Institute of Leadership & Management

ILM Level 3 Certificate in Using Active Operations Management in the Workplace (QCF)

CONTENTS

Qualification Overview: ILM Level 5 Award, Certificate and Diploma in Management

APPENDICES

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

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SECTION B: QUALIFICATION SPECIFIC INFORMATION

QUALIFICATION(S) OVERVIEW:

ILM Level 3 Certificate in Using Active Operations Management in the Workplace	
Purpose of the qualification	The Certificate enables learners to understand the principles, methodology and practice of active operations management in leading service operations teams. It provides for a highly structured and disciplined approach to front line capacity planning and control for first line and middle managers allowing them to understand workloads and balance these with resource availability using software tools leveraging management and leadership capability. Active operations management methodology enables learners to apply the management practices across a range of service operations environments such as banking, insurance, outsourcing, call centres and customer services, operations and the public sector making significant improvements to the efficiency and effectiveness of delivery.
Progression routes	ILM Level 3 Certificate in First Line Management (QCF) (500/3585/X) ILM Level 3 Diploma in Facilities Management (QCF) (500/5495/8) ILM Level 3 Award in Workplace Coaching for Team Leaders and First Line Managers (QCF) (500/3563/0) ILM Level 3 Certificate for Professional Workplace Coaches (QCF) (500/3565/4) ILM Level 4 Diploma in Management (QCF) (500/5677/3) ILM Level 5 Certificate in Service Improvement (QCF) (500/7552/4) ILM Level 5 Certificate in Management (QCF) (500/3879/5) ILM Level 5 Certificate in Coaching and Mentoring in Management (QCF) (500/3564/2)

Credit Value	15 minimum
Induction	1 Hour
Tutorial Support	At least 1 hour
Guided Learning Hours	Minimum 78 hours
To be completed within	3 Years

	Group A Units	Credit Value
Structure	M3.56 Principles and practise of active operations management	2
	M3.58 The language of active operations management	1

	M3.59 Organising for effective operations management	1
	Group B Units	**Credit Value**
	M3.60 Capacity planning in service operations	3
	M3.61 Operations control in service operations	2
	M3.62 Variance analysis and collective Learning in service operations	3
	M3.63 Managing individual performance using active operations management	2
	M3.09 Giving briefings and making presentations in the workplace	1
Assessment	- Coursework - Multiple Choice - Written Short Answer - E-assessment - E - Portfolio of Evidence - Practical Demonstration / Assignment - Professional discussion /Presentation	

QUALIFICATION(S) OVERVIEW:

The ILM Level 3 Certificate in Using Active Operations Management in the Workplace is a free-standing qualification which links to the 2008 National Occupational Standards for Leadership and Management

This Qualification Specification is provided by ILM as a base-line quality document to assure consistent standards of provision and assessment across Centres.

It must form the basis for all programmes leading to the qualifications to which it refers, and will be used by External Verifiers and Quality Managers to monitor activity.

This qualification was designed with an ILM approved centre that has created the active operations management Workware (software) and methodology to help establish a national benchmark for practice.
As such, the assessment uses the software, e-learning, online assessment and e-portfolio's and requires a higher pass mark than 50% for some of the units. The assessments and marking sheets in the qualification specification reflect this, as well as offering some alternate assessment approaches.

Centres wishing to deliver this qualification will need to work with their local Business Managers, Quality Managers and Quality Consultants to establish a signed off Scheme of Work and Lessons Plans before candidates undertake enrolment, learning, assessment and certification. The Workware may also be made available by the vendor - Active Operations Management International, (www.activeops.com) on application to them or Active Operations Management International could deliver the qualification for you as an ILM approved centre.

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UNIT SPECIFICATIONS

Title:	Principles and practise of active operations management (M3.56)
Level:	3
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1 Understand how active management operations contributes to the success of an organisation	1.1 State the purpose of active operations management 1.2 Describe how active management differs from reactive and bureaucratic management 1.3 State the business, management and staff benefits derived from implementing active operations management at your workplace 1.4 Identify the core components of an active operations management environment
2 Understand how to balance the three performance objectives of cost, quality and service	2.1 Explain how active operations management can help improve quality and service at the same time as managing costs at your workplace 2.2 Describe the reasons that cause businesses to experience fluctuations in productivity 2.3 Identify how the active operations management process can help stabilise productivity 2.4 Describe the advantages of stabilised productivity at your workplace
3 Understand the four factors that support the active management operations approach and are critical to its success	3.1 List the four factors critical to the success of active operations management 3.2 Describe the benefits of an active management style 3.3 Explain the main stages in the active operations management process 3.4 Identify the types of tools that can help you improve your operational performance

4	Understand the five foundation principles of active operations management that create the context for good practice	4.1	List the five foundation principles of active operations management
		4.2	Identify the activity that has the biggest impact on making the best use of available time
		4.3	State the main cause of 'lost time'
		4.4	Identify two ways for keeping your plans on target
		4.5	Explain why it is important to exceed customer expectations

Additional information about the unit	
Unit purpose and aim(s)	To identify key terms and concepts within active operations management and provide a high-level overview of the benefits to individuals and organisations that implement active operations management
Unit review date	28/2/2015
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	None
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	None
Support for the unit from a sector skills council or other appropriate body (if required)	MSC
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	01/03/2010
Units available from	01/03/2010
Unit guided learning hours	7

Additional Guidance about the Unit	
Indicative Content:	
1	• Effective use of resources by active operations management • Production targets and service level agreements • Benefits of implementing active operations management • Resource planning and communication of resource planning
2	• Cost, quality and service standards • Options for improving quality • Costs of quality • Balancing quality and cost • Balancing service and cost • Relationship between productivity and workload • Creating a 'virtuous circle' of improving performance • Causes of fluctuating productivity • Stabilising productivity to 'smooth out' fluctuations in productivity and increase capacity
3	• Management behaviour in active operations management • Operations management skills in active operations management • The management process in active operations management • Management tools to support the active management operations process
4	• Five foundation principles of active operations management • 'lost' time • Planning ahead and managing plans • The effects of management behaviour on team performance • Proactive management to prevent problems arising • The role of customer expectations
Assessment Available:	
• AOMI e-Academy or ILM	
Resources Available:	
• AOMI e-academy, AOMI workbooks	

