



Level 4 Diploma in Business Skills mapping toolkit



Guidance for training providers
July 2014 (v2.0)

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Introduction to AAT's Level 4 Diploma in Business Skills (QCF)

The Level 4 Diploma in Business Skills has been designed to provide staff with the key business skills to apply their technical accounting skills in the workplace.

Each unit specification, for this qualification, details the skills and knowledge the student needs to develop during their studies. Students will be required to demonstrate that they have met all the learning outcomes by collecting evidence in the form of a portfolio that confirms that have met the assessment criteria detailed in the specifications.

Qualification at a glance

| Qualification number: 601/0457/0 | | Level: 4 | | |
|----------------------------------|--|------------|------------|-------------------|
| Unit | Unit title | GLH | QCF credit | Assessment method |
| 1 | Working in teams | 62 | 7 | WPE/RPL* |
| 2 | Planning and delivering business communication activities | 55 | 6 | WPE/RPL* |
| 3 | Evaluate and improve own performance in a business environment | 14 | 4 | WPE/RPL* |
| 4 | Spreadsheet software (Level 3)** | 45 | 6 | WPE/RPL* |
| 5 | Presentation software (Level 3) | 45 | 6 | WPE/RPL* |
| 6 | Deliver a presentation (Level 3) | 15 | 3 | WPE/RPL* |
| 7 | Organising and facilitating meetings and workshops | 33 | 4 | WPE/RPL* |
| 8 | Developing commercial awareness | 37 | 4 | WPE/RPL* |
| 9 | Managing project finances | 50 | 10 | WPE/RPL* |
| | Total | 356 | 50 | |

Please note that students are required to complete all mandatory units (1-9).

*The method of assessment chosen for each unit is the gathering of Work Place Evidence (WPE) and Recognition of Prior Learning (RPL) in the form of a Portfolio. Training providers will be required to schedule the collection and assessment of WPE/RPL evidence through the AAT assessment platform.

**This unit forms part of the Level 3 Diploma in Accounting. Students who have already achieved this unit with AAT will have their achievement recognised when they register for the Level 4 Diploma in Business Skills.

Recognition of prior learning (RPL)

The RPL policy is available from AAT's Guidance document for training providers.

RPL is a method of assessment that may lead to the award of a unit within the AAT Accounting Qualification. It is known by a variety of titles including recognition of prior achievement and accreditation of prior learning.

The Regulatory Arrangements for the Qualifications and Credit Framework defines RPL as "a method of assessment [leading to the award of credit] that considers whether learners can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning".

The Scottish Credit and Qualifications Framework (SCQF) provide the following definition: "The Recognition of Prior Learning (RPL) is the process for recognising learning that has its source in experience and/or previous formal, non-formal and informal learning contexts. This includes knowledge and skills gained within school, college and university and outside formal learning situations such as through life and work experiences."

Training providers should make students aware of the possibility of presenting evidence for assessment by RPL. Such evidence may be derived from the following:

- Workplace activities (acceptable as the sole source of evidence for five units within the Accounting Qualification and as supplementary evidence to enhance other RPL evidence in other units).
- Formal training leading to the award of a certificate.
- Voluntary activities.
- Informal training.

Evidence submitted by AAT students for RPL assessment will normally fall within the first two categories. The wider range of RPL potential should not be overlooked if that learning can be evidenced and authenticated through a range of robust assessment activities.

Examples of the types of evidence which may be submitted for RPL assessment include:

- workplace documents
- witness testimonies
- personal statements
- professional discussion
- Assessor observation records
- records of voluntary activities
- certificates issued following an informal or formal course of learning. For certificated achievement a detailed specification of the learning/qualification gained will be needed in order to make the mapping process possible.

Assessors must be confident that a student's prior learning relates to the current standards of competence. The Assessor must identify the student's knowledge and skills, and determine how these can be mapped and assessed against the current standards. Assessors should consider whether there has been new legislation and whether technical changes in working methods have taken place since the candidate gained his/her knowledge. It may be that student's skills need refreshing or updating. Normally evidence up to 24 months old will be accepted.

Any minimal gaps in the student's skills and knowledge can be addressed through appropriate tuition and/or supplementary evidence. The supplementary evidence can be Assessor devised questions/tasks and answers, or workplace documents produced by the student and authenticated by the employer. In all cases, Assessors must consider the nature of the gaps in the evidence. If those gaps relate to fundamental areas of the unit, top up assessment would not be appropriate. All assessment criteria must be evidenced. Assessors should take note of *AAT Study and Assessment Guides* for further explanation of the assessment criteria and the range of evidence required.

All evidence of prior achievement, including supplementary evidence, must be mapped by the student to the assessment criteria and subsequently submitted for assessment.

Workplace evidence (WPE)

Some students may be able to generate assessment evidence from activities undertaken in their workplace. A list of units, together with relevant methods of assessment, is provided in Appendix 4.

Students who wish to present workplace evidence for assessment should be tasked to:

- collect workplace documents that evidence the assessment criteria for the unit
- explain their role in the production of the evidence. This explanation can be through a personal statement or statements on each piece of evidence and will provide the context for the Assessor.

There may be an opportunity for the Assessor to observe the candidate in the workplace and supply an observation statement to enhance the workplace documents.

Workplace evidence must always consist of workplace documents, questions and answers, and witness testimony.

A vital part of the evidence is a witness testimony from the employer confirming that the evidence has been produced by the student. The testimony must be on letter-headed paper, dated, signed and identify the position of the witness within the organisation.

If a student does not wish the employer to know that he/she is studying for an AAT Accounting qualification, or cannot obtain an employer witness testimony for some reason, then they must undertake an AAT computer based assessment.

Guidance for the assessment of RPL

The assessment process must be fair and not advantage/disadvantage any student.

Evidence of prior learning must be:

- valid - it should relate to the assessment criteria.
- authentic - it must be the student's own work
- current – it should normally be no more than 24 months old, except for areas:
 - where change is rapid and the 24 months guideline would be too long
 - where candidates can prove evidence is still valid.
- sufficient – it must meet all of the assessment criteria.

Each training provider will have their own approach to helping students who wish to present evidence of prior learning, but all should cover the following stages.

Students will be required to upload and submit all evidence for assessment through the assessment platform. Assessors and verifiers will also be required to upload and submit records of interviews and feedback they have provided. Please review the User Guides for information on scheduling, uploading and reviewing the assessment for assessing and verification purposes.

1. Initial assessment

The possibility of RPL as an assessment method should be recognised during initial assessment.

2. Advice and guidance

The Assessor should encourage the student to identify any prior learning which could be used as evidence. It should then become clear whether the student will be able to present sufficient evidence for the unit.

3. Assessment planning

The assessment planning process should formalise the approach to presenting evidence as well as help the student to become familiar with the standards.

4. Evidence collection

Assessors should support students by helping them to identify appropriate evidence.

5. Evidence mapping

The student should map the evidence to the assessment criteria, with support from the Assessor, using the AAT mapping sheets available on the assessment platform. This task is made easier if completed on an on-going basis rather than left until the end of the process.

6. Assessment

Training providers are required to schedule students for RPL assessment on the assessment platform.

The student will have a single opportunity to submit all their evidence for assessment.

The Assessor should review the evidence submitted by the student and award the appropriate assessment outcome. Internal Verifiers should review the assessment decision and add feedback for the Assessor.

7. Feedback

The Assessor should provide detailed feedback directly to the student. The feedback should be clear and comprehensive and indicate the next step in the process. The Assessor should submit a signed and dated copy of the feedback for review as part of the verification process.

8. Questioning

The Assessor may ask questions to plug any gaps in the evidence or strengthen weak areas. This process will also allow the Assessor to confirm the authenticity of evidence, should there be any doubt. A record of questions and answers should be signed and dated by the Assessor and student for review as part of the verification process.

