Marketing Mix (product, price, place and promotion, and 7P model for services) and its relevance</li><li>Nature and role of market segmentation</li><li>Simple organisational SWOT analysis in the marketing context</li><li>Outline of market planning and its purpose</li><li>Sales promotion and advertising methods</li><li>Public and customer relations activities</li></ul> |
|---|---|

# A P P E N D I X B

# ASSESSMENTS FOR MANDATORY UNITS FOR THE LEVEL 3 AWARD, CERTIFICATE AND DIPLOMA IN FIRST LINE MANAGEMENT

**WORK-BASED ASSIGNMENT: M3.01**

| Centre Number: | Centre Name: |
|---|---|
| Learner Registration No: | Learner Name: |

**TASK**

Identify a workplace problem facing you or your team (or a team within another organisation if you are currently unemployed) and examine ways to resolve it.

*For the purposes of this assignment, 'problem' may be interpreted as 'a deviation from the norm' OR 'an improvement opportunity' OR 'a potential or anticipated problem'.*

The 'nominal' word count for this assignment is 1200 words; the suggested range is between 1000 and 2000 words. Check your assignment carefully prior to submission using the assessment criteria.

| *Please use the headings shown below when writing up your Assignment* | **Assessment Criteria** |
|---|---|
| **Background** <br><br> Briefly describe your organisation, what it does, and your role within it <br><br> *(min 2 marks required from 4 available)* | • Context of assignment was provided |
| **Description of the problem** <br><br> Describe the problem, its nature, scope and impact <br><br> *(min 8 marks required from 16 available)* | • The problem, its nature, scope and impact are described |
| **Analysis of the problem** <br><br> Gather and interpret information to identify possible options to solve the problem <br><br><br> *(min 12 marks required from 24 available)* | • Information to identify possible solutions to a problem is gathered and interpreted |
| **Resolution of the problem** <br><br> Clearly state what you hope to achieve <br><br> Generate and examine **options** for solving the problem using simple decision making technique(s) to arrive at the best solution <br><br> State your chosen solution clearly and concisely <br><br> Make sure that in this evaluation you identify any resource implications <br><br> *(min 15 marks required from 30 available)* | • Briefly summarised the options providing facts and evidence not just opinion <br> • Used at least one simple decision making technique to evaluate options to arrive at the best solution |
| **Implementation and communication of the solution** <br><br> Provide an action plan for the implementation and communication of the solution <br><br> Briefly describe the monitoring and review techniques you could use to evaluate the effectiveness of outcomes <br><br> *(min 13 marks required from 26 available)* | • Planned the implementation and communication of the decision <br> • Briefly described which monitoring and review techniques which could be used to evaluate outcomes |
| By submitting I confirm that this assessment is my own work | |

**MARK SHEET: SOLVING PROBLEMS AND MAKING DECISIONS: M3.01: WORK-BASED ASSSIGNMENT**

| Centre Number: | Centre Name: |
|---|---|
| Learner Registration No: | 1. Learner named below confirms authenticity of submission.<br>2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.<br>However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □ |

| Criteria | Strengths | Areas for Improvement | Assr mark | QA mark |
|---|---|---|---|---|
| **Background**<br><br>• Context of assignment was provided | | | / 4 marks (min 2) | |
| **Description of the problem**<br><br>• The problem, its nature, scope and impact are described | | | / 16 marks (min 8) | |
| **Analysis of the problem**<br><br>• Information to identify possible solutions to a problem is gathered and interpreted | | | / 24 marks (min 12) | |
| **Resolution of the problem**<br><br>• Briefly summarised the options providing facts and evidence not just opinion<br><br>• Used at least one simple decision making technique to evaluate options to arrive at the best solution | | | / 30 marks (min 15) | |
| **Implementation and communication of the solution**<br><br>• Planned the implementation and communication of the decision<br><br>• Briefly described which monitoring and review techniques which could be used to evaluate outcomes | | | / 26 marks (min 13) | |

| Assessor's decision | | Quality assurance use | |
|---|---|---|---|
| **Total marks** | **Outcome** *(circle as applicable)* | **Total marks** | **Outcome** *(circle as applicable)* |
| **Total 50 + overall, AND minimum in each section** | **PASS/REFERRAL** | **Total 50 + overall, AND minimum in each section** | **PASS/REFERRAL** |
| **Section referral if applicable:** | | **Date of IQA check:** | |

| Name of assessor: | Name of IQA: |
|---|---|
| Assessor signature and date: | IQA signature: |
| ILM EV signature: | Date externally verified (where applicable): |

## CHANGE MANAGEMENT REPORT: M3.02; M3.03; M3.04

| Centre Number: | Centre Name: |
|---|---|
| Learner Registration No: | Learner Name: |

Examine factors that may require your organisation to change, and identify a change required in the workplace that will benefit the organisation. If you are not currently working within an organisation, then you may complete this task in relation to an organisation with which you are familiar. This could include experience working in a voluntary capacity.

You should discuss the choice of topic and an outline of your submission with your line manager and/or your tutor. The choice of topic must allow you to demonstrate achievement of assessment criteria from the units studied. It should not be a very large or complex topic, but it must offer scope for planning change – perhaps it is a change in working methods, customer service or working relationships.

**TASK**

Write a report to your line manager about a change that is needed which could be implemented in the near future. The 'nominal' word count for this assignment is 2000 words: the suggested range is between 1500 and 3000 words.

| *Please use the headings shown below when writing up your Assignment* | **Assessment Criteria** |
|---|---|
| **Background** <br><br> Briefly describe your organisation, what it does, and your role within it <br><br> Give examples of quality standards from your area of work and briefly explain the importance of quality and continuous improvement for your organisation <br><br> *(min 5 marks required from 10 available)* | • Context for report is provided <br> • The organisation's quality standards are identified <br> • The importance of quality awareness and the need to continuously improve the organisation is explained |
| **Identify a change that is required** <br><br> Identify factors that may require the organisation to change <br><br> Based on these factors identify a change required in the workplace and explain the potential benefits of this change to the organisation <br><br> *(min 7 marks required from 14 available)* | • Forces that may require change in the organisation are identified by conducting a simple SWOT and/or PESTLE analysis <br> • An example is given of change required in the workplace reflecting the SWOT and/or PESTLE analysis <br> • The benefits of innovation and change for the organisation are explained |
| **Planning and monitoring the change** <br><br> State the objectives of the change in order of their priority. At lease one must be a SMART objective <br><br> Prepare an action plan for implementing the change <br><br> Explain the technique you would use to monitor the achievement of the primary objective <br><br> *(min 15 marks required from 30 available)* | • SMART objectives are set, listed in order of priority and appropriate time scales set for their achievement <br> • Objectives are planned using an established time management technique <br> • A technique for planning change within the context of the example given is used <br> • The monitoring technique for any objective is explained |

| **Implications of the change**<br><br>Explain the possible financial effects of the change on the organisation<br><br>Explain the possible effects on people in the organisation<br><br>Identify any potential barriers to change and suggest practical ways of overcoming these<br><br><br><br>*(min 13 marks required from 26 available)* | • Relevant human and financial factors in the consideration of change are identified<br>• Possible human and financial effects of change upon people, departments and the organisation is explained<br>• Constraining or limiting factors that could hinder the achievement of any one objective are identified<br>• The barriers to change and innovation in the workplace and practical ways of overcoming these are explained |
|---|---|
| **Communicating and implementing the change**<br><br>Identify who needs to know about the change, describe how you will communicate with them and explain why it is important to communicate the change to them<br><br>Explain how you will continually improve once the change has been implemented. Explain how you will involve your team in doing this, and identify which tools or techniques you could use and how you would evaluate these improvement activities.<br><br><br><br>*(min 10 marks required from 20 available)* | • Communication with and involvement of people to facilitate effective change are explained<br>• The importance of communication in successful implementation of change is explained<br>• Ways of involving the team in quality and continuous improvement are explained<br>• A continuous improvement tool or technique relevant to the workplace is used<br>• Ways to evaluate continuous improvement activities are discussed |
| By submitting I confirm that this assessment is my own work ||