Title:	The language of active operations management (M3.58)
Level:	3
Credit value:	1

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1. Understand ideas and concepts behind operations control methodology	1.1 Explain double loop learning and why it is important 1.2 Provide two examples of 'in-period' control 1.3 Provide two examples of the three critical comparisons necessary for control
2. Understand the two dimensions of processes and time horizons	2.1 Identify the two dimensions of the active management system 2.2 State the purpose of each of the four main processes in the active operations management cycle 2.3 Explain how processes and time horizons combine to give a single flowchart of management activities 2.4 Identify the three principal feedback loops within the active operations management process diagram 2.5 Explain why all active operations management activities cannot be implemented at the same time
3. Understand key terms in active operations management and the concept of standard time to measure work	3.1 State the differences between core tasks, diverted tasks and downtime 3.2 Explain what is meant by the Standard Time 3.3 State three of the common misconceptions of Standard Time
4. Understand how productivity and utilisation are used to compare performance and to measure how staff time is used	4.1 Explain what is meant by the term 'productivity', and how it is used in a planning context 4.2 Identify three possible causes of a reduction in productivity 4.3 Explain what is meant by 'utilisation' and explain the importance of utilisation in team development
5. Understand how active operations management principles can be put into practise to maintain operational	5.1 Demonstrate how to arrive at accurate Standard Times for core tasks

| control | 5.2 | Explain the principle of 'in-period control' |
| | 5.3 | State the three critical comparisons necessary for control |

Additional information about the unit	
Unit purpose and aim(s)	To introduce the principles of control and underlying concepts behind the active operations management methodology and the active operations management process of forecasting, planning, controlling and reviewing
Unit review date	28/2/2015
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	None
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	None
Support for the unit from a sector skills council or other appropriate body (if required)	MSC
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	01/03/2010
Units available from	01/03/2010
Unit guided learning hours	7

Additional Guidance about the Unit	
Indicative Content:	
1	• Single and double feedback loops • Critical comparisons for operational control • In-period control
2	• The processes-time dimensions of active operations management • Forecasting, planning, controlling and reviewing in the active operations management cycle • Time horizons for active operations management • Daily and weekly work planning and control • Reviewing performance • Forecasting and long-range planning • The active operations management process feedback • Active operations management implementation phases
3	• Core tasks, diverted tasks and downtime in active operations management • Defining work and time – standard time
4	• The relationship between productivity and utilisation • The relationship between production and productivity • Productivity and the planning process • Interpreting changes in productivity • Interpreting changes in utilisation
5	• Feedback loops and standard time • Estimating standard time • In-period control and now-required planning • Critical comparisons and reports
Assessment Available:	
• AOMI e-Academy or ILM	
Resources Available:	
• AOMI e-academy, AOMI workbooks	

Title:	Organising for effective operations management (M3.59)
Level:	3
Credit value:	1

Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1. Organise the primary work of the team into easy-to-understand clusters of activity	1.1	Describe the basic approaches to clustering activities
	1.2	Explain why the number of core tasks should limited to between 6 and 12
	1.3	Explain what work is contained within each of their team's tasks
	1.4	Explain why certain activities have been clustered together
2. Maintain an accurate count of work received, cleared, and outstanding	2.1	Describe how the work in the team is counted
	2.2	Enter the work into an operations management software package accurately and on time
	2.3	Describe at least one method of confirming the accuracy of the total work count
3. Propose materially accurate time standards to support capacity planning	3.1	Explain the importance of engaging staff in the establishment of time standards
	3.2	Explain how to use operations management software and organisation documentation to confirm the accuracy of time standards
4. Physically or logically organise work within the organisation's work-flow system in order to ensure work is processed effectively	4.1	
	4.2	Explain how to ensure that work is processed in a logical sequence
		Describe how to organise the work to keep the customer 'in sight and in mind'
5. Maintain accurate records of time spent on diverted activity	5.1	List the operation's standard set of diverted tasks and define each one
	5.2	Describe how data on 'diverted time' is captured

	5.3	Describe at least one method of confirming the accuracy of the recorded diverted time
6. Maintain accurate records of how staff time is distributed	6.1	List the operation's standard set of time categories and define each one
	6.2	Describe how data on 'time spent' is captured
	6.3	Describe at least one method of confirming the accuracy of the recorded time spent

Additional information about the unit	
Unit purpose and aim(s)	To understand how to use capacity planning software to cluster work, maintain accurate work counts, and time standards and process work effectively
Unit review date	28/2/2015
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2008 NOS: D1, D5
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	None
Support for the unit from a sector skills council or other appropriate body (if required)	MSC
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	01/03/2010
Units available from	01/03/2010
Unit guided learning hours	6

Additional Guidance about the Unit	

Indicative Content:	
1	• Capacity planning software and core tasks • Approaches used in clustering activities
2	• Accurate counting of work, including work received, work cleared, and work outstanding • Using capacity planning software to maintain an accurate account of work
3	• Engaging staff in establishing time standards • Using capacity planning software and organisational records to confirm time standards
4	• Organising work within a work-flow system • Effective processing of work • Sequencing of work • Organising work and customer requirements
5	• Diverted tasks and diverted times • Recording diverted tasks and diverted time accurately
6	• Time categories • Recording time

Assessment Available:
• AOMI e-Academy or ILM

Resources Available:
• AOMI e-academy, AOMI workbooks

Title:	**Capacity planning in service operations (M3.60)**

Level:	3
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)	
1. Understand the role of the Team Leader in the active operations management planning process	1.1	Describe the role of team leader in the active operations management planning process
2. Gather and organise the necessary information to prepare a forecast	2.1	Identify appropriate sources of forecast information for both work planning and resource planning
	2.2	Organise the identified forecast information into the appropriate format for entry into the capacity planning software
3. Use capacity planning software to produce a capacity plan	3.1	Produce a realistic capacity plan by identifying and entering the data required based on your organisational requirements
	3.2	Use appropriate naming conventions
4. Develop and produce a capacity plan based on identified forecast information and operational policy	4.1	Define the necessary production targets based on forecasted incoming work and policies around work in progress and service levels
	4.2	Establish diverted activities in line with operational policy
	4.3	Calculate levels of staff absence
	4.4	Produce a capacity plan to organisation's standards on time that can be aggregated for joint planning meetings
5. Work with colleagues to solve capacity management problems	5.1	Explain and justify own capacity plan at joint planning meeting
	5.2	Offer constructive comments on others' plans
6. Set priorities and prepare a fully-balanced capacity plan	6.1	Select and justify the correct options and apply them to produce a fully-balanced capacity plan
Additional information about the unit		
Unit purpose and aim(s)	To understand how to use capacity planning software to produce a fully-balanced capacity plan after gathering and organising all necessary information and explaining and	

	justifying own capacity plan at a joint planning meeting
Unit review date	28/2/2015
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2008 NOS: B5, D1, D12, E10, E11
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	None
Support for the unit from a sector skills council or other appropriate body (if required)	MSC
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	01/03/2010
Units available from	01/03/2010
Unit guided learning hours	15