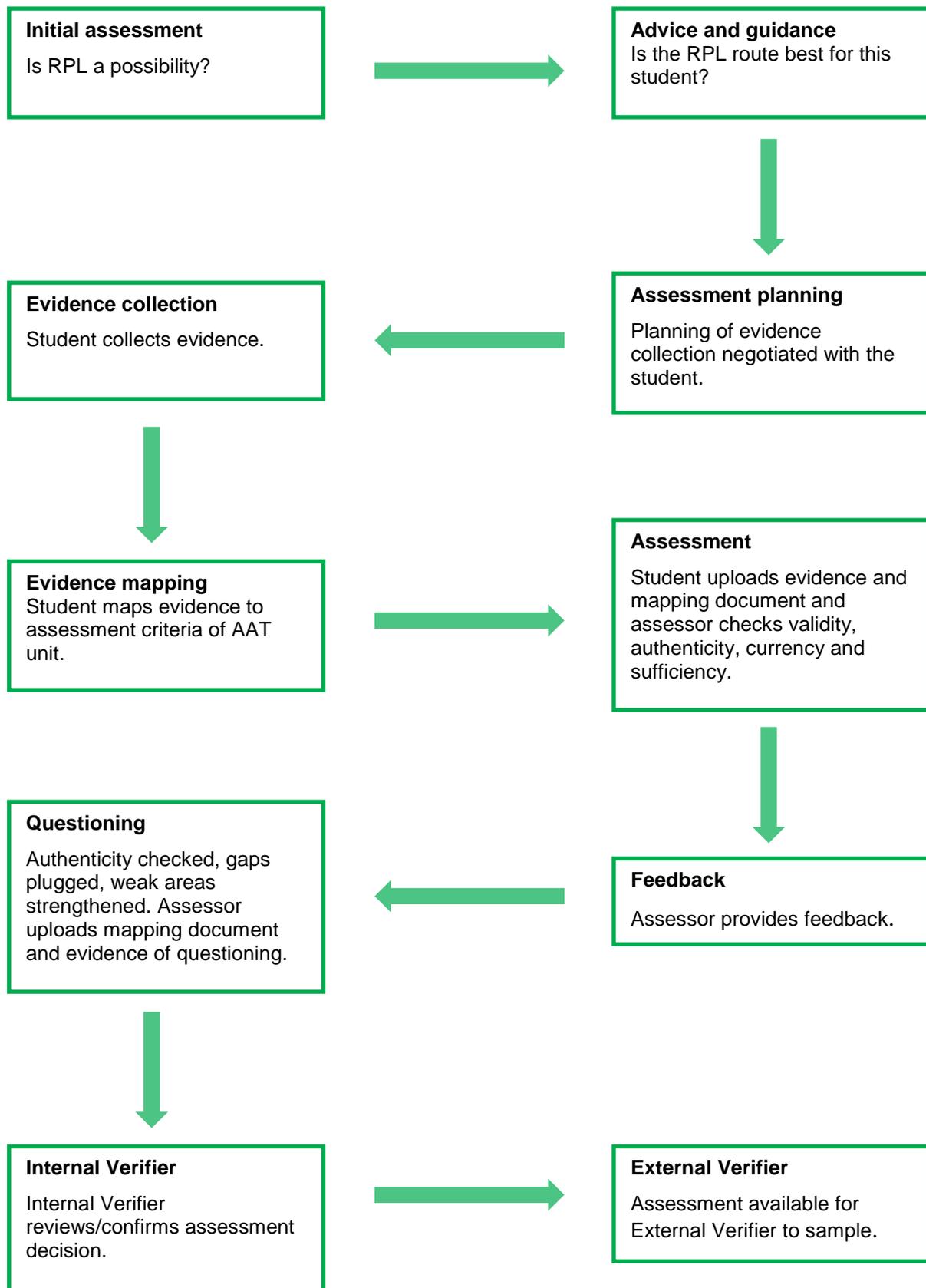
9. Internal verification

Once the assessment decision has been made the internal verification process can begin. In relation to workplace evidence, it is usual for Internal Verifiers to contact a sample of employers to authenticate employer witness testimonies.

10. External verification

Once the Internal Verifier has confirmed the assessment decision it will be available on the assessment platform for the External Verifier to sample.

The RPL process



Introduction to mapping toolkit

The purpose of this mapping toolkit is to provide examples of the types of evidence required from the workplace, from other prior achievement or from assessor devised scenarios and tasks. It is not exhaustive and is intended as a guidance aid.

The examples of evidence required have also been devised to assist assessors with the process of devising gap filling questions for students who are completing the unit through workplace evidence or through prior achievement. Assessors should apply their professional judgement to determine whether the provision of assessor devised questions is appropriate for the individual student based upon the workplace evidence and/or prior achievement evidence the student has submitted.

This document is for **training provider access only**.

Your students have access to separate mapping documents that they can use to map their evidence to the Assessment Criteria. The student mapping documents have been designed for electronic completion; the cells will expand to fit the text and your students can paste text into their mapping document. As students may be referring to an individual piece of evidence more than once within their evidence summary, we have advised that they will need to cross reference all pieces of evidence by giving each a unique number and refer to page number, paragraph number etc.

Note to assessor(s)

Workplace evidence should be the primary source of evidence for each unit in order to meet the requirements of an apprenticeship. If a student's situation does not present them with the opportunity to provide evidence for one unit or more through the workplace, you will need to evaluate each student's situation before you devise an appropriate activity, set in a realistic workplace environment, to enable the student to demonstrate competence in the relevant area(s). Please note that AAT will not be producing any assessment material for this qualification.

Students may map a single piece of evidence to more than one unit if that evidence meets the criteria for those units. Students and training providers need to ensure that the evidence is appropriately cross referenced and mapped so it can be reviewed by the relevant assessors/IV/EVs.

Scheduling and result reporting – The AAT assessment platform is used by training providers to schedule RPL assessments, access the students' submitted evidence and by the assessor to award an assessment outcome. Assessors award an outcome of Competent or Not Yet Competent. For more information or to schedule assessments please review the User Guide for the assessment platform.