**MARK SHEET: M3.02, M3.03, M3.04: CHANGE MANAGEMENT REPORT**

| Centre Number: | Centre Name: |
|---|---|

| Learner Registration No: | 1. Learner named below confirms authenticity of submission. 2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed. However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: ☐ |
|---|---|

| Criteria | Strengths | Areas for Improvement | Assr mark | QA mark |
|---|---|---|---|---|
| **Background**<br>• Context for report is provided<br>• The organisation's quality standards are identified<br>• The importance of quality awareness and the need to continuously improve the organisation is explained | | | / 10 marks (min 5) | |
| **Identify a change that is required**<br>• Forces that may require change in the organisation are identified by conducting a simple SWOT and/or PESTLE analysis<br>• An example is given of change required in the workplace reflecting the SWOT and/or PESTLE analysis<br>• The benefits of innovation and change for the organisation are explained | | | / 14 marks (min 7) | |
| **Planning and monitoring the change**<br>• SMART objectives are set, listed in order of priority and appropriate time scales set for their achievement<br>• Objectives are planned using an established time management technique<br>• A technique for planning change within the context of the example given is used<br>• The monitoring technique for any objective is explained | | | / 30 marks (min 15) | |
| **Implications of the change**<br>• Relevant human and financial factors in the consideration of change are identified<br>• Possible human and financial effects of change upon people, departments and the organisation is explained<br>• Constraining or limiting factors that could hinder the achievement of any one objective are identified<br>• The barriers to change and innovation in the workplace and practical ways of overcoming these are explained | | | / 26 marks (min 13) | |

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|---|---|---|

| Communicating and implementing the change | | | | |
|---|---|---|---|---|
| • Communication with and involvement of people to facilitate effective change are explained<br>• The importance of communication in successful implementation of change is explained<br>• Ways of involving the team in quality and continuous improvement are explained<br>• A continuous improvement tool or technique relevant to the workplace is used<br>• Ways to evaluate continuous improvement activities are discussed | | | / 20 marks (min 10) | |

| Assessor's decision | | Quality assurance use | |
|---|---|---|---|
| **Total marks** | **Outcome** *(circle as applicable)* | **Total marks** | **Outcome** *(circle as applicable)* |
| **Total 50 + overall, AND minimum in each section** | **PASS/REFERRAL** | **Total 50 + overall, AND minimum in each section** | **PASS/REFERRAL** |
| **Section referral if applicable:** | | **Date of IQA check:** | |
| **Name of assessor:** | | **Name of IQA:** | |
| **Assessor signature and date:** | | **IQA signature:** | |
| **ILM EV signature:** | | **Date externally verified (where applicable):** | |

## INNOVATION PROJECT: M3.05; M3.06; M3.07; M3.08

| Centre Number: | Centre Name: |
|---|---|
| **Learner Registration No:** | **Learner Name:** |

Write an innovation project report within the context of your organisation or if you are currently unemployed in an organisation with which you are familiar. This could include experience working in a voluntary capacity.

The content should focus on an innovation action/activity within your organisation that will assist in achieving organisational success and enhanced customer satisfaction.

Your submission should include:
- A front page showing the title of the report that includes your name
- A table of contents wherein you list the headings, sub-headings and page numbers. Appendices should also be listed (numbered or lettered)
- A summary or synopsis (*which is written **last***). It should catch the reader's interest and focus attention on the important points in your report such as the purpose, the key outcomes and your recommendations
- The body of the report
- Appendices that may include a glossary of any technical terms or jargon you have used, or supporting evidence arising from the investigation, which is not appropriate to include in the main body of the report

Include basic statistics and visual material in the content or in an appendix and use an appropriate tone, language and level of formality in your report. The 'nominal' word count for this assignment is 3000 words: the suggested range is between 2500 and 5000 words.

Once you have completed the innovation project report check that your work measures up to the assessment criteria – try marking it yourself before submitting it.

| *Please use the headings shown in bold below when writing up the Report* | **Assessment Criteria** |
|---|---|
| **Background**<br><br>Briefly describe the organisation, what it does and your role within it<br><br>*(min 2 marks required from 4 available)* | • Context of assignment is provided |
| **Customers and their needs**<br><br>Describe your customers, their rights and needs, and your organisation's responsibility and commitments to them<br><br>Explain how your organisation measures and monitors customer satisfaction<br><br><br><br><br><br><br><br>*(min 10 marks required from 20 available)* | • An external and an internal customer of the organisation was identified<br>• The customers needs were identified<br>• At least two legal rights of customers were described<br>• Two of the organisation's commitments to customers were described<br>• The manager's responsibilities in relation to customer service was briefly described<br>• Customer service standards and procedures used to meet customer needs were explained<br>• How customer service is monitored against the standards set is explained |
| **Investigate how well you meet your customers needs** | • Data collection techniques were used to gather information from external, internal and internet sources |

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|---|---|---|

| | |
|---|---|
| Use a questionnaire and any other relevant techniques to identify how well you meet the needs of your customers and explain your methodology for<br>• the design of your questionnaire<br>• the sampling technique you used<br>• the method you used to administer your questionnaire<br>• the technique you used to analyse the results<br><br><br><br>*(min 10 marks required from 20 available)* | • The validity and accuracy of information gathered was checked<br>• A simple basic workplace questionnaire including a minimum of <u>four</u> different types of questions was designed<br>• A representative sampling technique was described<br>• The questionnaire administration was briefly described<br>• A simple technique for analysing the results of the questionnaire was described<br>• Information was analysed and conclusions were drawn |
| **The innovation process**<br><br>Identify opportunities for potential improvement in the products and services your team provide. This should be linked to the current assessment of how well you are meeting your customers needs and expectations highlighted by your investigation. To achieve this undertake and describe activities to encourage creative and innovative ideas among team members<br>Outline the process used and the outcomes including:<br>• the technique used to encourage creative ideas<br>• the barriers encountered from others<br>• how commitment was gained from others<br>• how the various ideas put forward by others were evaluated<br><br> *(min 13 marks required from 26 available)* | • A technique was used to encourage creative ideas amongst the team<br>• Barriers to creative thinking and resistance to innovation within the team were explained<br>• Creative and innovative ideas were evaluated |
| **Recommendations**<br><br>Based upon your investigation and the innovation process make reasoned recommendations for improvements. Explain actions you can take that will assist in making the innovation a reality including explaining how you will gain the commitment and support of the key stakeholders<br><br><br><br>*(min 10 marks required from 20 available)* | • Gaining the commitment of others in moving creative ideas forward was explained |
| **Specifications for the report**<br>Ask yourself the following questions:<br><br>• Did you write the report using the headings shown in bold?<br>• Did you include basic statistics and visual material in the content or in an appendix? | • A report is written to meet specified standards and within defined terms of reference<br>• Basic statistics and visual material is included in the content or in an appendix<br>• Effective and appropriate tone, language and level of formality is used |

| • Did you use the appropriate tone, language and level of formality? | in the report |
|---|---|
| *(min 5 marks required from 10 available)* | |
| By submitting I confirm that this assessment is my own work ||