Additional Guidance about the Unit
Indicative Content:

1	• Why planning is important in active operations management • The main activities in the planning process and the role of the team leader in planning • The difference between a balanced capacity plan and an unbalanced capacity plan • The importance of balancing a capacity plan
2	• Sources of forecast information for work planning • Sources of information for resource planning • Naming conventions in capacity planning software
3	• Organisational requirements for capacity planning data • Using capacity planning software to create a new capacity plan *or* to open and modify an existing capacity plan • Using the history and summary functions of the capacity planning software appropriately
4	• Organisational policies on WIP • Organisational service levels • Diverted activities • Methods for estimating staff absence • Defining production targets within organisational constraints
5	• Consideration of the venue • Barriers to communication • Summarising • Promoting and handling questions • Checking understanding
6	• Using capacity planning software to identify balancing options • Producing a fully-balanced capacity plan using capacity planning software

Assessment Available:
• AOMI e-Academy or ILM

Resources Available:
• AOMI e-academy, AOMI workbooks

Title:	**Operations control in service operations (M3.61)**
Level:	3

Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1. Understand the principles of operational control in active operations management	1.1 Describe the elements of a double loop feedback system 1.2 Explain how 'in period control' and 'now required planning' support the management of the three key performance factors of cost, quality and service
2. Conduct a team briefing to communicate weekly planning priorities	2.1 Use a recognised active operations management software package to prepare for a weekly team planning briefing at own place of work 2.2 Define the briefing objectives and plan the structure and content of the team briefing 2.4 Prepare the supporting materials prior to the briefing 2.5 Conduct the team briefing including encouraging and handling questions during and after the team briefing 2.6 Explain how to check the team's understanding
3. Use active operations management software to produce and interpret a summary report and determine actions to ensure planned outcomes	3.1 Use active operations management software package to produce a summary report at own place of work 3.2 Demonstrate how the headline graphs and the summary report can be used to support the teams achievements of planned outcomes
4. Monitor in-day achievement against work plan and allocate work and resources to optimise daily outcomes	4.1 Demonstrate how to maintain daily data capture disciplines at own place of work 4.2 Demonstrate progress towards production targets 4.3 Demonstrate how work is planned or allocated to meet daily production targets
5. Take corrective action to re-plan and re-prioritise at critical points during the week	5.1 Demonstrate how plans are revised in the light of events occurring during the week at own place of work 5.2 Demonstrate how activities have been re-prioritised for the day based on revised plans 5.3 Provide examples of how new priorities have been communicated to the team 5.4 Provide examples of at least one way of checking that team members understand what work was required of them
Additional information about the unit	
Unit purpose and aim(s)	To understand how to use active operations management software to prepare for a weekly team planning briefing at own place of work and to monitor and take corrective action on a summary report that supports the key performance factors of cost, quality and service

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Unit review date	28/2/2015
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2008 NOS: B5, D1, D5, D11, E10, E11
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	None
Support for the unit from a sector skills council or other appropriate body (if required)	MSC
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	01/03/2010
Units available from	01/03/2010
Unit guided learning hours	12

Additional Guidance about the Unit	
Indicative Content:	
1	• Single- and double-loop feedback • 'In period control' and 'now required planning' • Managing cost, quality and service in operations management
2	• Consideration of the venue • Presentation skills • Visual aids • Barriers to communication • Summarising • Promoting and handling questions • Checking understanding
3	• Use and interpretation of a recognised active operations management software package • Methods of information gathering, and retrieval from information systems • How to identify information needs for a variety of purposes • Methods to monitor actual performance against targets and time-scales, and identify variances • Use of information to solve problems, make decisions, take corrective actions
4	• Use and interpretation of a recognised active operations management software package • Working according to organisation's objectives, policies, procedures, and priorities • Recording outputs and variances and corrective actions • Ways to ensure team members understand monitoring systems • Techniques for scheduling work
5	• Use and interpretation of a recognised active operations management software package • Taking remedial and corrective action • Effective methods of communication to give instructions and achieve performance standards • A range of direct communication methods relevant to the team and their relative advantages and disadvantages • Stages in the communication process • Consideration of the recipient's needs • Barriers to communication and how to overcome them • Techniques for scheduling work
Assessment Available:	
• AOMI e-Academy or ILM	
Resources Available:	
• AOMI e-academy, AOMI workbooks	

Title:	Variance analysis and collective learning in service operations (M3.62)
Level:	3
Credit value:	3

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1. Understand the key drivers of operational variance in service operations in your workplace	1.1 Explain what is meant by 'operational variance' in the context of service operations 1.2 Explain what is meant by 'controllable variances' and 'less controllable variances' in service operations 1.3 Explain what the effect would be in your workplace of receiving more or less work than planned 1.4 Explain what would be the effect in your workplace of having more or less time available than planned
2. Improving the effectiveness of planning and control by reviewing outcomes achieved	2.1 Review a summary report provided by an active operations management software to identify the significant variances of plan against actual and describe the possible causes of the variation. 2.2 Describe the additional investigation undertaken to verify the identified variances. 2.3 Analyse what could be done to eliminate or reduce the common causes of variance in your workplace 2.4 Prepare an action plan to reduce the levels of variance in your workplace
3. Contribute to the collective learning by explaining own team's variances to colleagues	3.1 Demonstrate how to annotate the relevant data fields of an active operations management software system in order to record the explanation of any increases or decreases in productivity 3.2 Contribute to a variance review meeting with colleagues by explaining the root causes of variances against a previous period plan and the actions to be taken to control the variance in future. 3.3 Evidence the successful reduction of the level of difference between the planned and actual values of one identified variance
Additional information about the unit	