| Unit | | Working in Teams | |
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| Unit aims | | By completing this unit the student will understand the principles of working in a team, leadership attributes and skills, and develop the skills to be able to work effectively in a team. | |
| Assessment criteria The student can: | | Guidance for training providers | |
| | | Examples of evidence required from the workplace, from other prior achievement or from assessor devised tasks. | |
| 1 | Understand the importance of teams to individual team members and to the team itself. | 1.1 | <p>Explain the advantages and disadvantages of team working.</p> <p>A personal statement from the student which</p> <ul style="list-style-type: none"> explains how working in a team has advantages and disadvantages to both the individual and the team and relates this to a workplace example. <p>(200 to 250 words – guidance approximate)</p> <p>Or oral or written questions and answers.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.2 | <p>Identify the factors that can contribute to a team's success.</p> <p>A personal statement from the student which</p> <ul style="list-style-type: none"> explains the characteristics of an effective team, and identifies 5 possible measures of success, and provides workplace examples to demonstrate this. <p>(200 - 250 words – guidance approximate)</p> <p>Or oral or written questions and answers.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.3 | <p>Identify the different roles and responsibilities within a team.</p> <p>A personal statement from the student which</p> <ul style="list-style-type: none"> identifies the reporting structure within their own organisation and how their job role fits into this, explains how their role relates to the wider organisational structure. provides an organisational chart or other workplace evidence to illustrate the comments made in the personal statement. <p>(200 to 250 words – guidance approximate)</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| | | 1.4 | Explain the stages of team development. | <p>A personal statement from the student which</p> <ul style="list-style-type: none"> identifies and describes 1 known model of team development e.g. Tuckman, Bass & Ryterband and relates this to a recent team development from their workplace or suggests how this model might be used in the student's workplace to guide an impending team formation <p>(200 to 250 words – guidance approximate)</p> <p>Or oral or written questions and answers.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.5 | Explain the personal skills and behaviours required of individuals in a team for effective team working. | <p>A brief report or presentation for line/team managers within the student's organisation on "Effective Teamwork – skills and behaviours required " so that this might inform and influence planned staff development.</p> <p>Or professional discussion.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.6 | Describe the working relationships in teams. | <p>The student could use the evidence provided in relation to AC1.3 to explain and describe the interaction between various roles within the organisation and explain that a person may carry out more than one role. Assessor questioning could be used to relate this to theory as outlined by Belbin.</p> <p>(200 to 250 words – guidance approximate)</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| 2 | Understand leadership attributes and skills. | 2.1 | Explain the difference between leadership and management. | <p>A personal statement from the student which</p> <ul style="list-style-type: none"> includes an organisational chart and some job descriptions (approximately 3) to highlight and describe the functions of management defined within it. explains the difference between leadership and management. <p>(200 to 250 words – guidance approximate)</p> <p>Or oral or written questions and answers.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| | | 2.2 | Evaluate the impact of different leadership styles on performance of individuals and a team. | <p>A personal statement from the student which</p> <ul style="list-style-type: none"> identifies and explains the leadership styles that exist within their own team or within their organisation uses their own performance appraisal to explain the impact of their line manager's leadership style on their own performance. <p>(200 to 250 words – guidance approximate)</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.3 | Explain skills and behaviour of team leaders required for successful leadership. | <p>A personal statement from the student which provides</p> <ul style="list-style-type: none"> a workplace example of a leader and explains the outcomes that the example has provided. workplace documents, such as directives and memos produced by managers, to demonstrate the different styles including skills and behaviours of leaders within their organisation. <p>(200 to 250 words – guidance approximate)</p> <p>Or oral or written questions and answers.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| 3 | Be able to contribute effectively to team work. | 3.1 | Use appropriate skills and behaviour when working as part of a team. | <p>A personal statement from the student which</p> <ul style="list-style-type: none"> identifies the necessary skills and behaviour required for effective teamwork. describes at least four consequences for them, their department and the organisation if conflicts of roles or personality clashes develop within a team. <p>(100 to 150 words – guidance approximate)</p> <p>Or employer witness testimony.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.2 | Assess own contribution to achieving team goals. | <p>A personal statement from the student which</p> <ul style="list-style-type: none"> uses a known methodology e.g. sociology or interaction analysis of analysing behaviour of individuals of a team within their own organisation <p>(200 to 250 words – guidance approximate)</p> <p>Or professional discussion.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| 4 | Understand how to manage potential conflicts within a team. | 4.1 | Explain how to identify and manage potential conflicts within a team. | <p>A personal statement from the student which gives</p> <ul style="list-style-type: none">• one example of where there has been dissatisfaction within the team within which they work and explains how this was resolved.• two examples of issues that the student would resolve themselves and two examples of issues that they would refer to a more senior manager. <p>(200 to 250 words – guidance approximate)</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
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| Unit | | Planning and delivering business communication activities | |
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| Unit aims | | By completing this unit the student will understand how to plan business communication activities and be able to communicate information verbally and in writing in a business environment. The unit will prepare students to contribute and lead discussions with senior colleagues, peers and clients in a professional business context. | |
| Assessment criteria The student can: | | Guidance for training providers | |
| | | Examples of evidence required from the workplace, from other prior achievement or from assessor devised tasks. | |
| 1 | Understand how to plan business communication activities. | 1.1 | Identify the purpose, the intended audience and desired outcomes of a communication activity. Alternatively evidence of prior achievement to cover the criterion could be presented. |
| | | 1.2 | Assess the effectiveness of business communications in achieving their purpose and desired outcomes. Alternatively evidence of prior achievement to cover the criterion could be presented. |
| | | 1.3 | Explain the purpose of and when to keep a file copy of what information has been communicated. Alternatively evidence of prior achievement to cover the criterion could be presented. |
| | | 1.4 | Explain the importance of reviewing written communications for errors and mistakes. Alternatively evidence of prior achievement to cover the criterion could be presented. |
| 2 | Be able to produce written business communications. | 2.1 | Prepare written communication using language as appropriate for the purpose, audience and desired outcomes including accurate grammar, spelling and punctuation, and plain English. A variety of business communications could be presented, these may include: <ul style="list-style-type: none"> • a complex report produced by the student • records of information sources and research undertaken • draft communications • amended documents • emails • memos • letters • presentations • minutes of meetings Any of these pieces of product evidence would need to be supported by a personal statement produced by the student or a professional discussion with assessor, to expand upon and contextualise the evidence and to explain how the student has met each aspect of the criterion. Alternatively evidence of prior achievement to cover the criterion could be presented. |

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| | | 2.2 | Present written information in a structure and style as appropriate for the purpose, audience and desired outcomes. | The evidence presented to meet AC 2.1 could also be used to cover this criterion. It would be made more robust and authentic by the student's line manager providing a Witness Testimony to confirm the student's involvement in preparing and presenting the communication. |
| 3 | Understand how to communicate verbally in a business environment. | 3.1 | Explain how to adapt own verbal contributions to professional discussions as appropriate to the audience, purpose of discussion, and the situation. | A personal statement or assessor-devised oral or written question response detailing how to adapt verbal contributions taking into account audience, purpose and situation. The evidence will be strengthened by the student giving specific examples of how they have achieved this in specific work related tasks within their job role. Alternatively evidence of prior achievement to cover the criterion could be presented. |
| | | 3.2 | Explain what body language and tone of voice to adopt for a specific audience and the situation. | A personal statement or assessor-devised oral or written question response giving details of body language and tone of voice to use specific to a given audience and situation. The evidence will be strengthened by the student giving specific examples of how they have achieved this in specific work related tasks within their job role. Alternatively evidence of prior achievement to cover the criterion could be presented. |
| 4 | Be able to communicate information verbally to the business environment. | 4.1 | Present information and ideas verbally so that they are clear, accurate, convincing and/or persuasive. | An observation report produced by the assessor of the student participating in a group meeting, one to one discussion or presentation situation. In addition a witness testimony produced by a line manager who can give detailed confirmation of the student's involvement in such a situation could be presented. Such evidence would be strengthened by supporting evidence which could include: Student discussion notes, Presentation notes, Minutes of the meeting. Alternatively evidence of prior achievement to cover the criterion could be presented. |
| | | 4.2 | Lead professional discussions to achieve pre-defined objectives. | An observation report produced by the assessor of the student participating in a group meeting, one to one discussion or presentation situation. In addition a witness testimony produced by a line manager who can give detailed confirmation of the student's involvement in such a situation could be presented. Such evidence would be strengthened by supporting evidence which could include: Student discussion notes, Presentation notes, Minutes of the meeting. Alternatively evidence of prior achievement to cover the criterion could be presented. |
| | | 4.3 | Adopt appropriate active listening techniques to gain information from others. | The evidence presented to meet AC 4.1 and 4.2 could be used to cover this criterion. This would need the addition of a student personal statement or a professional discussion with the assessor to expand upon and contextualise and explain how the student adopted active listening techniques to gain information from others. Alternatively evidence of prior achievement to cover the criterion could be presented. |
| | | 4.4 | Deliver well-argued responses to questions appropriate to the situation and audience. | Again, the evidence presented to meet AC 4.1 and 4.2 could be used to cover this criterion. The most valid and appropriate evidence suggestion would be observation and witness testimony as detailed in 4.1. This would require the addition of a student personal statement or assessor-devised oral or written question response to give specific details of the responses given. Alternatively evidence of prior achievement to cover the criterion could be presented. |

