

Pearson Edexcel Level 3 NVQ Diploma in Marketing

Specification

NVQ/Competence-based qualification

For first registration September 2011

Issue 2

Edexcel, BTEC and LCCI qualifications

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This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

This qualification was previously known as:

Edexcel Level 3 NVQ Diploma in Marketing (QCF)

The QN remains the same.

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ISBN: 978 1 446 93993 2

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Summary of Pearson Edexcel Level 3 NVQ Diploma in Marketing specification Issue 2 changes

Summary of changes made between previous issue and this current issue	Page number
All references to QCF have been removed throughout the specification	
Definition of TQT added	3
Definition of sizes of qualifications aligned to TQT	3
Credit value range removed and replaced with lowest credit value for the shortest route through the qualification	5
TQT value added	5
GLH range removed and replaced with lowest GLH value for the shortest route through the qualification	5
QCF references removed from unit titles and unit levels in all units	15-189
Guided learning definition updated	11

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

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Qualification title covered by this specification

This specification gives you the information you need to offer the Pearson Edexcel Level 3 NVQ Diploma in Marketing:

Qualification title	Qualification Number (QN)	Accreditation start date
Pearson Edexcel Level 3 NVQ Diploma in Marketing	600/2850/6	01/09/2011

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding. The Qualification Number (QN) should be used by centres when they wish to seek public funding for their learners. Each unit within a qualification will also have a unit reference number.

The qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

Key features of the qualification

This qualification:

- is nationally recognised
- is based on the National Occupational Standards (NOS) for Marketing, owned by the standards setting body for the sector, the Council for Administration.

Apprenticeships

The Pearson Edexcel Level 3 NVQ Diploma in Marketing is a component of the Advanced Apprenticeship in Marketing.

Who is this qualification for?

This qualification is suitable for people working in a marketing role, either full time, part time or on a voluntary basis.

Typical roles might include people working as marketing coordinator, junior marketing executive/officer, advertising account executive or market researcher. They might be undertaking a range of activities which could include conducting market research, designing and evaluating marketing plans, contributing to advertising and promotional campaigns and events, maintaining a portfolio of products and managing budgets.

What is the aim of the qualification?

This qualification recognises a learner's ability to work competently in a marketing job role.

Who can register for the qualification?

This qualification is for all learners aged 16 and above who are capable of reaching the required standards.

Pearson's policy is that the qualification should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualification.

Sizes of NVQ/Competence-based qualifications

For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

NVQ/Competence-based qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

What are the benefits of this qualification to the learner and employer?

For learners, the benefits of this qualification are that it:

- allows them to develop skills that will be useful to them in their day-to-day job role
- confirms their occupational competence, thus enhancing their employability
- motivates them by giving the opportunity to gain a nationally-recognised level 3 qualification that demonstrates ongoing professional development.

For employers, the benefits of this qualification are that it:

- helps identify training needs by benchmarking best practice
- motivates staff to perform at a high standard, resulting in better customer satisfaction and improved staff retention
- allows for increased confidence in the performance of staff who have achieved the qualification.

What progression opportunities are available to learners who achieve this qualification?

Learners who have successfully completed this qualification can progress on to general management qualifications, such as the Edexcel Level 3 BTEC Award in Management

What is the qualification structure for the Pearson Edexcel Level 3 NVQ Diploma in Marketing?

Qualification TQT: 370; GLH (guided learning hours): 115.

The learner must achieve a total of 37 credits as follows:

- 13 credits must be achieved from mandatory Group A
- a minimum of 12 credits must be achieved from Optional Group B
- the remaining credits must be achieved from Optional Group B and/or Optional Group C. A maximum of 12 credits can be achieved from Optional Group C (of which no more than 4 credits can be at level 2).
- **where unit numbers contain an asterisk, a barred combination exists (please see the table on page 6 for more information).**