Unit purpose and aim(s)	To understand the effects of operational variances on work and time and how to justify a plan prepared by active operations management software to reduce variances at a meeting with colleagues.
Unit review date	28/2/2015
Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2008 NOS: B6, D1, D6, D12, E10, E11
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	None
Support for the unit from a sector skills council or other appropriate body (if required)	MSC
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	01/03/2010
Units available from	01/03/2010
Unit guided learning hours	14

Additional Guidance about the Unit	
Indicative Content:	
1	• Use and interpretation of active operations management software package • Different types of variance in the context of service operations ***including*** operational, controllable and less controllable • The importance of planning and scheduling a workload within given time constraints
2	• Use and interpretation of active operations management software package • Possible causes of variance identified on a summary report • Investigating and identifying summary report variances • Elimination of report variances • Action planning to reduce variance levels
3	• Use of active operations management software package to comment and explain on changes in productivity levels • How to consult with others and prepare to contribute effectively to a meeting • How to organise a meeting (physical resources, agenda) • How to make an effective contribution to discussion/decision making during a meeting • Roles and responsibilities of the chairperson, the secretary and individuals at a meeting • Purposes of minutes and action plans • The importance action plans and follow-up procedures after a meeting
Assessment Available:	
• AOMI e-Academy or ILM	
Resources Available:	
• AOMI e-academy, AOMI workbooks	

Title:	**Managing individual performance using active operations management (M3.63)**
Level:	3
Credit value:	2

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1. Know the main factors influencing individual performance	1.1 Explain the three factors that influence individual performance 1.2 Explain the two dimensions of each factor
2. Understand what motivates people	2.1 Identify the factors that influence how people behave in your workplace 2.2 Describe one theory of motivation 2.3 Explain two motivation techniques you could use to improve your team's performance
3. Understand leadership styles	3.1 Describe one theory of leadership styles 3.2 Identify the factors that will influence the choice of leadership styles in the workplace
4. Understand how active operations management can improve individual performance	4.1 Demonstrate how individual performance can be measured against agreed standards using an active operations management software system 4.2 Use comparative data from active operations management software to help identify suitable performance management actions within the workplace 4.3 Identify the most appropriate management approach for team members based on an assessment of their levels of motivation and skills
Additional information about the unit	
Unit purpose and aim(s)	To understand how active operations management is used with theories of motivation and leadership to manage individual performance in the workplace
Unit review date	28/2/2015

Details of the relationship between the unit and relevant national occupational standards or professional standards or curricula (if appropriate)	Links to MSC 2008 NOS: B5, B6, D1, D8, D13
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	None
Support for the unit from a sector skills council or other appropriate body (if required)	MSC
Location of the unit within the subject/sector classification system	15.3
Name of the organisation submitting the unit	Institute of Leadership & Management
Availability for use	01/03/2010
Units available from	01/03/2010
Unit guided learning hours	9

Additional Guidance about the Unit	
Indicative Content:	
1	• The purpose and value of formal and informal performance assessment at work • Ways to ensure fair and objective assessment • Preparations necessary for effective, valid and reliable assessments • Overview of the factors that influence individual performance at work
2	• Overview of the factors that influence individual behaviour at work • Theories of motivation, including Maslow, Herzberg and Vroom, and their application to teams • and individuals • Range of techniques to motivate individuals and monitor performance
3	• Differences and similarities between leadership and management • Leadership models (such as trait, contingency, situational, distributive) and their significance • for task performance, culture and relationships • Identification, development and appropriate choice of personal leadership styles and • behaviours • The role of trust and respect in effective team leadership
4	• Using active operations management software to improve employee performance • Using active operations management software to measure performance against agreed • standards • Using active operations management software to identify suitable performance management • actions • Identifying areas of strength and of possible improvement • Training to improve performance • Action planning techniques
Assessment Available:	
• AOMI e-Academy or ILM	
Resources Available:	
• AOMI e-academy, AOMI workbooks	

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

Learning outcomes (the learner will)	Assessment criteria (the learner can)
1. Know how to conduct a briefing or presentation	1.1 Select appropriate information in line with the objectives of the briefing or presentation 1.2 Logically structure the content of the briefing or presentation 1.3 Introduce an appropriate management topic clearly 1.4 Use appropriate presentation techniques and aids to enhance understanding of the topic of briefing or presentation 1.5 Present information clearly 1.6 Display confidence in the subject matter 1.7 Keep to time 1.8 Use feedback to check understanding 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)	None
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	None
Support for the unit from a sector skills council or other appropriate body (if required)	Management Standards Centre (MSC)
Location of the unit within the subject/sector classification system	15.3

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

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

A P P E N D I X   B

Mandatory Unit Assessments

Please note

Units:
- *Principles and practise of active operations management (M3.56)*
- *The language of active operations management (M3.57)*

have been written generically but are intended for Active Operations Management International's online assessment within a Learning Management System as multiple choice and short answer questions to test the knowledge and understanding. They will be internally marked by the system and externally assessed and verified by ILM.

The assessments and mark sheets offered in this section are alternative Work Based Assignments to an online assessment for the above two units only.

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ALTERNATIVE WORK BASED ASSIGNMENT:

Principles and practise of active operations management (M3.56)

Centre Number	Centre Name
Candidate Registration No	Candidate Name

TASK

To identify key terms and concepts within active operations management and provide a high-level overview of the benefits to individuals and organisations that implement active operations management

Assessment methods for this unit could include presentation, examination, multiple choice, observation and portfolio, or a combination of these assessment methods, as appropriate.