| Unit | | Evaluate and improve own performance in a business environment | | |
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| Unit aims | | By completing this unit the student will be able to take responsibility for evaluating their own performance in work tasks, then take responsibility for making and evaluating changes that make sure they will be able to work effectively and efficiently in a business environment alongside other people. | | |
| Assessment criteria The student can: | | Guidance for training providers | | |
| | | Examples of evidence required from the workplace, from other prior achievement or from assessor devised tasks. | | |
| 1 | Understand how to evaluate and improve own performance. | 1.1 | Analyse the purpose and benefits of continuously improving work. | <p>A student report may be produced by the student which includes analysis of the purpose and benefits of continuously improving work. This analysis should be detailed and look at a minimum of 2 benefits.</p> <p>A reflective account or professional discussion can be used. Oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and benefits of continuously improving work.</p> |
| | | 1.2 | Evaluate the purpose and benefits of encouraging and accepting feedback from others. | <p>A student report may be produced by the student which includes clear evaluation of both the purpose and the benefits of encouraging and accepting feedback from others</p> <p>A reflective account or professional discussion can be used. Oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and benefits of continuously improving work.</p> |
| | | 1.3 | Analyse ways of evaluating own work. | <p>A student report may be produced by the student which includes clear analysis of at least 2 ways of evaluating their own work</p> <p>A reflective account or professional discussion can be used. Oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and benefits of continuously improving work.</p> |
| | | 1.4 | Evaluate the purpose and benefits of trying out possible improvements to own work. | <p>A student report may be produced by the student which includes detailed evaluation of the purpose and the benefits of trying out possible improvements to own work.</p> <p>A reflective account or professional discussion can be used. Oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and benefits of continuously improving work.</p> |
| | | 1.5 | Analyse how learning and development can improve own work, benefit organisations, and further own career. | <p>A student report may be produced by the student which includes in-depth analysis of the ways in which learning and development can improve own work, benefit organisations, and further own career</p> <p>A reflective account or professional discussion can be used. Oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and benefits of continuously improving work.</p> |

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| | | 1.6 | Evaluate possible career progression routes and the opportunities they offer. | <p>A student report may be produced by the student which includes detailed evaluation of at least two career progression routes and the opportunities they offer.</p> <p>A reflective account or professional discussion can be used. Oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and benefits of continuously improving work.</p> |
| | | 1.7 | Analyse possible development opportunities and the benefits they offer. | <p>A student report may be produced by the student which includes in depth analysis of possible development opportunities and the benefits they offer. This should include two development opportunities.</p> <p>A reflective account or professional discussion can be used. Oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and benefits of continuously improving work.</p> |
| | | 1.8 | Evaluate the advantages and disadvantages of a learning plan. | <p>A student report may be produced by the student which includes detailed evaluation of learning plans including advantages and disadvantages.</p> <p>A reflective account or professional discussion can be used. Oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and benefits of continuously improving work.</p> |
| 2 | Be able to evaluate and improve own performance using feedback from others. | 2.1 | Encourage and accept feedback from other people. | <p>Evidence for this outcome could come from observation of activity in the workplace.</p> <p>The following forms of evidence could also be utilised:</p> <ul style="list-style-type: none"> • employer witness testimonies • professional discussion • reflective accounts <p>or from the inspection of work products which are relevant to the students role such as;</p> <ul style="list-style-type: none"> • performance reviews • appraisals <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| | 2.2 | Make recommendations to improve work performance. | <p>Evidence for this outcome could come from observation of activity in the workplace. The following forms of evidence could also be utilised:</p> <ul style="list-style-type: none"> • employer witness testimonies • professional discussion • reflective accounts <p>or from the inspection of work products which are relevant to the students role such as;</p> <ul style="list-style-type: none"> • performance reviews • appraisals • memos or emails • letters or reports <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | 2.3 | Complete work tasks, consistently using recommended new ways of working. | <p>Evidence for this outcome could come from employer witness testimonies</p> <p>The following forms of evidence could also be utilised:</p> <ul style="list-style-type: none"> • professional discussion • reflective accounts <p>or from the inspection of work products which are relevant to the students role such as tasks from the workplace which have been completed using recommended new ways of working.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | 2.4 | Evaluate work completed for improvements and effectiveness. | <p>Evidence for this outcome could come from employer witness testimonies</p> <p>The following forms of evidence could also be utilised:</p> <ul style="list-style-type: none"> • professional discussion • reflective accounts <p>or from the inspection of work products which are relevant to the students role such as tasks from the workplace which have been completed and evaluated.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | 2.5 | Evaluate changes made for improvements and effectiveness. | <p>Evidence for this outcome could come from reflective accounts.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| 3 | Be able to use evaluation and feedback to develop and use a learning plan. | 3.1 | Evaluate own performance, using feedback from others, and identify where further learning and development will improve own work. | <p>Evidence for this outcome could come from reflective accounts.</p> <p>The following forms of evidence could also be utilised:</p> <ul style="list-style-type: none"> • inspection of work products which are relevant to the student's role such as; <ul style="list-style-type: none"> • performance reviews • appraisals <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.2 | Make recommendations and develop a learning plan to improve own work performance, that meets own needs. | <p>Evidence for this outcome could come from reflective accounts or from the inspection of work products which are relevant to the student's role, such as learning plans.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.3 | Implement a learning plan for improvement to own work. | <p>Evidence for this outcome could come from reflective accounts or from the inspection of work products which are relevant to the student's role, such as learning plans.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.4 | Review and evaluate progress against learning plan and make updates for improving own work and further learning. | <p>Evidence for this outcome could come from reflective accounts or from the inspection of work products which are relevant to the student's role, such as learning plans.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

| Unit | | Spreadsheet software | | |
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| Unit aims | | The objective of this unit is to equip the student with a range of spreadsheet skills to enable them to complete both routine and non-routine tasks in the workplace using spreadsheets. It will enable the student to design and use spreadsheets for a range of accounting purposes using formulas, functions and data analysis tools available on all common spreadsheet software. | | |
| Assessment criteria The student can: | | Guidance for training providers | | |
| | | Examples of evidence required from the workplace, from other prior achievement or from assessor devised tasks. | | |
| 1 | Use a spreadsheet to enter, edit and organise numerical and other data | 1.1 | Identify what numerical and other information is needed in the spreadsheet and how it should be structured | Using a spreadsheet designed by the student and used in their workplace the student should: <ul style="list-style-type: none"> identify what numerical and other information was needed for input into the spreadsheet explain the structure of the worksheet and why it is structured in this way. <p>At this level students are required to design the worksheet.</p> |
| | | 1.2 | Enter and edit numerical and other data accurately | Using the spreadsheet provided in AC 1.1 or any other that the student uses in the workplace the student should identify the data (numerical and non-numerical) that was input by themselves and identify the checks they did to ensure the data has been input accurately. |
| | | 1.3 | Combine and link data from different sources | The student should combine and link data from different sources within a spreadsheet produced in the workplace. Students should, as a minimum, either use 'look up' to link worksheets or combine data from a range of sources (e.g. word document and an excel document) |
| | | 1.4 | Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available | The student should show evidence that they can store and retrieve spreadsheet files in line with their own organisational procedures, for example screen shot or printouts showing file/folder names. |
| 2 | Select and use appropriate formulas and data analysis tools and techniques to meet requirements | 2.1 | Explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them | The student should explain the methods used to summarise, analyse and interpret spreadsheet data based upon one or more spreadsheets they use in their workplace. Note this may be covered by the evidence presented in AC 2.3. |
| | | 2.2 | Select and use a wide range of appropriate functions and formulas to meet calculation requirements | The student should present as evidence spreadsheet(s) they have produced and that are used in the workplace and explain how, in these spreadsheets, they selected and used a wide range of both appropriate functions and formulae to make calculations. |
| | | 2.3 | Select and use a range of tools and techniques to analyse and interpret data to meet requirements | The student should present as evidence spreadsheet(s) they have produce and that are used in the workplace and explain how, in these spreadsheets, they selected and used a range of tools and techniques to analyse and interpret data to meet organisational needs including using either a pivot table or ranking of data. |
| | | 2.4 | Select and use forecasting tools and techniques | The student should present as evidence spreadsheet(s) they have produced and that are used in the workplace and explain their choice and use of forecasting tools and techniques (including either 'IF' statement or trend line). |