Unit	Unit reference	Unit title	Credit	Level
Mandatory Group A				
1	Y/502/9927	Analyse competitor activity	3	3
2	R/502/9957	Contribute to the development of a marketing plan	3	3
3	F/601/2520	Evaluate and improve own performance in a business environment	3	3
4	R/601/2523	Work with other people in a business environment	4	3
Optional Group B				
5	H/502/9929	Conduct market research	6	3
6	H/502/9932	Evaluate market research data	3	3
7	M/502/9934	Contribute to the preparation of a marketing strategy	6	4
8	A/502/9936	Contribute to the development of new products and/or services	4	4
9	T/502/9952	Maintain a portfolio of products and/or services	3	3
10	F/502/9954	Design marketing promotions	3	3
11	D/502/9959	Implement a marketing plan	4	3
12	R/502/9960	Evaluate the effectiveness of a marketing plan	4	3
13	Y/502/9961	Develop an advertising campaign	3	3

Unit	Unit reference	Unit title	Credit	Level
Optional Group B				
14	D/502/9962	Specify the design requirement for marketing databases	3	3
15	K/502/9964	Manage outsourced marketing supplier relationships	4	3
16	M/502/9965	Use digital technology for marketing purposes	5	3
17	R/502/9926	Use digital and social media in marketing campaigns	2	2
Optional Group C				
18	K/600/9661	Develop working relationships With colleagues and stakeholders	4	4
19	J/601/2549	Contribute to running a project	5	3
20	A/601/2547	Contribute to innovation in a business environment	4	3
21	M/601/2528	Develop a presentation	3	3
22	T/601/2529	Deliver a presentation	3	3
23	J/601/2552	Agree a budget	4	3
24	T/601/2580	Manage budgets	5	4
25	F/601/2565	Prepare specifications for contracts	5	4
26*	Y/601/2524	Contribute to decision-making in a business environment	3	3
27*	H/601/2560	Make decisions in a business environment	4	4
28	D/601/2525	Negotiate in a business environment	5	3
29*	R/601/2540	Plan and organise an event	4	3
30*	Y/601/2541	Co-ordinate an event	4	3
31	J/601/2566	Chair meetings	4	4
32	Y/600/9669	Plan, allocate and monitor work of a team	5	3
33*	M/502/4622	Presentation software	4	2
34*	T/502/4623	Presentation software	6	3
35*	F/502/4625	Spreadsheet software	4	2
36*	J/502/4626	Spreadsheet software	6	3

Unit	Unit reference	Unit title	Credit	Level
Optional Group C				
37*	F/502/4379	Using collaborative technologies	4	2
38*	T/502/4380	Using collaborative technologies	6	3
39*	R/502/4631	Website software	4	2
40*	Y/502/4632	Website software	5	3
41*	F/502/4396	Bespoke software	3	2
42*	J/502/4397	Bespoke software	4	3

Barred combinations

The following table shows barred combinations. A learner can achieve only **one** of each pair from columns A and B.

A		B
Unit 26: Contribute to decision making in a business environment	...is barred against...	Unit 27: Make decisions in a business environment
Unit 29: Plan and organise an event	...is barred against...	Unit 30: Co-ordinate an event
Unit 33: Presentation software	...is barred against...	Unit 34: Presentation software
Unit 35: Spreadsheet software	...is barred against...	Unit 36: Spreadsheet software
Unit 37: Using collaborative technologies	...is barred against...	Unit 38: Using collaborative technologies
Unit 39: Website software	...is barred against...	Unit 40: Website software
Unit 41: Bespoke software	...is barred against...	Unit 42: Bespoke software

How is the qualification graded and assessed?

The overall grade for the qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- show that the evidence is their own.

The qualifications are designed to be assessed:

- in the workplace, or
- in conditions resembling the workplace, where permitted by the assessment methodology for the sector (see *Annexe C*).

Evidence of competence may come from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a current job role as a result of a learning/training programme
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. It is important to note that RPL is only permitted where the evidence meets the requirements of the qualification assessment methodology in *Annexe C*.
- a **combination** of these.

It is important that the evidence is:

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the learner
Current	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
Reliable	indicates that the learner can consistently perform at this level
Sufficient	fully meets the requirements of the standards.