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand how active management operations contributes to the success of an organisation *(min 13 marks required from 26 available)*	• The purpose of active operations management is stated • How active management differs from reactive and bureaucratic management is described • The business, management and staff benefits derived from implementing active operations management at your workplace are stated • Core components of an active operations management environment are identified
Understand how to balance the three performance objectives of cost, quality and service *(min 15 marks required from 30 available)*	• How active operations management can help improve quality and service at the same time as managing costs at your workplace is explained • The reasons that cause businesses to experience fluctuations in productivity are described • How the active operations management process can help stabilise productivity is identified • The advantages of stabilised productivity at your workplace are described
Understand the four factors that support the active management operations approach and are critical to its success	• The four factors critical to the success of active operations management are listed • The benefits of an active management style are described • The main stages in the active operations management process are explained

(min 12 marks required from 24 available)	• The types of tool that help you improve your operational performance are identified
Understand the five foundation principles of active operations management that create the context for attaining excellence *(min 10 marks required from 20 available)*	• The five foundation principles of active operations management are listed • The activity that has the biggest impact on making the best use of available time is identified • The main cause of 'lost time' is stated • Two ways for keeping your plans on target are identified • Why it is important to exceed customer expectations is explained
By submitting I confirm that this assessment is my own work	

MARK SHEET:

Principles and practise of active operations management (M3.56)

Centre Number	Centre Name			
Candidate Registration No	Candidate Named below confirms authenticity of submission NAME:			

Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand how active management operations contributes to the success of an organisation • The purpose of active operations management is stated • How active management differs from reactive and bureaucratic management is described • The business, management and staff benefits derived when active operations management is implemented at your workplace are stated • Core components of an active operations management environment are identified			/ 26 marks (min13)	
Understand how to balance the three performance objectives of cost, quality and service • How active operations management can help improve quality and service at the same time as managing costs at your workplace is explained • The reasons that cause businesses to experience fluctuations in productivity are described • How the active operations management process can help stabilise productivity is identified • The advantages of stabilised productivity at your workplace are described			/ 30 marks (min 15)	

Understand the four factors that support the active management operations approach and are critical to its success • The four factors critical to the success of active operations management are listed • The benefits of an active management style are described • The main stages in the active operations management process are explained • The types of tool that help you improve your operational performance are identified			/ 24 marks (min 12)	
Understand the five foundation principles of active operations management that create the context for attaining excellence • The five foundation principles of active operations management are listed • The activity that has the biggest impact on making the best use of available time is identified • The main cause of 'lost time' is stated • Two ways for keeping your plans on target are identified • Why it is important to exceed customer expectations is explained			/ 20 marks (min 10)	

(External) Assessor's Decision		Quality Assurance Use	
Total Marks	**Outcome** (circle as applicable)	**Total Marks**	**Outcome** (circle as applicable)
Total 65+ overall, AND minimum in each section	**PASS REFERAL**	Total 65+ overall, AND minimum in each section	**PASS REFERAL**
Section REFERAL if applicable:		Date of QA check:	
Name of Assessor		Name of QA	
Assessor Signature and date		QA Signature and date	

ALTERNATIVE WORK-BASED ASSIGNMENT:

The language of active operations management (M3.58)

Centre Number	Centre Name
Candidate Registration No	Candidate Name

TASK

To understand the principles of control and underlying concepts behind the active operations management methodology and the active operations management process of forecasting, planning, controlling and reviewing.

Assessment methods for this unit could include presentation, examination, multiple choice, observation and portfolio, or a combination of these assessment methods, as appropriate.

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand ideas and concepts behind operations control methodology *(min 10 marks required from 20 available)*	• Double loop learning is explained • Why double-loop learning is important is explained • Two examples of 'in-period control are provided • Two examples of the three critical comparisons necessary for control are provided
Understand the two dimensions of processes and time horizons *(min 15 marks required from 30 available)*	• The two dimensions of the active management system are identified • The purpose of each of the four main processes in the active operations management cycle is stated • How processes and time horizons combine to give a single flowchart of management activities is explained • The three principal feedback loops within the active operations management process diagram are identified • Why all active operations management activities cannot be implemented at the same time is explained

Understand key terms in active operations management and the concept of standard time to measure work *(min 8 marks required from 16 available)*	• The differences between core tasks, diverted tasks and downtime are stated • What is meant by the Standard Time is explained • Three of the common misconceptions of Standard Time are stated
Understand how productivity and utilisation are used to compare performance and to measure how staff time is used *(min 10 marks required from 20 available)*	• What is meant by the term 'productivity' is explained • How 'productivity' is used in a planning context is explained • Three possible causes of a reduction in productivity are identified • What is meant by 'utilisation' is explained • The importance of 'utilisation' in team development is explained
Understand how active operations management principles can be put into practise to maintain operational control *(min 7 marks required from 14 available)*	• How to arrive at accurate Standard Times for core tasks is demonstrated • The principle of 'in-period control' is explained • The three critical comparisons necessary for control are stated
By submitting I confirm that this assessment is my own work	

MARK SHEET:

The language of active operations management (M3.58)

Centre Number	Centre Name			
Candidate Registration No	Candidate Named below confirms authenticity of submission NAME:			

Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand ideas and concepts behind operations control methodology • Double loop learning is explained • Why double-loop learning is important is explained • Two examples of 'in-period control are provided • Two examples of the three critical comparisons necessary for control are provided			/ 20 marks (min 10)	
Understand the two dimensions of processes and time horizons • The two dimensions of the active management system are identified • The purpose of each of the four main processes in the active operations management cycle is stated • How processes and time horizons combine to give a single flowchart of management activities is explained • The three principal feedback loops within the active operations management process diagram are identified • Why all active operations management activities cannot be implemented at the same time is explained			/ 30 marks (min 15)	

Understand key terms in active operations management and the concept of standard time to measure work • The differences between core tasks, diverted tasks and downtime are stated • What is meant by the Standard Time is explained • Three of the common misconceptions of Standard Time are stated			/ 16 marks (min 8)	
Understand how productivity and utilisation are used to compare performance and to measure how staff time is used • What is meant by the term 'productivity' is explained • How 'productivity' is used in a planning context is explained • Three possible causes of a reduction in productivity are identified • What is meant by 'utilisation' is explained • The importance of 'utilisation' in team development is explained			/ 20 marks (min 10)	
Understand how active operations management principles can be put into practise to maintain operational control • How to arrive at accurate Standard Times for core tasks is demonstrated • The principle of 'in-period control' is explained • The three critical comparisons necessary for control are stated			/ 14 marks (min 7)	

(External) Assessor's Decision		Quality Assurance Use	
Total Marks	**Outcome** (circle as applicable)	**Total Marks**	**Outcome** (circle as applicable)
Total 65+ overall, AND minimum in	**PASS REFERAL**	Total 65+ overall, AND minimum in each section	**PASS REFERAL**

each section			
Section REFERAL if applicable:		Date of QA check:	
Name of Assessor		Name of QA	
Assessor Signature and date		QA Signature and date	

WORK BASED ASSIGNMENT:

Organising for effective operations management (M3.59)

Centre Number	Centre Name
Candidate Registration No	Candidate Name

TASK
Use capacity planning software to cluster work, maintain accurate work counts and time standards and process work effectively at own place of work.