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| 3 | Use tools and techniques to present, and format and publish spreadsheet information | 3.1 | Explain how to present and format spreadsheet information effectively to meet needs | The student should present as evidence spreadsheet(s) they have produced and that are used in the workplace and explain how they have presented and formatted the information to meet organisational needs. Note: This may be covered by the evidence presented for AC 3.2 and AC 3.4. |
| | | 3.2 | Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively | The student should present as evidence spreadsheet(s) they have produced and that are used in the workplace and explain their choice and use of an appropriate tools and techniques to format spreadsheets, cells, rows, columns and worksheets to meet organisational needs (e.g. cell width, height, currency, coloured cells) |
| | | 3.3 | Select and use appropriate tools and techniques to generate, develop and format charts and graphs | The student should present as evidence spreadsheet(s) they have produced and that are used in the workplace and explain their choice and use of an appropriate tools and techniques to generate, develop and format charts and graphs, including either a chart or a graph showing use of titles and legends. |
| | | 3.4 | Select and use appropriate page layout to present, print and publish spreadsheet information | The student should present as evidence spreadsheet(s) they have produced and that are used in the workplace and explain their choice and use of appropriate page layout to present, print and publish spreadsheets. Note: This may be covered by the evidence presented for AC 1.1 and AC 3.3 |
| | | 3.5 | Explain how to find and sort out any errors in formulas | The student should present as evidence spreadsheet(s) they have produce and that are used in the workplace and explain how they have recognised errors in formulae and how they have rectified these, e.g. use of error checking. Note: This may be covered by evidence presented for AC 3.6 and AC 3.7. |
| | | 3.6 | Check spreadsheet information meets needs, using IT tools and making corrections as necessary | The student should explain or demonstrate how they check spreadsheets meet needs using IT tools and how they make corrections if needed, including either the use of data validation or error checking. |
| | | 3.7 | Use auditing tools to identify and respond appropriately to any problems with spreadsheets | The student should present as evidence spreadsheet(s) they have produced and that are used in the workplace and which demonstrates their use of auditing tools to identify and correct any problems within it, for example show on a spreadsheet where audit tools (including either error checking or data validation) have been used and any changes made). Note: This may be covered by evidence presented for AC 3.6. |

| Unit | | Presentation software | |
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| Unit aims | | This unit is about the ability to use software applications to produce effective presentations, which include a combination of media (e.g. images, animation and sound) for education, entertainment or information sharing. This unit is about the skills and knowledge required by an IT user to select and use a wide range of advanced presentation software tools and techniques effectively to produce presentations that are complex or non-routine | |
| Assessment criteria The student can: | | Guidance for training providers | |
| | | Examples of evidence required from the workplace, from other prior achievement or from assessor devised tasks. | |
| 1 | Input and combine text and other information within presentation slides. | 1.1 | <p>Explain what types of information are required for the presentation.</p> <p>Explanation with examples or responses by student to questions from assessor (written or oral) regarding presentations prepared by the student, or other presentations that are available. The evidence must include all types of information required for a presentation and how they are used. The types of information include text, numbers, images, graphics, sound, video and animated sequences.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.2 | <p>Enter text and other information using layouts appropriate to type of information.</p> <p>Examples in presentations prepared by the student and confirmed as their own work of different layouts. The evidence must include text of different sizes, fonts, colours and shapes.</p> <p>Observation by an assessor or accredited witness of a student using different layouts.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.3 | <p>Insert charts and tables and link to source data.</p> <p>Examples in presentations prepared by the student and confirmed as their as own work of inserting charts and tables with link to source data. As a minimum, charts and tables must include at least three of the following: pie charts, graphs, diagrams, organisational charts and flow charts.</p> <p>Observation by an assessor or accredited witness of a student inserting charts and tables with link to source data.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.4 | <p>Insert images, video or sound to enhance the presentation.</p> <p>Examples in presentations prepared by the student and confirmed as their own work of inserting images, video or sound. Images for presentations must include: clip art, photos, scanned images, image formats.</p> <p>Observation by an assessor or accredited witness of a student inserting images, video or sound.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |

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| | | 1.5 | Identify any constraints which may affect the presentation. | <p>Explanation with examples or responses by student to questions from assessor (written or oral) on constraints that affect presentations prepared by student or other presentations. Constraints must include legal, statutory, organisational and physical factors.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met</p> |
| | | 1.6 | Organise and combine information for presentations in line with any constraints. | <p>Examples in presentations prepared by the student and confirmed as their own work of combining and organising information in line with constraints identified in 1.5. Evidence must include:</p> <ul style="list-style-type: none"> • updating and merging slides from different files and users; • combining images, charts and tables with text by inserting, re-sizing and repositioning; • resizing text boxes and • inserting images, video or sound. <p>Observation by an assessor or accredited witness of a student combining and organising information in line with constraints.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.7 | Store and retrieve presentation files effectively, in line with local guidelines and conventions where available. | <p>Observation by an assessor or accredited witness of a student storing and retrieving presentation files. Student must explain how storage and retrieval of presentation files complies with local guidelines and conventions. Evidence must include the use of Save; Save as; Find; Rename; Open; Password protection; and Close.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| 2 | Use presentation software tools to structure, edit and format presentations. | 2.1 | Explain when and how to use and change slide structure and themes to enhance presentations. | <p>Explanation with examples or responses by student to questions from assessor (written or oral) on when and why different structures and themes are used. Evidence must include the different layouts and templates available, organisational guidelines which affect the presentation design, different structures and themes and why they may need to be changed.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met</p> |
| | | 2.2 | Create, amend and use appropriate templates and themes for slides. | <p>Observation by an assessor or accredited witness of a student preparing slides using appropriate templates and themes as indicated in AC 2.1 and taking into account organisational guidelines.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.3 | Explain how interactive and presentation effects can be used to aid meaning or impact. | <p>Explanation with examples, or responses by student to questions from assessor (written or oral) on different effects and why they might be used. The different effects must include; video, sound, animation, hyperlink, slide transition, visual and sound effects.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met</p> |