Assessment methodology

The assessment methodology for this qualification has been included in *Annexe C*. This includes details on:

- evidence requirements
- approaches to assessment
- acceptable types of evidence
- simulation
- criteria for the appointment of assessors
- criteria for the appointment of internal verifiers
- criteria for the appointment of standards verifiers.

Types of evidence (to be read in conjunction with the assessment methodology in *Annexe C*)

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment methodology for information about which of the following are permissible.

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, where permitted by the assessment methodology (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EWT)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Pearson standards verifier. A range of recording documents is available on the Pearson website qualifications.pearson.com. Alternatively, centres may develop their own.

Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Pearson approval are able to gain qualification approval for a different level or different sector via Edexcel online.

Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Pearson will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

Quality assurance

Detailed information on Pearson's quality assurance processes is given in *Annexe A*.

What resources are required?

Physical resources need to support the delivery of the qualification and the assessment of the learning outcomes and must be of industry standard. Staff assessing the learner must meet the requirements within the assessment methodology for the sector.

Unit format

Each unit in this specification contains the following sections.

Unit title:					This is the formal title of the unit that will appear on the learner's certificate
Unit reference number:					This code is a unique reference number for the unit.
Level:					Level All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors by Ofqual, the qualifications regulator.
Credit value:					All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.
Guided learning hours:					Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.
Unit summary:					This provides a summary of the purpose of the unit.
Evidence requirements:					Learners must provide evidence for each of the requirements stated in this section.
Recording of evidence:					Details how evidence can be recorded.
Learning outcomes:	Assessment criteria:	Evidence type:	Portfolio reference:	Date:	
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.	
Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.		The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.		Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.	

Units

Unit 1: Analyse competitor activity

Unit reference number: Y/502/9927

Level: 3

Credit value: 3

Guided learning hours: 3

Unit summary

This unit is about being able to identify competitor activity and determining the nature of the threat posed by competitors.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to identify competitor activity	1.1	Identify organisations competing for the same customers		
		1.2	Identify potentially threatening competitor activity		
		1.3	Identify competitors' objectives		
		1.4	Identify valid sources of information on competitors and their activity		
		1.5	Explain the advantages and disadvantages of sources of information on competitors and their activity		
2	Be able to determine the nature of the threat posed by competitor activity	2.1	Assess the strengths and weaknesses of competitor activity against agreed criteria		
		2.2	Assess the strengths and weaknesses of competitors' products and/or services against agreed criteria		
		2.3	Determine the nature and extent of the possible threat posed by competitor activity and products and/or services		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to contribute to the development of a marketing plan	1.1 Identify the objectives to be achieved by the marketing plan			
		1.2 Identify the characteristics of the target market(s)			
		1.3 Evaluate the different methods of achieving the marketing objectives			
		1.4 Specify methods, actions, resources, timescales, milestones, budget and success criteria			
		1.5 Use feedback from stakeholders to enhance the marketing plan			
		1.6 Gain commitment for the marketing plan from stakeholders			
		1.7 Establish monitoring procedures that are capable of generating evaluative information			
2	Understand the principles underpinning the development of marketing plans	2.1 Explain the role of the marketing plan in achieving the overall marketing strategy			
		2.2 Explain the advantages and disadvantages of different methods of achieving the marketing objectives			
		2.3 Explain the importance of customer segmentation in the development of a marketing plan			
		2.4 Explain the roles and responsibilities of other marketing-related functions			
		2.5 Explain the legal, regulatory, social and ethical issues relevant to marketing plans			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 3: Evaluate and improve own performance in a business environment