Assessment methods for this unit could include presentation, examination, multiple choice, observation and portfolio, or a combination of these assessment methods, as appropriate.

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Organise the primary work of the team into easy-to-understand clusters of activity *(min 9 marks required from 18 available)*	• The basic approaches to clustering activities are described • Why the number of core tasks should be limited to between 6 and 12 is explained • What work is contained within each of their team's tasks is explained • Why certain activities have been clustered together is explained
Maintain an accurate count of work received, cleared, and outstanding *(min 9 marks required from 18 available)*	• How the work in the team is counted is described • Work is entered into an operations management software package accurately and on time • At least one method of confirming the accuracy of the total work count is described
Propose materially accurate time standards to support capacity planning *(min 12 marks required from 24 available)*	• The importance of engaging staff in the establishment of time standards is explained • How to use operations management software and organisation documentation to confirm the accuracy of time standards is explained
Physically or logically organise work within the organisation's work-flow system in order to ensure work is processed effectively	• How to ensure that work is processed in a logical sequence is explained • How to organise the work to keep the customer 'in sight and in

(min 5 marks required from 10 available)	mind' is described
Maintain accurate records of time spent on diverted activity *(min 8 marks required from 16 available)*	• The operation's standard set of diverted tasks are listed and each one is defined • How data on 'diverted time' is captured is described • At least one method of confirming the accuracy of the recorded diverted time is described
Maintain accurate records of how staff time is distributed *(min 7 marks required from 14 available)*	• The operation's standard set of time categories are listed and each one is defined • How data on 'time spent' is captured is described • At least one method of confirming the accuracy of the recorded time spent is described
By submitting I confirm that this assessment is my own work	

MARK SHEET:

Organising for effective operations management (M3.59)

Centre Number	Centre Name
Candidate Registration No	Candidate Named below confirms authenticity of submission NAME:

Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Organise the primary work of the team into easy-to-understand clusters of activity • The basic approaches to clustering activities are described • Why the number of core tasks should be limited to between 6 and 12 is explained • What work is contained within each of their team's tasks is explained • Why certain activities have been clustered together is explained			/ 18 marks (min 9)	
Maintain an accurate count of work received, cleared, and outstanding (i.e. work in, work out, and Work in Progress) • How the work in the team is counted is described • Work is entered into an operations management software package accurately and on time • At least one method of confirming the accuracy of the total work count is described			/ 18 marks (min 9)	
Propose materially accurate time standards to support capacity planning • The importance of engaging staff in the establishment of time standards is explained • How to use operations management software and organisation documentation to confirm the accuracy of time standards is explained			/ 24 marks (min 12)	
Physically or logically organise work within the organisation's work-flow system in order to ensure work is processed effectively • How to ensure that work is processed in a logical sequence is explained • How to organise the work to keep the customer 'in sight and in mind' is described			/ 10 marks (min 5)	

Maintain accurate records of time spent on diverted activity • The operation's standard set of diverted tasks are listed and each one is defined • How data on 'diverted time' is captured is described • At least one method of confirming the accuracy of the recorded diverted time is described			/ 16 marks (min 8)
Maintain accurate records of how staff time is distributed • The operation's standard set of time categories are listed and each one is defined • How data on 'time spent' is captured is described • At least one method of confirming the accuracy of the recorded time spent is described			/ 14 marks (min 7)

(External) Assessor's Decision		Quality Assurance Use	
Total Marks	**Outcome** (circle as applicable)	**Total Marks**	**Outcome** (circle as applicable)
Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**	Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**
Section REFERAL if applicable:		Date of QA check:	
Name of Assessor		Name of QA	
Assessor Signature and date		QA Signature and date	

A P P E N D I X   C

Optional Unit Assessments

WORK BASED ASSIGNMENT:

Capacity planning in service operations (M3.60)

Centre Number	Centre Name
Candidate Registration No	Candidate Name

TASK

Use capacity planning software to produce a fully-balanced capacity plan at your workplace after gathering and organising all necessary information and explaining and justifying your capacity plan at a joint planning meeting.

Assessment methods for this unit could include presentation, examination, multiple choice, observation and portfolio, or a combination of these assessment methods, as appropriate.

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand the role of the Team Leader in the active operations management planning process *(min 5 marks required from 10 available)*	• The role of team leader in the active operations management planning process is described
Gather and organise the information necessary to prepare a forecast *(min 8 marks required from 16 available)*	• Appropriate sources of forecast information for both work planning and resource planning are identified • The identified forecast information is organised into the appropriate format for entry into the capacity planning software
Use capacity planning software to produce a capacity plan *(min 5 marks required from 10 available)*	• A realistic capacity plan is produced by identifying and entering the data required based on your organisational requirements • Appropriate naming conventions are used
Develop and produce a capacity plan based on identified forecast information and operational policy	• The necessary production targets based on forecasted incoming work *and* policies around work in progress and service levels are defined • Diverted activities in line with operational policy

(min 15 marks required from 30 available)	are established • Levels of staff absence are calculated • A capacity plan to organisation's standards on time that can be aggregated for joint planning meetings is produced
Work with colleagues to solve capacity management problems *(min 12 marks required from 24 available)*	• Own capacity plan is explained and justified at joint planning meeting • Constructive comments on others' plans are offered
Set priorities and prepare a fully-balanced capacity plan *(min 5 marks required from 10 available)*	• The correct options are selected, justified and applied to produce a fully-balanced capacity plan
By submitting I confirm that this assessment is my own work	

MARK SHEET:

Capacity planning in service operations (M3.60)