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| | | 2.4 | Select and use appropriate techniques to edit and format presentations to meet needs. | <p>Examples in presentations prepared by the student and confirmed as their own work of editing and formatting presentations. Evidence of editing should include change to size of text, wrap text, move objects, change slide order, delete slides, add lines, add objects, and change orientation. Evidence of formatting must include use of a master slide and different backgrounds, colours, fonts and orientation.</p> <p>Observation by an assessor or accredited witness of the student editing and formatting a presentation.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.5 | Create and use interactive elements to enhance presentations. | <p>Examples in presentations prepared by the student and confirmed as their own work of creating and using interactive elements. The different interactive elements must include: video; sound; animation; hyperlink; slide transition; and visual and sound effects.</p> <p>Observation by an assessor or accredited witness of the student creating and using interactive elements.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.6 | Select and use animation and transition techniques appropriately to enhance presentations. | <p>Examples in presentations prepared by the student and confirmed as their own work of using animation and transition techniques. Evidence must include adding and removing hyperlinks, applying and creating transitions, and applying animations.</p> <p>Observation by an assessor or accredited witness of a student using animation and transition techniques.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| 3 | Prepare interactive slideshow for presentation. | 3.1 | Explain how to present slides to communicate effectively for different contexts. | <p>Explanation with examples or responses by student to questions from assessor (written or oral) on objectives of presentations taking into account different factors. Evidence must include the audience and its needs, organisational requirements, the content, the location, and timing.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met</p> |
| | | 3.2 | Prepare interactive slideshow and associated products for presentation. | <p>Examples in presentations prepared by students and confirmed as own work of preparing an interactive slideshow and must include: viewing slides; reordering slides; rehearsing timing; rehearsing effects; setting up slide show; printing slides; and printing hand-outs or speaker notes. Observation by an assessor or accredited witness of a student preparing an interactive slideshow with slide prints, hand-outs or speaker notes.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |

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| | 3.3 | Check presentation meets needs, using IT tools and making corrections as necessary. | <p>Examples in presentations prepared by the student and confirmed as their own work. Evidence of checking must include checking the choice and suitability of content in relation to audience; undertaking spell and grammar checks; reviewing layout, format, timing and effects; and making relevant changes after consideration of above.</p> <p>Observation by an assessor or accredited witness of a student checking and making corrections in order to meet needs.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met.</p> |
| | 3.4 | Evaluate presentations, identify any quality problems and discuss how to respond to them. | <p>Copies of evaluation responses from others or explanation by student of own result of evaluation. Explanation by student of different types of evaluation of presentations and the different stakeholders involved.</p> <p>Summary by the student of improvements the evaluation has identified which are within own authority to make (this links closely with AC 3.5).</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met</p> |
| | 3.5 | Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose. | <p>Explanation by student of changes made to presentations following evaluations (see 3.4) to ensure fitness for purpose.</p> <p>The student may produce evidence from prior achievement which demonstrates that this criterion has been met</p> |

| Unit | | Deliver a presentation | | |
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| Unit aims | | This unit covers the skills, knowledge and understanding students need to prepare for, deliver and evaluate a presentation for an audience. | | |
| Assessment criteria The student can: | | Guidance for training providers | | |
| | | Examples of evidence required from the workplace, from other prior achievement or from assessor devised tasks. | | |
| 1 | Understand the purpose of preparing for and evaluating a presentation. | 1.1 | Explain the purpose of using different types of presentation and equipment. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands why different presentations and equipment are appropriate for different audiences and situations. |
| | | 1.2 | Explain different ways of delivering presentations and their features. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands different ways to deliver presentations and their features. As a minimum students should include an explanation of three of the following methods: <ul style="list-style-type: none"> - a flip chart - an overhead projector (OHP) and overhead transparencies (OHT) - presentation software - interactive whiteboards. <p>Students should be able to identify at least one advantage and one disadvantage of the three types of presentation.</p> |
| | | 1.3 | Explain the procedures to be followed when preparing a presentation. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands procedures to be followed when planning a presentation. As a minimum the student should identify the following procedures: <ul style="list-style-type: none"> - planning well in advance of the presentation date, including researching topic - evaluating the potential audience and how knowledgeable they are likely to be on the subject being presented - establishing the most appropriate presentation style for the audience - establishing objectives - establishing the time available for the presentation - selecting the most appropriate method of presentation - considering resources needed - practising the delivery of the presentation. <p>Students do not need to write a presentation or use presentation software. They may use a presentation prepared by themselves for another unit, for example Presentation Software.</p> <p>Alternatively, students may use a presentation prepared by others.</p> |
| | | 1.4 | Explain the benefits of preparing for giving a presentation. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands at least three benefits of preparing well for giving a presentation. |

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| | | 1.5 | Describe the types of problems that may occur with equipment and how to deal with them. | A description, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands at least one problem and a solution relating to at least two types of equipment. |
| | | 1.6 | Explain the purpose and benefits of contingency planning. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and benefit of at least two contingency planning points. |
| | | 1.7 | Explain the purpose and benefits of collecting feedback from the audience on the presentation. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and at least one benefit of collecting feedback following a presentation. |
| | | 1.8 | Explain the purpose and benefits of evaluating presentations and own performance. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and at least one benefit of evaluating presentations and own performance. |
| 2 | Understand the techniques used in enhancing a presentation. | 2.1 | Explain and illustrate how presentations may be enhanced by materials and equipment. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands how presentations may be enhanced by materials and equipment. As a minimum the student should be able to give at least two examples of how materials can enhance presentations and two examples of how equipment can enhance presentations. |
| | | 2.2 | Explain and illustrate how presentations may be enhanced by use of communication and interpersonal skills. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands how presentations may be enhanced by good communication and interpersonal skills. As a minimum the student should be able to give at least two examples of how communication and interpersonal skills can enhance presentations. |
| | | 2.3 | Describe how to gauge audience reaction to the presentation. | A description, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands how to gauge the audience's reaction to the presentation. |
| | | 2.4 | Explain the purpose and benefits of summarising important features of the presentation. | An explanation, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands the usefulness of summarising key points at appropriate times during the presentation. |
| | | 2.5 | Describe the purpose and benefits of giving the audience opportunities to ask questions. | A description, or assessor-devised oral or written questions and answers, or evidence of prior achievement that shows the student understands the purpose and at least one benefit of question and answer opportunities during the presentation. |
| 3 | Be able to prepare for delivery of a presentation. | 3.1 | Select any equipment needed and plan how to use it to best effect. | An assessor observation report, or employer witness testimony, or evidence of prior achievement that shows the student has selected appropriate equipment and planned to use it effectively. |
| | | 3.2 | Make contingency plans in case of equipment failure or other problems, if required. | An assessor observation report, or employer witness testimony, or evidence of prior achievement that shows the student has made contingency plans in case of equipment failure or other problems. |
| | | 3.3 | Practise the presentation and its timing. | An assessor observation report, or employer witness testimony, or evidence of prior achievement that shows the student has practised the presentation and its timing. Students do not need to write the presentation or use presentation software. They may use a presentation prepared by themselves for another unit, for example Presentation Software. Alternatively, students may use a presentation prepared by others. |
| | | 3.4 | Obtain feedback on planned presentation and make adjustments, if required. | Copies of written feedback received, an assessor observation report, employer witness testimony, or evidence of prior achievement that shows the student has obtained feedback on the planned presentation and made adjustments in light of the feedback. |

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| 4 | Be able to deliver a presentation. | 4.1 | Check equipment and resources. | An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation. Alternatively evidence of prior achievement is acceptable. The evidence must show the student has checked the equipment and resources prior to the presentation. |
| | | 4.2 | Circulate presentation materials. | Copies of documents referring to circulation of materials, or an assessor observation report following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation. Alternatively evidence of prior achievement is acceptable. The evidence must show the student has circulated presentation materials. |
| | | 4.3 | Introduce self to audience and state aims of the presentation. | An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation. Alternatively evidence of prior achievement is acceptable. The evidence must show the student has introduced self to audience and stated the aims of the presentation. |
| | | 4.4 | Address the audience, speaking clearly and confidently, using language to suit the topic and audience. | An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation. Alternatively evidence of prior achievement is acceptable. The evidence must show the student has addressed the audience with clarity and confidence and using appropriate language. |
| | | 4.5 | Vary tone, pace and volume to emphasise key points. | An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation. Alternatively evidence of prior achievement is acceptable. The evidence must show the student has varied the tone, pace and volume of the presentation in order to emphasise key points. |
| | | 4.6 | Gauge audience reaction during the presentation and adapt if required. | An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation. Alternatively a reflective account from the student or evidence of prior achievement is acceptable. The evidence must show the student has assessed the reaction of the audience during the presentation and made adjustments to allow for that reaction. If no adjustments were necessary evidence of oral or written questions and answers is acceptable for this part of the assessment criteria. |
| | | 4.7 | Summarise throughout the presentation to emphasise key points and help to maintain audience interest. | An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation. Alternatively evidence of prior achievement is acceptable. The evidence must show the student has summarised key points during the presentation at appropriate intervals. |
| | | 4.8 | Use body language in a way that reinforces presented information. | An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation. Alternatively a reflective account from the student or evidence of prior achievement is acceptable. The evidence must show the student has used body language effectively to reinforce the information being presented. |