Unit reference number: F/601/2520

Level: 3

Credit value: 3

Guided learning hours: 22

Unit summary

This unit is about evaluating and improving own performance in the workplace.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to evaluate and improve own performance	1.1	Explain the purpose and benefits of continuously improving own performance in a business environment		
		1.2	Explain the purpose and value of encouraging and accepting feedback from others		
		1.3	Describe ways of evaluating own work		
		1.4	Explain the purpose and benefits of trying out possible improvements to own work		
		1.5	Evaluate how learning and development can improve own work, benefit organisations, and further own career		
		1.6	Compare possible career progression routes		
		1.7	Describe possible development opportunities		
		1.8	Justify the value of developing a learning plan		
2	Be able to evaluate and improve own performance using feedback from others	2.1	Encourage and accept feedback from other people		
		2.2	Evaluate own work and use feedback from others to identify areas for improvement		
		2.3	Identify changes in ways of working needed to improve work performance		
		2.4	Complete work tasks using changed ways of working		
		2.5	Evaluate work completed and changed ways of working for improvements and effectiveness		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to use evaluation of own performance to agree, develop and use a learning plan	3.1 Evaluate own performance and identify where further learning and development will improve own work			
	3.2 Agree and develop a learning plan to improve own work performance, that meets own needs			
	3.3 Follow a learning plan for improvement to own work			
	3.4 Review progress against learning plan and make updates for improving own work and further learning			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 4: Work with other people in a business environment

Unit reference number: R/601/2523

Level: 3

Credit value: 4

Guided learning hours: 12

Unit summary

This unit is about working with other people in a way that achieves agreed goals and objectives for the organisation and the team.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to support an organisation's overall mission and purpose	1.1	Explain how the organisation works		
		1.2	Explain the organisation's mission and purpose		
		1.3	Compare how the organisation works with other different types of organisations		
		1.4	Explain your main responsibilities, how these fit into the organisation's structure, and how these contribute to achieving your organisation's mission		
		1.5	Define policies, procedures, systems and values of your organisation relevant to your role		
		1.6	Describe when it is appropriate to seek guidance from others when unsure about objectives, policies, systems procedures and values		
2	Understand how to work as a team to achieve goals and objectives	2.1	Explain the purpose and benefits of working with other people to achieve agreed goals and objectives		
		2.2	Describe situations in which working with others can achieve positive results		
		2.3	Explain the purpose and benefits of sharing work goals and plans when working with others		
		2.4	Describe situations in which team members might need support		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
		2.5 Explain different ways of providing support to teams			
		2.6 Explain the purpose and benefits of agreeing quality measures within a team			
3	Understand how to communicate as a team	3.1 Explain when it is essential to communicate with the people working within a team			
		3.2 Compare and contrast different methods of communication and when to use them			
		3.3 Explain the benefits of effective communication within a team			
4	Understand the contribution of individuals within a team	4.1 Explain the purpose and benefits of acknowledging the strengths of others			
		4.2 Explain the purpose and benefits of respecting individuals working within a team			
5	Understand how to deal with problems and disagreements	5.1 Explain the types of problems and disagreements that may occur when working with others			
		5.2 Evaluate ways of resolving problems and disagreements when working with others			
6	Understand the purpose of feedback when working as a team	6.1 Explain the purpose and benefits of giving and receiving constructive feedback			
		6.2 Explain ways of using feedback to improve individual work, the work of others and a team as a whole			

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

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
8	Be able to deal with problems in a team	8.1 Identify problem(s) or disagreement(s) in a team			
		8.2 Resolve problem(s) or disagreement(s), referring if required			
9	Be able to share feedback on objectives in a team	9.1 Share constructive feedback on achievement of objectives with a team			
		9.2 Receive constructive feedback on own work			
		9.3 Share feedback on achievement of objectives to identify improvements in own work, and that of the team			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 5: Conduct market research

Unit reference number: H/502/9929

Level: 3

Credit value: 6

Guided learning hours: 10

Unit summary

This unit is about identifying the need for market research, designing market research projects and being able to manage market research data collection.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to identify the need for market research	1.1	Establish the nature of the marketing issue for which information is needed		
		1.2	Agree the research budget and timescale		
		1.3	Agree specific, measurable, realistic and time-bound objectives		
2	Be able to design market research projects	2.1	Determine the research method(s) and instrument(s) best suited to obtaining the required information within budget		
		2.2	Establish the sources of reliable quantitative and qualitative information most likely to yield the required information		
		2.3	Develop a research project proposal and rationale that addresses the research objectives		
		2.4	Obtain approval to the specified actions, responsibilities, timescales and budget for the research		
		2.5	Explain the strengths and limitations of the ranges of proposed research methods		
		2.6	Explain the use of a sample in designing market research projects		
		2.7	Explain the importance of validating information		