Centre Number	Centre Name			
Candidate Registration No	Candidate Named below confirms authenticity of submission NAME:			
Criteria	**Strengths**	**Areas for Improvement**	**Assr mark**	**QA mark**
Understand the role of the Team Leader in the active operations management planning process • The role of team leader in the active operations management planning process is described			/ 10 marks (min 5)	
Gather and organise the information necessary to prepare a forecast • Appropriate sources of forecast information for both work planning *and* resource planning are identified • The identified forecast information is organised into the appropriate format for entry into the capacity planning software			/ 16 marks (min 8)	
Use capacity planning software to produce a capacity plan • A <u>realistic</u> capacity plan is produced by identifying and entering the data required based on your organisational requirements • Appropriate naming conventions are used			/ 10 marks (min 5)	
Develop and produce a capacity plan based on identified forecast information and operational policy • The necessary production targets based on forecasted incoming work *and* policies around work in progress and service levels are defined • Diverted activities in line with operational policy are established • Levels of staff absence are calculated • A capacity plan to organisation's standards on time that can be aggregated for joint planning meetings is produced			/ 30 marks (min 15)	

Work with colleagues to solve capacity management problems • Own capacity plan is explained and justified at joint planning meeting • Constructive comments on others' plans are offered			/ 24 marks (min 12)	
Set priorities and prepare a fully-balanced capacity plan • The correct options are selected, justified and applied to produce a fully-balanced capacity plan			/ 10 marks (min 5)	

(External) Assessor's Decision		Quality Assurance Use	
Total Marks	**Outcome** (circle as applicable)	**Total Marks**	**Outcome** (circle as applicable)
Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**	Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**
Section REFERAL if applicable:		Date of QA check:	
Name of Assessor		Name of QA	
Assessor Signature and date		QA Signature and date	

WORK BASED ASSIGNMENT:

Operational control in service operations (M3.61)

Centre Number	Centre Name
Candidate Registration No	**Candidate Name**

TASK

Use active operations management software to prepare for a weekly team planning briefing at own place of work and to monitor and take corrective action on a summary report that supports the key performance factors of cost, quality and service

Assessment methods for this unit could include presentation, examination, multiple choice, observation and portfolio, or a combination of these assessment methods, as appropriate.

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand the principles of operational control in active operations management *(min 8 marks required from 16 available)*	• The elements of a double loop feedback system are described • How 'in period control' and 'now required planning' support the management of the three key performance factors of cost, quality and service is explained
Conduct a team briefing to communicate weekly planning priorities *(min 12 marks required from 24 available)*	• A recognised active operations management software package is used to prepare for a weekly team planning briefing at own place of work • The briefing objectives and plan the structure and content of the team briefing are defined • The supporting materials are prepared prior to the briefing • The team briefing is conducted, including encouraging and handling questions during and after the team briefing • How to check the team's understanding is explained
Use active operations management software to produce and	• Active operations

interpret a summary report and determine actions to ensure planned outcomes	management software package is used to produce a summary report at own place of work • How the headline graphs and the summary report can be used to support the teams achievements of planned outcomes is demonstrated
(min 8 marks required from 16 available)	
Monitor in-day achievement against work plan and allocate work and resources to optimise daily outcomes	• How to maintain daily data capture disciplines at own place of work is demonstrated • Progress towards production targets is demonstrated • How work is planned or allocated to meet daily production targets is demonstrated
(min 10 marks required from 20 available)	
Take corrective action to re-plan and re-prioritise at critical points during the week	• How plans are revised in the light of events occurring during the week at own place of work is demonstrated • How activities have been re-prioritised for the day based on revised plans is demonstrated • Examples of how new priorities have been communicated to the team are provided • Examples of at least one way of checking that team members understand what work was required of them are provided
(min 12 marks required from 24 available)	
By submitting I confirm that this assessment is my own work	

MARK SHEET:
Operational control in service operations (M3.61)

Centre Number	Centre Name			
Candidate Registration No	Candidate Named below confirms authenticity of submission NAME:			

Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand the principles of operational control in active operations management • The elements of a double loop feedback system are described • How 'in period control' and 'now required planning' support the management of the three key performance factors of cost, quality and service is explained			/ 16 marks (min 8)	
Conduct a team briefing to communicate weekly planning priorities • A recognised active operations management software package is used to prepare for a weekly team planning briefing at own place of work • The briefing objectives and plan the structure and content of the team briefing are defined • The supporting materials are prepared prior to the briefing • The team briefing is conducted, including encouraging and handling questions during and after the team briefing • How to check the team's understanding is explained			/ 24 marks (min 12)	
Use active operations management software to produce and interpret a summary report and determine actions to ensure planned outcomes • Active operations management software package is used to produce a summary report at own place of work • How the headline graphs and the summary report can be used to support the teams achievements of planned outcomes is demonstrated			/ 16 marks (min 8)	
Monitor in-day achievement against work plan and allocate work and resources to optimise daily outcomes • How to maintain daily data capture disciplines at own place of work is demonstrated				

• Progress towards production targets is demonstrated • How work is planned or allocated to meet daily production targets is demonstrated				/ 20 marks (min 10)
Take corrective action to re-plan and re-prioritise at critical points during the week • How plans are revised in the light of events occurring during the week at own place of work is demonstrated • How activities have been re-prioritised for the day based on revised plans is demonstrated • Examples of how new priorities have been communicated to the team are provided • Examples of at least <u>one</u> way of checking that team members understand what work was required of them are provided				/ 24 marks (min 12)

(External) Assessor's Decision		Quality Assurance Use	
Total Marks	**Outcome** (circle as applicable)	**Total Marks**	**Outcome** (circle as applicable)
Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**	Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**
Section REFERAL if applicable:		Date of QA check:	
Name of Assessor		Name of QA	
Assessor Signature and date		QA Signature and date	

WORK BASED ASSIGNMENT:

Variance analysis and collective learning in service operations (M3.62)

Centre Number	Centre Name
Candidate Registration No	Candidate Name

TASK

Explain the affects of operational variances on work and time and justify a plan prepared by active operations management software to reduce variances at a meeting with colleagues.

Assessment methods for this unit could include presentation, examination, multiple choice, observation and portfolio, or a combination of these assessment methods, as appropriate.