## MARK SHEET: M3.05, M3.06, M3.07, M3.08: INNOVATION PROJECT

| Centre Number: | Centre Name: |
|---|---|
| Learner Registration No: | 1. Learner named below confirms authenticity of submission.<br>2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.<br>However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □ |

| Criteria | Strengths | Areas for Improvement | Assr mark | QA mark |
|---|---|---|---|---|
| **Background**<br><br>• Context of assignment is provided | | | / 4 marks (min 2) | |
| **Customers and their needs**<br><br>• An external and an internal customer of the organisation was identified<br>• The customers needs were identified<br>• At least two legal rights of customers were described<br>• Two of the organisation's commitments to customers were described<br>• The manager's responsibilities in relation to customer service was briefly described<br>• Customer service standards and procedures used to meet customer needs were explained<br>• How customer service is monitored against the standards set is explained | | | / 20 marks (min 10) | |
| **Investigate how well you meet your customers needs**<br><br>• Data collection techniques were used to gather information from external, internal and internet sources<br>• The validity and accuracy of information gathered was checked<br>• A simple basic workplace questionnaire including a minimum of <u>four</u> different types of questions was designed<br>• A representative sampling technique was described<br>• The questionnaire administration was briefly described<br>• A simple technique for analysing | | | | |

| | | | | |
|---|---|---|---|---|
| the results of the questionnaire was described<br>• Information was analysed and conclusions were drawn | | | / 20 marks (min 10) | |
| **Innovation process**<br><br>• A technique was used to encourage creative ideas amongst the team<br>• Barriers to creative thinking and resistance to innovation within the team were explained<br>• Creative and innovative ideas were evaluated | | | / 26 marks (min 13) | |
| **Recommendations**<br><br>• Gaining the commitment of others in moving creative ideas forward was explained | | | / 20 marks (min 10) | |
| **Specifications of the report**<br><br>• A report is written to meet specified standards and within defined terms of reference<br>• Basic statistics and visual material is included in the content or in an appendix<br>• Effective and appropriate tone, language and level of formality is used in the report | | | / 10 marks (min 5) | |

| Assessor's decision | | Quality assurance use | |
|---|---|---|---|
| **Total marks** | **Outcome** *(circle as applicable)* | **Total marks** | **Outcome** *(circle as applicable)* |
| **Total 50 + overall, AND minimum in each section** | **PASS/REFERRAL** | **Total 50 + overall, AND minimum in each section** | **PASS/REFERRAL** |
| **Section referral if applicable:** | | **Date of IQA check:** | |
| **Name of assessor:** | | **Name of IQA:** | |
| **Assessor signature and date:** | | **IQA signature:** | |
| **ILM EV signature:** | | **Date externally verified (where applicable):** | |

## BRIEFING/PRESENTATION: M3.09

| Centre Number: | Centre Name: |
|---|---|
| **Learner Registration No:** | **Learner Name:** |

Plan and deliver a briefing or presentation about a management topic of your choice. You could use the content of another unit as your topic. Your presentation should be at least 7 minutes, but no longer than 10 minutes

| *Please use the headings shown in bold below when writing up the Report* | **Assessment Criteria** |
|---|---|
| **Prior to the briefing/presentation**<br><br>Identify a management topic and list objectives for your briefing. Select appropriate information in line with your objectives.<br><br>Arrange your information in a logical and sequential manner<br><br>Design a simple self evaluation form<br><br>*(min 15 marks required from 30 available)* | • Appropriate information is selected in line with the objectives of the briefing/presentation<br>• The content of the briefing or presentation is logically structured<br>• A simple evaluation form is designed |
| **Delivery of the briefing/presentation**<br><br>Deliver your briefing/presentation in a confident manner ensuring that you:<br>• Introduce your topic clearly<br>• Use appropriate presentation techniques and aids<br>• Present your information clearly<br>• Keep to time<br>• Use feedback to check understanding from your audience<br><br>*(min 35 marks required from 70 available)* | • An appropriate management topic is clearly introduced<br>• Use if made of appropriate presentation techniques and aids to enhance understanding of the topic<br>• Information is clearly presented<br>Confidence in the subject matter is displayed<br>• Learner kept to time |
| By submitting I confirm that this assessment is my own work ||

## MARK SHEET: M3.09: BRIEFING/PRESENTATION

| Centre Number: | Centre Name: |
|---|---|
| Learner Registration No: | 1. Learner named below confirms authenticity of submission.<br>2. ILM uses learners' submissions – on an anonymous basis – for assessment standardisation. By submitting, I agree that ILM may use this script on condition that all information which may identify me is removed.<br>However, if you are unwilling to allow ILM use your script, please refuse by ticking the box: □ |

| Criteria | Strengths | Areas for Improvement | Assr mark | QA mark |
|---|---|---|---|---|
| **Prior to the briefing/presentation**<br><br>• Appropriate information is selected in line with the objectives of the briefing/presentation<br>• The content of the briefing or presentation is logically structured<br>• A simple evaluation form is designed | | | / 30 marks (min 15) | |
| **Delivery of the briefing/presentation**<br><br>• An appropriate management topic is clearly introduced<br>• Use if made of appropriate presentation techniques and aids to enhance understanding of the topic<br>• Information is clearly presented Confidence in the subject matter is displayed<br>• Learner kept to time | | | / 70 marks (min 35) | |

| Assessor's decision | | Quality assurance use | |
|---|---|---|---|
| **Total marks** | **Outcome** *(circle as applicable)* | **Total marks** | **Outcome** *(circle as applicable)* |
| **Total 50 + overall, AND minimum in each section** | **PASS/REFERRAL** | **Total 50 + overall, AND minimum in each section** | **PASS/REFERRAL** |
| **Section referral if applicable:** | | **Date of IQA check:** | |
| **Name of assessor:** | | **Name of IQA:** | |
| **Assessor signature and date:** | | **IQA signature:** | |
| **ILM EV signature:** | | **Date externally verified (where applicable):** | |

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# A P P E N D I X - C

# SUGGESTED OUTLINE ASSESSMENTS FOR OPTIONAL UNITS FOR THE LEVEL 3 AWARD, CERTIFICATE AND DIPLOMA IN FIRST LINE MANAGEMENT