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

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

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(if sampled)

Unit 6: Evaluate market research data

Unit reference number: H/502/9932

Level: 3

Credit value: 3

Guided learning hours: 12

Unit summary

This unit is about being able to plan, carry out and report on the evaluation of market research data.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to plan the evaluation of market research data	1.1 Develop an evaluation plan that specifies the purpose, scope, objectives, budget, success criteria, format and timescale			
	1.2 Identify methods, tools and techniques that are suitable for the evaluation and capable of delivering the required analysis within the timescale and budget			
	1.3 Obtain the resources needed to carry out the evaluation			
	1.4 Agree evaluation protocols and procedures with those commissioning research			
2 Be able to evaluate market research data	2.1 Use agreed methods, tools and techniques in accordance with the evaluation plan			
	2.2 Validate the data against agreed criteria			
	2.3 Involve agreed research participants and stakeholders in accordance with the evaluation plan			
	2.4 Identify issues, trends, themes, linkages and interdependencies from an analysis of the market research data			
	2.5 Confirm the reliability and validity of the evaluation findings through comparative studies (against historical data and norms)			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.6 Justify evaluation conclusions and recommendations with evidence			
	2.7 Explain the advantages and disadvantages of a range of analytical methods, tools and techniques			
	2.8 Explain how to resolve errors, inconsistencies, gaps and anomalies in market research data			
	2.9 Explain the importance of reliability, validity and statistical confidence to the evaluation			
3 Be able to report on the evaluation of market research data	3.1 Record the evaluation findings in a way that facilitates access, data manipulation and reporting			
	3.2 Present the evaluation findings in the agreed format within the agreed timescale and budget			
	3.3 Explain the implications of the evaluation findings to those commissioning the research in a way that they will understand			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

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Internal verifier signature: _____

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(if sampled)

Unit 7: Contribute to the preparation of a marketing strategy

Unit reference number: M/502/9934

Level: 4

Credit value: 6

Guided learning hours: 25

Unit summary

This unit is about identifying trends and behaviour patterns in a target market, and about contributing to the development of a marketing strategy.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

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

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

Learner name: _____

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Assessor signature: _____

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(if sampled)

Unit 8: Contribute to the development of new products and/or services

Unit reference number: A/502/9936

Level: 4

Credit value: 4

Guided learning hours: 16

Unit summary

This unit is about assessing marketing opportunities, and establishing requirements, for new products and/or services.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to contribute to the assessment of marketing opportunities for new products and/or services	1.1	Identify opportunities from an analysis against agreed criteria, using tools that are appropriate for the task		
		1.2	Establish target customers' perception and likely use(s) of the product and/or service		
		1.3	Assess the likely impact of customers' culture and behaviours on potential sales		
		1.4	Identify the nature of potential threats posed by competitors		
		1.5	Describe political, economic, social, technological and legal factors to be taken into account when assessing marketing opportunities for new products and/or services		
		1.6	Explain the advantages and disadvantages of a range of tools to identify market opportunities and threats		
2	Be able to establish requirements for new products and/or services	2.1	Specify how the proposed products and/or services align with the marketing strategy		
		2.2	Justify the recommendation to develop new products and/or services		
		2.3	Propose market test plans for products and/or services that contain specified actions, timescales, resource requirements and evaluation criteria		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.4 Explain how to distinguish between product ideas, concepts and image and the stages of development			
	2.5 Explain how the power of a brand influences demand for new products and/or services			
	2.6 Explain the advantages and disadvantages of different forms of market testing			
	2.7 Describe sources for the generation of ideas for new products and/or services			
	2.8 Explain the implications of competitor activity on the development of proposed new products and/or services			
	2.9 Explain how to price new products and/or services			
	2.10 Explain the advantages and disadvantages of different forecasting methods			