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| | | 4.9 | Use equipment, where appropriate, to enhance the presentation, and deal with any problems that may occur. | <p>An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation.</p> <p>Alternatively a reflective account from the student or evidence of prior achievement is acceptable. The evidence must show the student has used equipment to enhance the presentation and dealt with problems that occurred. If no problems occurred during the presentation, evidence of oral or written questions and answers is acceptable for this part of the assessment criteria.</p> |
| | | 4.10 | Provide the audience with opportunities to ask questions. | <p>An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation.</p> <p>Alternatively evidence of prior achievement is acceptable. The evidence must show the student has ensured the audience had opportunities to ask questions.</p> |
| | | 4.11 | Listen carefully to questions and respond in a way that meets the audience's needs. | <p>An assessor observation report or employer witness testimony following observation of a presentation in the workplace or in a college environment, or following viewing of a recording of the presentation.</p> <p>Alternatively evidence of prior achievement is acceptable. The evidence must show the student has listened carefully to questions from the audience and responded appropriately.</p> <p>There should be a minimum of three people in the audience but there is no requirement for students to handle a variety of audiences, for example hostile or challenging.</p> |
| 5 | Be able to evaluate a presentation | 5.1 | Collect feedback on the presentation. | Copies of feedback documents or evidence of prior achievement that shows the student has collected feedback following a presentation. |
| | | 5.2 | Reflect on own performance and identify learning points. | Personal statement, employer witness testimony or evidence of prior achievement that shows the student has reflected on own performance, alone or with others, and identified negative points. |
| | | 5.3 | Evaluate the presentation and own performance and identify changes that will improve future presentations. | Personal statement or evidence of prior achievement that shows the student has identified at least two improvements for future presentations. |

| Unit | | Organising and facilitating meetings and workshops | | |
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| Unit aims | | By completing this unit the student will be able to take responsibility for organising, preparing for and facilitating meetings and workshops. The unit will prepare students for leading meetings where attendees are of similar level of seniority. | | |
| Assessment criteria The student can: | | Guidance for training providers | | |
| | | Examples of evidence required from the workplace, from other prior achievement or from assessor devised tasks. | | |
| 1 | Be able to take responsibility for meeting and workshop arrangements. | 1.1 | Set up meetings and workshops using calendar / scheduling software. | <p>Copies of documents the student has produced that show the student's practice e.g.</p> <ul style="list-style-type: none"> • memos and emails - invites to prospective attendees. <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.2 | Manage the communications regarding meeting and workshop arrangements with: • intended audience • venue, technology and catering providers, as necessary. | <p>Copies of documents the student has produced that show the student's practice e.g.</p> <ul style="list-style-type: none"> • memos and emails to: a) prospective attendees and b) resource specialists. • records of telephone conversations relating to the meeting/workshop organisation. <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.3 | Assess the needs of the context and audience for meetings and workshops to determine requirements, including venue, audio/visual technology and catering. | <p>Copies of documents the student has produced, with a personal statement, that show the student's practice and understanding e.g.</p> <ul style="list-style-type: none"> • records of discussions relating to meeting and workshop content. • planning session content. • venue floor plans with notes. • blank and completed in-house visual aid and catering forms with relevant explanation of use. <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| 2 | Understand how to facilitate meetings and workshops. | 2.1 | Assess how to structure meetings and workshops appropriate to the context, objectives and audience of meetings and workshops. | <p>Copies of documents the student has produced, with a personal statement, that show the student's practice and understanding e.g.</p> <ul style="list-style-type: none"> • records of discussions relating to meeting and workshop content. • memos and emails relating to meeting and workshop context/structure/objectives. <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| | | 2.2 | Assess different methods of communicating information in meetings and workshops. | <p>Copies of documents the student has produced, with a personal statement, that show the student's practice and understanding e.g.</p> <ul style="list-style-type: none"> • discussion notes relating to discussions about how to communicate information in meetings and workshops • draft and complete slides, leaflets etc. • plan of workshop activities to aid reception of information. • emails etc relating to possible methods of communicating information. <p>Or oral or written questions and answers.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.3 | Assess what questions are relevant to the meeting situation and audience. | <p>Copies of documents the student has produced, with a personal statement, that show the student's practice and understanding e.g.</p> <ul style="list-style-type: none"> • notes (author produced and discussion) and discuss relating to possible questions that could arise prior to meetings and workshops • discussion notes relating to how to deal with questions that are posed during meetings and workshops <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.4 | Assess when it is appropriate to give others opportunity to verbally contribute ideas and opinions. | <p>Copies of documents the student has produced that show the student's practice and understanding e.g.</p> <ul style="list-style-type: none"> • meeting minutes indicating who spoke on which issues. • plan of workshop activities which encourage contribution of ideas and opinions. <p>Or a reflective account or professional discussion.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| 3 | Be able to facilitate meetings and workshops. | 3.1 | Establish ground rules, purpose and objectives for meetings and workshops. | <p>Copies of documents the student has produced that show the student's practice e.g.</p> <ul style="list-style-type: none"> • minutes of meetings showing discussion relating to how they should be managed. • notes relating to workshops and how attendees' behaviour is managed. <p>Or a reflective account or professional discussion.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.2 | Lead a meeting and workshop to achieve objectives | <p>Copies of documents the student has produced, with witness testimony or assessor observation that shows the student's practice e.g.</p> <ul style="list-style-type: none"> • notes/memos/emails relating to leadership of meetings and workshops. • meeting minutes noting role of chairperson. <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| | | 3.3 | Communicate information clearly at appropriate points during meetings and workshops | <p>Copies of documents the student has produced, with witness testimony or assessor observation that shows the student's practice e.g.</p> <ul style="list-style-type: none"> notes relating to methodology used to select appropriate points at which to communicate relevant information. |
| | | 3.4 | Summarise discussions and decisions during meetings and workshops to the appropriate level of detail | <p>Copies of documents the student has produced, with personal statement or assessor observation, that show the student's practice e.g.</p> <ul style="list-style-type: none"> summaries produced during meetings and workshops and indication of action taken to communicate these. <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.5 | Record meeting actions and decisions | <p>Copies of documents the student has produced that show the student's practice e.g.</p> <ul style="list-style-type: none"> notes relating to actions and decisions made at meetings and workshops. <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.6 | Review progress against actions as appropriate | <p>Copies of documents the student has produced that show the student's practice e.g.</p> <ul style="list-style-type: none"> meeting notes relating to reviews of workshop activities. <p>Or a reflective account or professional discussion.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