*Note: Assessments in a ready to use format are available to download from the ILM website.*

| M3.02 | Understanding change in the workplace |
|---|---|

**Reflective Review**

**The benefits and barriers to change**
Look at a change that has taken place in the recent past in the organisation and using this example explain:
- The benefits of this change to your organisation
- The barriers to the change and practical ways that these were/or could have been overcome

**Effectiveness of communication**
Look at a change that has taken place in the recent past and using this example explain how well the change was communicated to people in the workplace

**Human and financial effects**
Look at a change that has taken place in the recent past and using this example explain the possible human and financial effects that the change had upon people, departments and the organisation

**Assessment Criteria**

- The benefit of innovation and change for the organisation is explained
- The barriers to change and innovation in the workplace are identified and practical ways of overcoming these barriers is explained
- The importance of communication in successful implementation of change is explained
- Possible human and financial effects of change upon people, departments and the organisation is explained


| M3.03 | Planning change in the workplace |
|---|---|

**Work-based Assignment**

**Identifying a change in the organisation**
Carry out a simple SWOT and/or PESTLE analysis to identify a change that is needed in your organisation. Identify any service standards that relate to this proposed changed

**Implications of the change**
Identify what financial implications this proposed change would have for the organisation and its potential impact on people

**Plan the change**
Use a relevant technique (eg a Gantt chart or network plan) to plan the implementation of this proposed change

**Communicating the change**
Explain how you could communicate your proposed change to people and involve them in facilitating the change

**Continuous improvement**
Explain the need for the organisation to continuously improve, how you would involve your team in continuous improvement activities, what tools you would use and how you would evaluate improvement activities

**Assessment Criteria**

- A simple PESTLE and/or SWOT analysis was conducted to identify the forces that may require organisational change
- An example of change required in the workplace is given reflecting the SWOT and/or PESTLE analysis
- The organisation's quality standards are identified
- Relevant human and financial factors in the consideration of change are identified
- A technique for planning change within the context of the example is used
- Communication with and involvement of people to facilitate effective change is explained
- The importance of quality awareness and the need to continuously improve the organisation is explained
- A continuous improvement tool or technique relevant to the workplace is used
- Ways of involving the team in quality and continuous improvement is explained
- Ways to evaluate continuous improvement activities are discussed

| M3.04 | Achieving objectives through time management |
|---|---|

**Work-based Assignment**

Set SMART objectives for your own workload, listing them in order of priority and plan their achievement, with appropriate, timescales for their achievement. Plan the achievement of the objectives using an established time management technique. Identify any factors that could stop you achieving any <u>one</u> of your objectives and briefly explain how you will monitor the achievement of any <u>one</u> of the objectives.

**Assessment Criteria**

- SMART objectives set for own workload and listed in order of priority with established time scales for their achievement
- The achievement of objectives is planned using an established time management technique
- Constraining or limiting factors that could hinder the achievement of any one of these objectives is identified
- The monitoring techniques for an objective is explained

| M3.05 | Writing for business |
|---|---|

**Report**

Write a report on a management problem that has been **agreed** with your tutor. If you use the content of another unit as your topic, then the assessment criteria for both units apply.

Your report should include the headings shown in bold and basic statistics and visual material, either in the content or in an appendix. Use an appropriate tone, language and level of formality in your report

**Background**
Briefly describe the organisation, what it does and your role within it
**Introduction**
Write an introduction that includes some or all of the following:
- A brief description of a management problem
- The background, circumstances or history of your topic
- Any explanations where necessary
**Investigation (or Methodology)**
Investigate the problem and identify possible solutions to the problem. Use basic statistics and visual material in the content or in an appendix
**Evaluation possible solutions**
Evaluate your options to arrive at the best solution
**Recommendations**
Provide a clear statement of your proposed solution and provide an action plan for implementing your recommendation
**Appropriate tone, language and level of formality**
Ensure that you have used suitable language, tone and level of formality in the report

**Assessment Criteria**

- A report is written to meet specified standards
- Basic statistics and visual material is included in the content or in an appendix
- Effective and appropriate tone, language and level of formality is used in the report

| M3.06 | Managing creativity and innovation in the workplace |
|---|---|

**Work-based Assignment**

**Creativity and Innovation**

Lead a group of people in generating creative ideas relevant to your workplace, employing an appropriate technique. Having done this, review your own performance and the ideas that were generated, and identify anything you would do to improve the process in future. Your review should consider:
- How effective the technique was in encouraging creative ideas
- Any barriers to creative thinking and resistance to innovation that were apparent
- Which if any of these ideas you would like to take forward at work, and why
- How you would gain the commitment of managers and others in your organisation in moving any of the creative ideas forward

**Assessment Criteria**

- A technique was used to encourage creative ideas amongst team members
- Barriers to creative thinking and resistance to innovation within the team is explained
- Gaining the commitment of others in moving creative ideas forward is explained
- Creative and innovative ideas are evaluated and reasoned recommendations made to managers and others

| M3.07 | Obtaining information for effective management |
|---|---|

**Work-based Assignment**

**Workplace questionnaire**
Plan and prepare a simple survey in your workplace on a topic that is relevant to you and your role. In doing this you should:
- Briefly gather information relating to the topic using basic data collection techniques (questions, observation, surveys, source records, etc), from external, internal and internet sources, to help you develop your questionnaire. Check the validity of the information that you gathered.
- Design a simple workplace questionnaire that includes a minimum of <u>four</u> different types of questions

**Representative sampling and administration**
Describe how you would ensure representative sampling and how you would administer your workplace questionnaire

**Evaluation of results**
Briefly describe how you would analyse the results of your questionnaire to identify the information you require

**Assessment Criteria**

- Information relating to the topic was gathered using basic data collection techniques from external, internal and internet sources
- The validity and accuracy of information gathered was checked
- Information gathered is analysed and conclusions drawn
- A simple workplace questionnaire is designed that includes a minimum of <u>four</u> different types of questions
- A representative sampling technique is described
- The way that the questionnaire could be administered is described
- A simple technique for analysing the results of the questionnaire is described

| M3.08 | Managing customer service |
|---|---|

**Work-based Assignment**

**Understanding basic customer service**
You should describe your organisation's customer service by briefly describing at least two legal rights of your customers, two of your organisation's commitments to customers and the manager's responsibilities in relation to customer service
**Caring for the customer**
You should also describe how your organisation cares for its customers. To do this, identify an internal and an external customer, and explain how customer service standards and procedures are used to meet their needs. In addition, explain how customer service is monitored against the standards set by your organisation

**Assessment Criteria**

- Two legal rights of customers are described
- Two of the organisations' commitments to customers are described
- The managers' responsibilities in relation to customer service is described
- The needs of an internal and an external customer is described
- How customer needs are identified is described
- The use of service standards and procedures to meet customer needs is explained
- Customer service monitoring against set standards is explained

| M3.09 | Giving briefings and making presentations in the workplace |
|---|---|

**Presentation**

Plan and deliver a briefing or presentation on a management topic of your choice, and collect written feedback on your performance. In doing this, you should ensure that you:
- Select appropriate information in line with your topic and objectives
- Logically structure the content of your presentation/briefing
- Introduce your topic clearly
- Use appropriate presentation techniques and aids
- Present information clearly
- Display confidence in the subject matter
- Keep to time
- Use feedback to check understanding from your audience
- Design a simple evaluation form