Learner name: _____

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(if sampled)

Unit 9: Maintain a portfolio of products and/or services

Unit reference number: T/502/9952

Level: 3

Credit value: 3

Guided learning hours: 17

Unit summary

This unit is about developing and maintaining a portfolio of products and/or services, including understanding the principles underpinning portfolio maintenance.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to develop and maintain a portfolio of products and/or services	1.1 Identify the market position of each product and/or service			
	1.2 Assess the market share of each product and/or service			
	1.3 Forecast likely sales growth and market share growth for each product and/or service			
	1.4 Establish how changes in sales and market share might be affected by different development strategies			
	1.5 Prioritise the fit of products and/or services within the overall marketing strategy			
	1.6 Recommend building market share, holding share, harvesting or divesting of each product and/or service based on an analysis of their likely profitability			
	1.7 Agree the options, actions and budget for development/maintenance in accordance with the marketing strategy			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand the principles underpinning portfolio maintenance	2.1 Explain the importance of portfolio planning to the achievement of the marketing strategy			
	2.2 Explain the use of techniques for classifying different levels of performance of products and/or services			
	2.3 Describe the factors to be taken into account when assessing the performance of products and/or services			
	2.4 Explain the advantages and disadvantages of different forecasting techniques			

Learner name: _____

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(if sampled)

Unit 10: Design marketing promotions

Unit reference number: F/502/9954

Level: 3

Credit value: 3

Guided learning hours: 10

Unit summary

This unit is about identifying the need for, and then designing, marketing promotions.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to identify the nature of need for marketing promotions	1.1 Justify recommendations on an analysis of sales performance, market factors, buyer and competitor activity			
	1.2 Determine the affordability of a marketing promotion			
	1.3 Assess the likely impact of the proposed marketing promotions on demand			
	1.4 Identify the implications of marketing promotions for other products and/or services			
	1.5 Develop contingencies to address identified risks associated with marketing promotions			
	1.6 Set realistic and achievable marketing promotion targets in accordance with the marketing plan			
	1.7 Describe how to carry out a cost-benefit analysis and establish profitability levels			
	1.8 Describe the level of returns on investments needed for products and/or services			

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

Learner name: _____

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(if sampled)

Unit 11: Implement a marketing plan

Unit reference number: D/502/9959

Level: 3

Credit value: 4

Guided learning hours: 5

Unit summary

This unit is about preparing for, and then implementing, marketing plans.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to prepare for the implementation of marketing plans	1.1 Develop an implementation plan that specifies objectives, actions, responsibilities, budget, timescale and success criteria			
	1.2 Brief personnel on their roles and responsibilities in accordance with the marketing plan			
	1.3 Ensure the availability of agreed marketing resources			
	1.4 Explain the importance of understanding the nature of the market in which the activity is being targeted			
2 Be able to implement marketing plans	2.1 Deliver the requirements of the plan within budget and timescale			
	2.2 Address risks, problems and variances from expectations in accordance with the marketing plan			
	2.3 Keep stakeholders up to date with progress, developments and issues			
	2.4 Record and report on the outcomes of the implementation in accordance with the marketing plan and organisational procedures			
	2.5 Explain the importance of the marketing activity to the success of the marketing strategy			

Learner name: _____

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(if sampled)