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Understand the key drivers of operational variance in service operations in your workplace *(min 10 marks required from 20 available)*	• 'Operational variance' in the context of service operations is explained • 'Controllable variances' and 'less controllable variances' in service operations is explained • The effect in your workplace of receiving more or less work than planned is explained • The effect in your workplace of having more or less time available than planned is explained
Improve the effectiveness of planning and control by reviewing outcomes achieved *(min 20 marks required from 40 available)*	• A summary report provided by an active operations management software is reviewed to identify the significant variances of plan against actual • The possible causes of the variation are described • The additional investigation undertaken to verify the identified variances is described • What could be done to eliminate or reduce the common causes of variance in your workplace is analysed • An action plan to reduce the levels of variance in your workplace is prepared

Contribute to collective learning by explaining own team's variances to colleagues	• How to annotate the relevant data fields of an active operations management software system in order to record the explanation of any increases or decreases in productivity is demonstrated
(min 20 marks required from 40 available)	• Contributions are made to a variance review meeting with colleagues by explaining the root causes of variances against a previous period plan and the actions to be taken to control the variance in future • The successful reduction of the level of difference between the planned and actual values of one identified variance is evidenced
By submitting I confirm that this assessment is my own work	

MARK SHEET:

Variance analysis and collective learning in service operations (M3.62)

Centre Number		Centre Name		
Candidate Registration No		Candidate Named below confirms authenticity of submission NAME:		

Criteria	Strengths	Areas for Improvement	Assr mark	QA mark
Understand the key drivers of operational variance in service operations • Operational variance' in the context of service operations is explained • 'Controllable variances' and 'less controllable variances' in service operations is explained • The effect in your workplace of receiving more or less work than planned is explained • The effect in your workplace of having more or less time available than planned is explained			/ 20 marks (min 10)	
Improve the effectiveness of planning and control by reviewing outcomes achieved • A summary report provided by an active operations management software is reviewed to identify the significant variances of plan against actual • The possible causes of the variation are described • The additional investigation undertaken to verify the identified variances is described • What could be done to eliminate or reduce the common causes of variance in your workplace is analysed • An action plan to reduce the levels of variance in your workplace is prepared			/ 40 marks (min 20)	
Contribute to collective learning by explaining own team's variances to colleagues • How to annotate the relevant data fields of an active operations management software system in order to record the explanation of any increases or decreases in productivity is demonstrated • Contributions are made to a variance review meeting with colleagues by explaining the root causes of variances against a previous period plan and the actions to be taken to control the variance in future				

			/ 40 marks (min 20)	
• The successful reduction of the level of difference between the planned and actual values of one identified variance is evidenced				

(External) Assessor's Decision		Quality Assurance Use	
Total Marks	**Outcome** (circle as applicable)	**Total Marks**	**Outcome** (circle as applicable)
Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**	Total 65+ overall, AND minimum in each section	**PASS**　　　**REFERAL**
Section REFERAL if applicable:		Date of QA check:	
Name of Assessor		Name of QA	
Assessor Signature and date		QA Signature and date	

WORK BASED ASSIGNMENT:

Managing individual performance using active operations management (M3.63)

Centre Number	Centre Name
Candidate Registration No	**Candidate Name**

TASK

Identify how individual performance in your workplace can be improved by understanding motivation and leadership and the use of active operations management to identify suitable performance management actions.

Assessment methods for this unit could include presentation, examination, multiple choice, observation and portfolio, or a combination of these assessment methods, as appropriate.

Please use the headings shown below when writing up your Assignment	**Assessment Criteria**
Know the main factors influencing individual performance *(min 10 marks required from 20 available)*	• The three factors that influence individual performance are explained • The two dimensions of each factor are explained
Understand what motivates people *(min 10 marks required from 20 available)*	• The factors that influence how people behave in your workplace are identified • One theory of motivation is described • Two motivation techniques you could use to improve your team's performance are explained
Understand leadership styles *(min 10 marks required from 20 available)*	• One theory of leadership styles is described • The factors that will influence the choice of leadership styles in the workplace are identified
Understand how active operations management can improve individual performance	• How individual performance can be measured against agreed standards using an active operations management software system is demonstrated • Comparative data from active operations

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	management software is used to help identify suitable performance management actions within the workplace
(min 20 marks required from 40 available)	• The most appropriate management approach for team members based on an assessment of their levels of motivation and skills is identified
By submitting I confirm that this assessment is my own work	

MARK SHEET:

Managing individual performance using active operations management (M3.63)

Centre Number		Centre Name			
Candidate Registration No		Candidate Named below confirms authenticity of submission NAME:			
Criteria	**Strengths**	**Areas for Improvement**		**Assr mark**	**QA mark**
Know the main factors influencing individual performance • The three factors that influence individual performance are explained • The two dimensions of each factor are explained				/ 20 marks (min 10)	
Understand what motivates people • The factors that influence how people behave in your workplace are identified • One theory of motivation is described • Two motivation techniques you could use to improve your team's performance are explained				/ 20 marks (min 10)	
Understand leadership styles • One theory of leadership styles is described • The factors that will influence the choice of leadership styles in the workplace are identified				/ 20 marks (min 10)	
Understand how active operations management can improve individual performance • How individual performance can be measured against agreed standards using an active operations management software system is demonstrated • Comparative data from active operations management software is used to help identify suitable performance management actions within the workplace • The most appropriate management approach for team members based on an assessment of their levels of motivation and skills is identified				/ 40 marks (min 20)	

(External) Assessor's Decision		Quality Assurance Use	
Total Marks	**Outcome** (circle as applicable)	**Total Marks**	**Outcome** (circle as applicable)
Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**	Total 65+ overall, AND minimum in each section	**PASS**　　　**REFERAL**
Section REFERAL if applicable:		Date of QA check:	
Name of Assessor		Name of QA	
Assessor Signature and date		QA Signature and date	

BRIEFING/PRESENTATION:

Giving Briefings/Making Presentations in the Workplace (M3.09)

Centre Number	Centre Name
Candidate Registration No	Candidate Name

TASK

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

BRIEFING/PRESENTATION MARK SHEET:

Giving Briefings/Making Presentations in the Workplace (M3.09)

Centre Number	Centre Name
Candidate Registration No	Candidate Named below confirms authenticity of submission NAME:

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

(External) Assessor's Decision		Quality Assurance Use	
Total Marks	**Outcome** (circle as applicable)	**Total Marks**	**Outcome** (circle as applicable)
Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**	Total 65+ overall, AND minimum in each section	**PASS** **REFERAL**
Section REFERAL if applicable:		Date of QA check:	
Name of Assessor		Name of QA	
Assessor Signature and date		QA Signature and date	

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