**Assessment Criteria**

- Appropriate information is selected in line with the objectives of the briefing or presentation
- The structure of the content of the briefing or presentation is logical
- The topic is clearly introduced
- Appropriate presentation techniques and aids are used
- The information is presented clearly
- The learner displayed confidence in the subject matter
- The learner kept to the time allocated
- The learner used feedback to check understanding
- The learner designed a simple evaluation form

| M3.10 | Introduction to leadership |
|---|---|

**Reflective Review**

Identify factors at work that will influence your choice of leadership styles and explain why your leadership styles are likely to positively affect your team

Assess your own leadership behaviours and potential by referring to a relevant leadership model, your organisation's working practices, and by collecting feedback from others. Describe what actions you could take to improve as a leader

**Assessment Criteria**

- The factors that will influence your choice of leadership styles or behaviours in workplace situations is identified
- The reason why these leadership styles or behaviours are likely to have a positive effect on individual and group behaviour is explained
- Own leadership behaviours and potential assessed in the context of a particular leadership model and organisation's working practices and culture using feedback from others
- Appropriate actions to enhance own leadership behaviour in the context of a particular leadership model is described

| M3.11 | Building the team |
|---|---|

**Work-based Assignment**

Explain how you develop and maintain trust at work and why confidentiality is so important in building and maintaining trust at work

Describe the difference between a group and a team using examples from your workplace to illustrate this difference

Briefly describe the stages of an established model of group formation (using examples from your experience to illustrate these, if possible)

 *Note: If this is not possible describe the stages of an established model of group formation*
Explain the benefits of knowing your team members' preferred team roles

**Assessment Criteria**

- Behaviours which could develop and maintain trust at work are explained
- The reason why confidentiality is important in building and maintaining trust in the team is explained
- One example of a group and one example of a team within the workplace is given
- Justification is provided for the classification of the examples given
- The stages of an established model of group formation is briefly described
- The way that a manager could benefit from knowing team members' preferred team roles is explained

| M3.12 | Motivating to perform in the workplace |
|---|---|

**Work-based Assignment**

Describe your organisation's formal systems of assessment/appraisal, and your own informal practices. Explain the value of each and identify ways that you ensure that it is fair and objective, or suggest any changes that would ensure that it is.

Briefly describe the factors that influence the way that people in your workplace behave and, based on this, explain how you would apply one recognised theory of motivation to your team to improve their performance.

Explain why feedback is important to improve communication and the performance of your team and compare the effectiveness of different types of feedback used in your workplace

**Assessment Criteria**

- The value of formal and informal performance assessment in the workplace is explained
- Ways that could ensure fair and objective formal assessment are identified
- The factors that influence how people behave at work is outlined
- The application of one basic recognised theory of motivation is explained
- The importance of feedback to improve communication and performance is explained
- The effectiveness of different types of feedback is compared

| M3.13 | Developing yourself and others |
|---|---|

**Work-based Assignment**

Using at least one simple technique carry out a simple development needs analysis on yourself and one member of your team. Also identify your own and one other members of the team's learning styles. Record the outcomes and briefly outline the technique you used

Briefly analyse two learning/development options available to you, and two learning/development options available to the member of your team. Identify any barriers which might prevent any of these options being accomplished and explain how these barriers might be overcome. You should also describe support mechanisms that are available for both you and the member of your team.

Describe how you would monitor both your own development and the team member's development.

**Assessment Criteria**
- 
- At lease one simple technique for identifying own development needs and the development needs of one other member of the team is used
- Own learning style(s) and the learning style(s) of one other member of the team is identified
- Two learning/development options to meet the need(s) of self and one other member of the team are briefly analysed
- The barriers to learning are identified and an explanation given as to how these barriers can be overcome
- The support mechanisms for the development of self and one other member of the team are identified
- The methods used to monitor the development of self and one other member of the team is described

| M3.14 | Managing conflict in the workplace |
|---|---|

**Reflective Review**

Identify a conflict situation that you directly or indirectly experienced that affected others in the workplace. Explain what may have caused the conflict, describe the stages in the development of the conflict and explain the effects of the conflict on the performance of the team and individuals at work

Explain any recognised technique you used (or could have used) to minimise and resolve this conflict in your workplace and explain how you could create a positive atmosphere at work to minimise the adverse effects of conflict.

Note: If the conflict was one that you directly experienced explain how you dealt with it or how, with hindsight, you could have dealt with it to produce a better outcome. if you did not directly experience the conflict explain how those involved may have dealt with it

**Assessment Criteria**

- The causes of conflict at work are identified
- The stages in the development of conflict are described
- The effects of conflict on individual and team performance at work are explained
- Any recognised technique the manager could use to minimise and resolve conflict in the workplace is explained
- The way that a manager could create harmony at work and engender a positive atmosphere in order to minimise the adverse effects of conflict is described

| M3.15 | Managing stress in the workplace |
|---|---|

**Reflective Review**

Identify a situation at work where you or a colleague has felt under stress. Explain what caused this stress and examine its impact on your workplace

Note: If neither you nor a colleague has experienced any stress, you may choose to use the experience of a friend or relation who has experienced stress at work, or you may explain the general causes and impact of stress in organisations

Describe how you would recognise stress in yourself and in other members of your team and explain one practical stress management technique that you could use to overcome this stress in yourself or in your team

Outline the responsibilities your organisation's management has in relation to work related stress in your team, and explain how you could use counselling, advising or mentoring to provide support for individuals

Note: If you have had experience of using counselling, advising or mentoring, you should describe the circumstances. Otherwise, describe the conditions under which you would do so.

**Assessment Criteria**
- The causes and impact of stress in the organisation is examined
- The symptoms of stress in self and in others is described
- One practical stress management technique is explained
- Management responsibilities and actions in relation to work-related stress in the team are outlined
- How and when to use counselling, advising and mentoring to support individuals in the workplace is explained

| M3.16 | Managing the employment relationship |
|-------|--------------------------------------|

**Work-based Assignment**

Identify the main provisions of statutory requirements and your organisation's employment policies and procedures that guide you in good employment practices. (The statutory requirements and organisational policies should include the employment relationship, discrimination at work and fair employment)

Explain why diversity is important in your workplace and the consequences of not complying with diversity policies

Identify your organisation's employment policies and procedures that deal with disciplinary issues and describe how you monitor discipline in your team

Review your own ability to maintain discipline in the workplace by identifying your strengths and weaknesses in this aspect of your role

**Assessment Criteria**

- The main provisions of statutory requirements for the employment relationship, discrimination at work and fair employment are identified
- The organisation's employment policies and procedure that could guide the first line manager in managing diversity in the workplace are identified
- The importance of diversity in the workplace is explained
- The consequences of non compliance with diversity policies for own work area and for the organisation is explained
- The organisation's employment policies and procedures that could guide the first line manager in dealing with disciplinary issues are identified
- The ways that you could monitor discipline in the workplace is described
- The legal aspects of the disciplinary process is briefly described
- Own ability to maintain discipline in the workplace is reviewed

| M3.17 | Recruiting, selecting and inducting new staff in the workplace |
|-------|---------------------------------------------------------------|