| Unit | | Developing commercial awareness | | | |
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| Unit aims | | By completing this unit the student will develop an understanding of their own employer's business, the business of its clients and how relationships are managed between their own employer and its clients, and the implications of a business operating ethically. | | | |
| Assessment criteria The student can: | | Guidance for training providers | | | |
| | | Examples of evidence required from the workplace, from other prior achievement or from assessor devised tasks. | | | |
| 1 | Understand own employer's business. | 1.1 | Explain own employer's objectives and strategy and its position in the market. | <p>A personal statement by the student that explains the organisation's business activity, objectives and strategy and market position. Students should include at least two strategic and one operational objective and identify one main competitor. This should be supported by a copy of the employer business mission statement and evidence to illustrate current market position.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> | |
| | | 1.2 | Explain own employer's organisational structure and that of its senior leadership team. | <p>A personal statement by the student that explains the overall size of the business and extent of operations at the local, national or global level, and a copy of an Organisation Chart suitably annotated.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> | |
| | | 1.3 | Analyse the services and/ or products own employer provides and how it makes money. | <p>A personal statement by the student that analyses the services/products provided by employer and the main markets. This should be supported by documentary evidence, for example extracts from company reports, share issues, news releases on proposed takeovers and mergers.</p> <p>A reflective account or professional discussion can also be used.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> | |
| | | 1.4 | Explain how own employer adds value to its clients through the services and/or products it provides. | <p>A personal statement by the student that provides at least two examples of how the employer adds value to its clients through the products and services it provides. Examples may be drawn from after sales service, warranties and guarantees; repeat business, new clients and special orders, reputation, benefits to the community, research and development.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> | |
| 2 | Understand how relationships are managed between own employer and its clients. | 2.1 | Evaluate own employer's and client's role and responsibilities on a project. | <p>A personal statement by the student that evaluates employer and client responsibility on an actual project. Students should outline the time scale for the project and the contractual relationship between the employer business and client business.</p> <p>A reflective account or professional discussion can also be used.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> | |

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| | | 2.2 | Explain the contractual obligations that apply between own employer and client. | <p>A personal statement by the student that explains contractual obligations between employer and client. For example, types and terms of contract, codes of practice, Supply of Goods and Services Act 2013.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.3 | Evaluate the impact on individuals and own employer of not fulfilling agreements made with colleagues, clients and stakeholders. | <p>A personal statement by the student that evaluates the impact on individuals and employer of not fulfilling contractual obligations. For example, impact of consumer protection law, employment law and Remedies. Students are expected to cover the section of law which is most relevant. A reflective account or professional discussion can also be used.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| 3 | Understand a client's business. | 3.1 | Analyse a client's organisational structure and that of its senior management team. | <p>A personal statement by the student that analyses a client's organisational structure and management team. This should be supported by a copy of an Organisation Chart suitably annotated. Students should clearly indicate the overall size of business and extent of operations at the local, national or global level.</p> <p>A reflective account or professional discussion can also be used.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.2 | Explain what services and/ or products a client provides and how it makes money. | <p>A personal statement by the student that identifies the services/products provided by a client and the main markets. This should be supported by documentary evidence, for example extracts from company reports, share issues, news releases on proposed takeovers and mergers.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.3 | Analyse the objectives and strategy of a clients' business and its position in the market. | <p>A personal statement by the student that analyses the objectives and strategy of a client's business and its position in the market. This should be supported by documentary evidence, for example, extracts from company reports, share issues, news releases on proposed takeovers and mergers.</p> <p>A reflective account or professional discussion can also be used.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| 4 | Understand the implications of operating ethically. | 4.1 | Explain what operating ethically means in a business context. | <p>A personal statement by the student that explains operating ethically in business. For example, a description of specific behaviour in the employer or client business that demonstrates and fails to demonstrate the five fundamental principles (integrity, confidentiality, professional behaviour, objectivity and professional competence).</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| | | 4.2 | Explain the implications for a business and its stakeholders of operating ethically. | <p>A personal statement by the student that explains the importance of compliance with ethical principles, appropriate v inappropriate behaviour, impact of breaching the ethical code of conduct.</p> <p>Alternatively the student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
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| Unit | | Managing project finances | | |
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| Unit aims | | By completing this unit the student will develop the skills of budget development and management of costs against a budget, and will be able to complete financial transactions and evaluate project costs. The student will understand the requirements of compliance. | | |
| Assessment criteria The student can: | | Guidance for training providers | | |
| | | Examples of evidence required from the workplace, from other prior achievement or from assessor devised tasks. | | |
| 1 | Be able to develop a budget for a project. | 1.1 | Estimate the costs of different project options, in parallel with other planning processes (including scope, schedule and resource management). | <p>A personal statement by the student explaining how they identified at least 2 project options and a copy of the related cost estimates.</p> <p>Copies of minutes of meetings, discussion notes or other documents may be sufficient to replace the personal statement.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 1.2 | Recommend a budget (including cost estimate, contingency and management reserve). | <p>An evaluation (presented in report format or similar) of a budget and sub budgets with costs, including a section on contingency and management reserve.</p> <p>There should be an explanation of the reasons for the recommended choice of budget either within the evaluation or through personal statement or assessor devised oral or written questions. Students should demonstrate they have considered at least 2 types of budget before making their choice, including behavioural aspects.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| 2 | Be able to manage costs against a budget. | 2.1 | Review actual expenditure against planned expenditure using cost control mechanisms. | <p>Copies of documents reviewing actual and planned expenditure using variance analysis, recommendations in relation to cost control and a reconciliation report.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.2 | Manage base costs for the project using cost control mechanisms. | <p>As a minimum students should provide evidence to cover one short term, one medium term and one long term example of managing base costs. This can be achieved by extending the evidence submitted to cover AC 2.1 or through a personal statement or assessor devised oral or written questions.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| | | 2.3 | Forecast when funds will need to be released for project activities using cost control mechanisms. | <p>Copies of documents showing when funds should be released and why, and including an analysis of the consequences of early or late release of funds and the effect on other budgets.</p> <p>Alternatively a personal statement and assessor devised written or oral questions can be provided instead of, or to enhance, the documents</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.4 | Anticipate where expenditure may exceed tolerances, and take the necessary steps to address the issue. | <p>Minutes of meetings or other documents showing what steps have been taken to address potential excess expenditure and evidence of a minimum of two forecasting techniques being used.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 2.5 | Analyse and report financial performance at the required intervals. | <p>Copy of a report analysing financial performance and making recommendations and evidence that analysis takes place at required intervals.</p> <p>Alternatively, copies of presentation slides which analyse performance and show conclusions.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| 3 | Be able to complete financial transactions and evaluate project costs. | 3.1 | Confirm that all financial liabilities relating to the project are accounted for on project completion. | <p>Records of working papers, correspondence with suppliers, customers, or stakeholders referring to financial liabilities.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.2 | Analyse the financial performance of the project at completion. | <p>Copies of documents analysing the financial performance of the project at completion, and including a minimum of 2 performance indicators, and a cost reconciliations report.</p> <p>Documents may include summary statements and copies of communication with senior management illustrating the analysis.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 3.3 | Report the financial performance of the project to stakeholders at completion. | <p>Copies of a formal report to stakeholders commenting on the performance indicators identified in AC 3.2 and the effectiveness of the project as a whole.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |

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| 4 | Be able to comply with standards of financial management. | 4.1 | Identify relevant standards applying to financial procedures within the project (including legal, organisational and professional standards). | <p>A personal statement or assessor-devised oral or written questions to show the student is aware of legal, organisational and professional standards which apply to financial procedures and that these have been addressed within the project.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |
| | | 4.2 | Operate the financial procedures in compliance with the relevant standards (including the legal, organisational and professional standards). | <p>Copies of documents, a personal statement or assessor devised oral or written questions to show the student is aware of relevant legal standards, e.g. copyright licences and trademark licences, organisational policy and professional standards.</p> <p>The student may produce evidence of prior achievement which demonstrates that this criterion has been met.</p> |