**Work-based Assignment**

Note: For this task you will, ideally, be preparing to recruit someone for a post in your area of responsibility. If this opportunity does not occur, you should ask for the opportunity to be involved in the recruitment of someone for a post elsewhere in the organisation. If this is not possible, you should use the scenario of replacing any existing member of your team. Please identify which of these three options you have selected

Identify a post for which a new employee needs to be recruited. In order to recruit to this post you should:
- Identify your organisation's policies and procedures that could guide you in recruitment, selection and induction in the workplace
- Conduct a job analysis and prepare a job description and person specification for the post
- Explain how you would prepare for selection interviews to ensure impartiality and good decision making to ensure that the best person is selected
- Explain a recognised selection technique that could be used
- 
Having appointed someone to a post in your organisation, you should prepare a suitable induction for the new employee. You should:
- Explain the importance of effective induction
- Describe the phases of induction in your organisation
- Describe any legal and/or practical health and safety aspects that should be included in an induction for your workplace
- Explain one method that you could use to record the progress of an individual during induction in your workplace
- Explain how you could evaluate an induction process in your workplace

*Note: If your organisation does not have an established induction system, you should describe the phases of induction that you believe should be there*

**Assessment Criteria**

- The organisation's policies and procedures that could guide the first line manager in recruitment, selection and induction are identified
- A job analysis is conducted and a job description and person specification for a post within own area of responsibility
- The way that you would prepare for selection interviews to ensure impartiality and optimum decision making in selecting the most suitable applicant is explained
- A recognised selection technique that could be used during interviews is explained
- The importance of effective induction is explained
- The phases of induction in the organisation is described
- The legal and practical aspects of health and safety that should be included in the organisation's induction process is described
- One method that could be used to record an individual's progress during induction is explained
- How an induction process could be evaluated is explained

| M3.18 | Coaching and training your work team |
|---|---|

**Work-based Assignment**

This activity requires that you identify an opportunity to train and coach members of your team or other individuals in your workplace. You should:
- Describe the training and coaching need in your workplace
- Explain how you would use training and coaching to meet the need in your workplace and cater for individuals in your workplace with different learning styles
- Explain how you would use feedback to improve workplace performance in relation to this training and coaching need
- Explain how you would evaluate the effectiveness of the training and coaching techniques you have identified
- Explain how you would maintain records of the training and coaching that team members have undertaken

**Assessment Criteria**

- The training need is clarified
- The two training techniques appropriate to the workplace situation is explained
- How you could cater for different learning styles when training individuals in the workplace is explained
- One relevant feedback technique that could work effectively in the workplace situation is explained
- Methods of evaluating the effectiveness of training is described
- Ways of maintaining training records is explained
- The coaching need is clarified
- Planning coaching for an individual in the organisation is explained
- The importance of feedback in coaching is explained
- One method of evaluating the effectiveness of coaching is described

| M3.19 | Providing quality to customers |
|-------|-------------------------------|

**Reflective Review**

Briefly describe the quality system used by your organisation. Using this quality system to illustrate your answers,
where appropriate, you should:
- Explain why quality is so important to both internal and external customers in your workplace
- Explain what is meant by Total Quality Management
- Explain the difference between design quality standards and process quality standards
- Briefly describe the quality system used by the organisation
- Identify <u>two</u> quality standards set for your organisation and <u>one</u> example of the cost of quality

Briefly describe the tools that you use to monitor quality in your workplace and the way that quality maintenance is
 recorded

Identify two practical steps you could take to improve quality in your workplace

**Assessment Criteria**

- The reason that quality is important to internal and external customers in the organisation is explained
- Total Quality Management is explained
- The difference between design quality standards and process quality standards is explained
- One example of the cost of quality in the workplace is identified
- The quality system used by the organisation is briefly described
- Two quality standards set for the organisation are identified
- The tools used to monitor quality in the workplace are briefly described
- The records for maintaining quality in the workplace are briefly described
- Two practical and positive steps to improve quality to meet customer requirement in the workplace is identified

| M3.20 | Planning to work efficiently |
|-------|------------------------------|

**Reflective Review**

This activity is concerned with the way that you plan work for your team. You should:
- Identify the targets set for your team, including the indicators that will be used to measure these targets
- Identify which, if any, of these targets is related to efficiency and/or effectiveness
- Use <u>one</u> planning technique to plan a job activity in your workplace and explain how you would monitor the planned job activity
- Explain why the supply chain is so important in delivering results and meeting your customers' requirements

**Assessment Criteria**

- The targets set for the team are identified and the performance measurement indicators stated
- One appropriate planning technique to plan a job activity is used
- One technique to monitor and control a planned job activity is explained
- The importance of the supply chain in delivering results and meeting customer requirements is explained
- The importance of effectiveness and efficiency to achieve workplace objectives is explained
- How efficiency and effectiveness are measured in your organisation is explained

| M3.21 | Organising and delegating |
|---|---|

**Reflective Review**

Review how you plan and delegate tasks to your team and:
- Explain why it is so important to make effective and efficient use of your team's knowledge and skills while planning to achieve work objectives
- Explain <u>one</u> technique you use to schedule and allocate work to your team and individuals
- Explain how human resource planning can be used to assure output and quality

Identify <u>one</u> occasion when you have delegated responsibility to, and <u>one</u> occasion when you have attempted to empower, a member of your team (or opportunities for delegation and empowerment that may occur at some point in the future):
- Briefly discuss each of these examples of delegation and empowerment in your workplace
- Identify and describe <u>one</u> barrier to delegation in your workplace and <u>one</u> mechanism to support delegation in your workplace
- Explain <u>one</u> technique that you use (or could use) to monitor the outcomes of delegation in your workplace
- Review the effectiveness of feedback, recognition and reward techniques in your workplace

**Assessment Criteria**

- The importance of making effective and efficient use of people's knowledge and skills while planning the team's work to achieve objectives is explained
- One technique is used to identify the appropriate person for an activity
- How human resource planning can be used to assure output and quality is explained
- One example of delegation and one example of empowerment in the workplace is given
- One barrier to delegation and one mechanism to support delegation is identified
- One technique that could be used to monitor the outcomes of delegation in the workplace is explained
- The effectiveness of feedback, recognition and reward techniques in the workplace is reviewed

| M3.22 | Managing projects |
|---|---|

**Work-based Assignment**

Identify and describe a simple project you could undertake that should lead to savings in the workplace and, having done this, you should:
- Plan the project using <u>one</u> appropriate project planning technique
- Identify <u>one</u> simple tool that could be used to determine the financial viability of the project
- Set targets to monitor your performance
- Explain <u>one</u> technique you would use to evaluate your project
- List those areas where savings in the workplace would be achieved as a result of your project
- Identify the wider non financial implications that could arise as a result of your project

**Assessment Criteria**

- A simple workplace project is identified
- One simple tool for determining the financial viability of the project is used
- The project is planned using one appropriate project planning technique
- Objectives and targets/milestones to monitor performance and review plans are set
- One project evaluation technique is used
- Areas where net savings could be achieved as a result of the workplace project is listed
- Wider non financial implications that could result from the workplace project are identified

| M3.23 | Managing health and safety |
|---|---|

**Reflective Review**

Carry out a review of your role and responsibilities in relation to health, safety, welfare and environment protection at work. You should:
- Identify two pieces of legislation relating to health, safety, welfare and environmental protection relevant to your workplace
- Explain two duties the law imposes on you, as a manager, and on your team
- Outline your responsibility as a manager contained in your organisation's Health and Safety Policy or Environmental Protection Policy
- Explain what is meant by "a competent person" in your workplace in the context of health and safety
- Identify two ways you can provide health and safety or environmental protection information, instruction and training to your team
- Identify the expertise available in your organisation to help and advise you regarding issues of health and safety and environmental protection

Conduct a simple risk assessment in your workplace and explain one practical accident prevention and control measure that could be implemented

**Assessment Criteria**

- Two pieces of legislation relating to health, safety and welfare at work are identified
- Two duties statute law imposes on both the manager and the team is explained
- The manager's responsibilities contained within the organisation's Health and Safety Policy are outlined
- The meaning of "a competent person" is explained
- Two ways to provide Health and Safety information, instruction and training to the team are identified
- Expertise available in the organisation to help and advise the manager on health and safety issues is identified
- A simple risk assessment is conducted in the workplace
- One practical accident prevention and control measure that could be implemented in the workplace is explained
- The importance of environmental responsibility for your organisation is explained

| M3.24 | Understanding organisations in context |
|---|---|

**Reflective Review**

Provide a short profile of your organisation and its stakeholders, explain your own role within it, and compare it to managers at other levels within the organisation.

*Note: To complete the profile effectively you should identify the organisation's legal entity, its principal stakeholders and their relevance to the organisation and list the organisation's operational functions, and use an organisation chart to identify and explain your own role, span of control and reporting lines in relation to other managers*

- Identify the main financial documents used by your organisation and briefly describe their importance and the information they contain

Give examples of long-, medium- and short-term funds used by (or which could be used by) the organisation and identify a performance indicator that is relevant to each of these

Identify the major economic and political forces that currently have an impact upon the organisation (either positive or
negative). Describe any actions that a government could take which would have an effect on these.

*Note: In identifying the economic and political impacting on the organisation you should make some reference to the effects of international organisations, globalisation and exchange rates (explaining why they do NOT affect your organisation, if that is the case)*

**Assessment Criteria**

- The legal entity of the organisation is identified
- The operational functions within the organisation is listed
- An organisational chart is used to identify own role, span of control and reporting line in the organisation
- The roles and responsibilities of managers at different levels of the organisation is briefly outline
- The relevance to an organisation of its different stakeholders if briefly explained
- Important financial information for management is explained
- The main financial documents needed by the organisation are identified and the information they contain are briefly described
- The most significant financial indicators of business performance in the organisation are identified and their relevance is briefly described
- The main sources of long, medium and short term funds for the organisation are listed
- The major economic and political forces which impact upon the organisation are identified
- How government attempts to influence the economy and its effect on the organisation's operations is briefly described

| M3.25 | Understanding culture and ethics in organisations |
|-------|---------------------------------------------------|

**Reflective Review**

Carry out a 'values and culture' assessment of the organisation, identifying and describing the culture of the organisation and their commitment to social responsibility and sustainability

*Note: Your answer should explain what is meant by culture and values and describe the dominant culture and values within the organisation. You should also explain how they influence the management style and team structure, and extent to which they encourage or discourage 'internal politics'. Finally, you should* sider *how well the organisation demonstrates a sense of social responsibility, giving an example of any one way that it does this, or could do it*

Review your own role in promoting the organisation's values, culture, social responsibility and sustainability, and how you would respond to any problems that may occur. In your answer you should:
- Describe how you communicate the organisation's values to your team
- Explain what you would do if <u>two</u> of your team members had differing perceptions, values or cultures that adversely effected the workplace (or what you have done, if this has occurred)
- Explain how to approach problems in the workplace without creating a "blame culture"
- Explain what you would do if a team member's personal values clashed with that of the organisation's (or what you have done, if this has occurred)
- Explain how you would advise a team member who felt that the organisation had not responded to reports of malpractice at work, including the person's rights under Public Interest Disclosure legislation

**Assessment Criteria**

- The dominant culture with the organisation is describe and how this influences the management style and team structure is explained
- Own responsibility to promote the organisation's vision and help shape the culture is recognised
- How to approach problems in the workplace without creating a "blame culture" is explained
- How internal politics could arise within the organisation and its possible effects is briefly explained
- Values within the context of the organisation are defined
- How to communicate the organisation's values to the team is described
- How a first line manager could approach a problem between individuals who have different perceptions, values or cultures is explained
- How a first line manager could approach a problem where an individual's personal values clash with

that of the organisation is explained
- One of the organisation's corporate social responsibilities is described
- The rights given to people at work by the Public Interest Disclosure legislation to "blow the whistle" on perceived malpractice is briefly explained
- The importance of social responsibility and sustainability is explained
- What action the first line manager could take to enable the organisation to fulfil its social responsibility is described

| M3.26 | Managing performance |
|---|---|

**Reflective Review**

Explain your role in performance management in your workplace. In your answer you should:
- Briefly explain your role in performance management
- Give an example of a SMART objective and a performance standard you have agreed for your team
- Explain how you would measure performance against this standard
- Select an example of underperformance that has occurred in your workplace (or could potentially occur) and explain a performance improvement technique that you used (or could use) to address this variance

**Assessment Criteria**

- The role of the first line manager in performance management is briefly explained
- SMART objectives are set for the team
- Performance standards are set for the team
- How you would measure performance against agreed standards is explained
- An example of underperformance in the workplace is selected and a performance improvement technique available to address this underperformance explained

| M3.27 | Working with costs and budgets |
|---|---|

**Reflective Review**

Explain how budgetary and cost control helps you (or could help you if you do not yet have budgetary responsibility) to manage your team more effectively. In your answer you should:
- Explain the importance of agreeing to a budget and operating within it
- Describe how you (could) monitor variance between actual performance and budget
- Explain how you (could) gather information to be used in determining and/or revising budgets
- Explain the concepts of fixed and variable costs and break even
- Explain how basic cost statements and standard costs are used (or could be used) in your workplace, explaining their purpose and nature and how they are (or could be) used to control costs

**Assessment Criteria**

- The importance of agreeing to a budget and operating within it are explained
- A method to monitor variance between actual performance and budget is described
- How information is gathered and used in determining and/or revising budgets is explained
- Fixed and variable costs and the concept of break even in relation to the organization is explained
- The purpose and nature of basic cost statements is explained
- The value of standard costing and its role as a control mechanism is explained
- The mechanisms in the organisation to maintain control of costs are briefly explained

| M3.28 | Managing the efficient use of materials |
|---|---|

**Reflective Review**

Describe how stock requirements are determined in your workplace and how stocks of supplies are recorded, received and issued. Identify organisational stores/stock control principles and procedures and their role in ensuring that quality standards are met. Explain <u>two</u> consequences of not maintaining optimum stocks.

Outline how waste is measured and monitored in the organisation. Identify <u>two</u> areas where it may be possible to reduce waste in the workplace and put together a simple action plan to do this.

**Assessment Criteria**

- How to determine stock requirements in the workplace is described
- Two consequences of not maintaining optimum stocks in the workplace is explained
- Organisational stores/stock control principles and procedures are identified
- The organisation's procedures for recording, receipt and issue of supplies is outlined
- Why quality standards need to be maintained in the organisation is briefly described
- Potential waste in the organisation is identified
- The techniques and/or methods for measuring and monitoring waste in the organisation is outlined
- A simple action plan to minimise waste in the workplace is compiled

| M3.29 | Managing the effective use of equipment |
|---|---|

**Reflective Review**

Review the way that equipment is used, monitored, maintained and secured. In your answer you should:
- Conduct a simple risk assessment of equipment security in the workplace and explain how these risks could be reduced
- Explain <u>why</u> equipment should be used effectively and efficiently and <u>why</u> it is important to have a scheduled maintenance programme for equipment in the workplace
- Describe how the use of equipment is monitored and controlled in the workplace and compile a simple maintenance programme for equipment in the workplace

**Assessment Criteria**

- Why equipment should be used effectively and efficiently is explained
- How the use of equipment is monitored and controlled in the workplace is described
- Why it is important to have a scheduled maintenance programme for equipment in the workplace is explained
- A simple maintenance programme for equipment in the workplace is compiled
- A simple risk assessment of equipment security in the workplace is conducted and how these risks could be used is explained

| M3.30 | Understanding the communication process in the workplace |
|---|---|

**Reflective Review**

Identify two specific communication needs that you have at work and plan how you can best meet these needs, using one oral (i.e. spoken) and one written means of communication. In your answer you should:
- Explain your two chosen communication activities with reference to the stages in the communication process and give at least one advantage and one disadvantage of your two chosen ways of communicating your message

You should identify potential barriers to communication that might occur and show how you will overcome them. In your answer you should:
- Identify <u>two</u> possible barriers to communication in your workplace, in relation to either of the two communication activities, and describe how each barrier could be overcome
- In your chosen oral communication, you should describe how you would take account of the influence of non-verbal communication on the receiver

Identify ways that you can increase your awareness of information in the workplace and improve your attention and concentration span

Explain how you will use feedback to check the effectiveness of your communication.

**Assessment Criteria**

- The stages in the communication process are outlined
- Two possible barriers to communication in the workplace are identified and how each barrier could be overcome described
- Two different types of communication that could ensure effective communication in the workplace is named and an advantage and a disadvantage identified of each
- How non-verbal communications can influence the receiver is explained
- How to used feedback to check the effectiveness of communication is briefly explained
- How you could increase information awareness in your workplace is explained

| M3.31 | Influencing others at work |
|---|---|

**Reflective Review**

Identify a network that you are part of (or that you could be part of) and explain what its value is (or would be) to you and what you (could) do to establish and maintain your relationship with the network.

Identify a situation in the workplace where you have wanted to persuade someone to accept your point of view on a topic. Review how effective you were, with reference to the general principles of negotiation. Describe what you did to reduce resistance and minimise conflict in order to achieve a win-win situation.

Review your effectiveness in influencing people in your team to achieve workplace objectives

**Assessment Criteria**

- The value to the first line manager of networking is explained
- An appropriate network for a first line manager is identified and methods described to establish and maintain effective professional relationships with the identified network
- The general principles of negotiation are explained
- A relevant technique for influencing others to achieve workplace objectives is explained
- How to reduce resistance and minimise conflict to achieve a win-win situation in the workplace during negotiations is described

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| M3.32 | Communicating one-to-one at work |
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**Reflective Review**

Identify a situation where you have specifically chosen to use one-to-one communication.
- Identify any other methods of direct communication that were open to you to use and explain why it was important for you to use one-to-one communication.
- Identify some of the non-verbal behaviours that either of you used which were significant in the communication process

Identify a situation in the workplace where an interview is required. You should then
- Prepare for and plan the interview
- Explain how you would conduct interviews effectively, ethically and within the law
- Describe what record keeping is required for the type of interview you will conduct
- Explain how you would provide feedback to the interviewee after the interview where appropriate

**Assessment Criteria**

- A range of non-verbal behaviours which can affect people in the workplace is identified
- The importance of one-to-one communication is explained
- Two methods of direct communication used in the workplace is listed
- The importance of succinct and accurate records of one-to-one oral communication is explained
- How you could prepare for and plan an interview for a specific situation in your organisation is explained
- How you could conduct interviews effectively, lawfully and ethically is explained
- How you would evaluate that the interview had been conducted effectively, lawfully and ethically is explained
- What record keeping is required for the type of interview is decided
- How you would provide feedback to the interviewee where appropriate is explained

| M3.33 | Effective meetings for managers |
|-------|----------------------------------|

**Work-based Assignment**

Describe how you would prepare prior to a meeting
Explain the following:
- The purpose of an agenda
- The role and responsibilities of the chairperson, secretary and individuals
- Basic meeting protocol and procedures
- The purpose of minutes and action plans
- How you could review your own effectiveness at meetings

**Assessment Criteria**

- The purpose of an agenda is explained
- How to prepare prior to a meeting is described
- The role and responsibilities of the chairperson, the secretary and individuals at a meeting is explained
- Basic meeting protocol and procedures are explained
- The purposed of minutes and action plans are explained
- Own effectiveness at meetings is reviewed

| M3.34 | Understanding workplace information systems |
|-------|---------------------------------------------|

**Reflective Review**

**Purposes of record keeping**
Explain the purposes of record-keeping for your organisation
**Key information**
- Identify key information that should be recorded to meet your organisation's requirements and legal requirements
- Identify records which are included under relevant legislation (for example the Data Protection Act of 1998)

**Storage and retrieval of information**
Identify appropriate systems to store and retrieve information in your organisation
**Data Access Control**
Explain the need to control access to data
**Electronic communication**
- Identify the different uses or applications of spreadsheets and/or databases in your organisation
- Explain the value of electronic communication methods
- Explain the back-up systems for IT applications in your organisation

**Assessment Criteria**

- The purposes of record-keeping for the organisation are explained
- Key information that should be recorded to meet organisational and legal requirements is identified
- Appropriate systems to store and retrieve information is identified
- The need to control data access is explained
- Records which are included under relevant legislation (for example the Data Protection Act of 1998) are identified
- The different uses or applications of spreadsheets and/or databases in the organisation are identified
- The value of electronic communication methods is explained
- The back-up system for IT applications in the organisation is explained

| M3.35 | Marketing for Managers |
|-------|------------------------|

**Work-based Assignment**

Marketing concepts – You should:
- Explain why the marketing concept is relevant for managers
- Explain your organisation's strengths, weaknesses, opportunities and threats in the marketing context
- Describe how each of the <u>four</u> elements of the marketing mix is used within the context of your organisation

**Assessment Criteria**

- The relevance of the marketing concept for managers is explained
- The strengths, weaknesses, opportunities and threats in the marketing context is explained
- An example of how each of the <u>four</u> elements of the marketing mix is used within the organisation is described