Unit 12: Evaluate the effectiveness of a marketing plan

Unit reference number: R/502/9960

Level: 3

Credit value: 4

Guided learning hours: 10

Unit summary

This unit is about planning and carrying out the evaluation of a marketing plan.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to plan the evaluation of marketing activities	1.1	Establish an evaluation framework which incorporates: a baseline; realistic and achievable objectives; key performance indicators and success criteria; process and impact evaluation mechanisms; feedback and communication mechanisms and mechanisms for calculating return on investment		
		1.2	Agree evaluation resources with stakeholders		
		1.3	Gain stakeholders' agreement to the methods, tools and techniques that are most suited to carry out the evaluation		
2	Be able to evaluate the effectiveness of the marketing plan	2.1	Use agreed methods to evaluate quantitative and qualitative data against agreed success criteria		
		2.2	Assess the impact of the marketing plan against agreed criteria		
		2.3	Identify the reasons for variances in performance from expectations		
		2.4	Recommend actions to address possible variances in accordance with the marketing plan		
		2.5	Evaluate the quality, cost-effectiveness and cost-efficiency of the marketing activity against agreed criteria		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.6 Report on the findings of the evaluation in the agreed format			
	2.7 Use evaluation results to inform future strategic planning			
	2.8 Explain the importance of evaluating marketing activities			
	2.9 Explain the advantages and disadvantages of a range of evaluation methods			

Learner name: _____

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(if sampled)

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to generate creative advertising options	1.1 Develop concepts that: dramatise the agreed creative strategy; appeal to target customers; are distinctive and memorable; are ethical and sustainable and which differentiate the products and/or services from those of competitors			
	1.2 Ensure that the style, tone, words and format combine coherently			
	1.3 Prepare visualisations that illustrate proposed ideas in accordance with organisational procedures			
	1.4 Present creative proposals to stakeholders in the agreed format			
	1.5 Obtain stakeholders' agreement for the preferred option to proceed			
	1.6 Explain the role of advertising within the customer's overall marketing strategy			
	1.7 Explain the roles of those involved in the advertising creative and production processes			
	1.8 Explain how intellectual property rights might affect advertising campaigns			
2 Be able to manage the implementation of advertising activities	2.1 Evaluate the suitability and cost-effectiveness of a range of media vehicles for the campaign			
	2.2 Agree the schedule and pattern of advertising in accordance with agreed objectives			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.3 Agree the media type(s), vehicles and schedule in accordance with agreed objectives			
	2.4 Forecast anticipated response outcomes from advertising activities from an analysis of the target groups			
	2.5 Agree response mechanisms that can be handled within resource constraints			
	2.6 Agree monitoring processes that are capable of ensuring that the media schedule has been delivered			
	2.7 Explain the importance of reach, frequency and impact in achieving advertising objectives			
	2.8 Explain the role of each advertising medium in a consumer's life			

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(if sampled)

Unit 14: Specify the design requirement for marketing databases

Unit reference number: D/502/9962

Level: 3

Credit value: 3

Guided learning hours: 12

Unit summary

This unit is about identifying the requirements for marketing databases and then specifying their capabilities.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

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Learning outcomes and assessment criteria

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

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

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(if sampled)

Unit 15: Manage outsourced marketing supplier relationships

Unit reference number: K/502/9964

Level: 3

Credit value: 4

Guided learning hours: 12

Unit summary

This unit is about planning and monitoring work carried out by outsourced suppliers of marketing services.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

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

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

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(if sampled)

Unit 16: Use digital technology for marketing purposes

Unit reference number: M/502/9965

Level: 3

Credit value: 5

Guided learning hours: 15

Unit summary

This unit is about using digital technology for marketing. This includes using technology for market research, to create digital tools and messages, and for social media purposes.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to use digital tools for marketing purposes	1.1	Create digital marketing publicity that optimises the use of search engines		
		1.2	Evaluate the cost-effective use of pay-per-click (PPC) facilities		
		1.3	Ensure the consistency and relevance of meta tags to the marketing message		
		1.4	Ensure that website content is keyword-rich		
		1.5	Use offsite search engine optimisation (SEO) in a way that meets the marketing strategy		
		1.6	Explain the use of response systems in SEO activities		
		1.7	Explain the importance of a keyword strategy		
		1.8	Explain the benefits and risks of a link strategy		
2	Be able to carry out marketing research using the internet	2.1	Adapt and use browser facilities and search engines to identify required marketing information		
		2.2	Mine and extract marketing data using multiple selection criteria in accordance with the research specification		
		2.3	Identify marketing trends, patterns and opportunities from multiple-table relational databases		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.4 Explain the strengths and weaknesses of a range of tools and techniques to search the internet			
	2.5 Describe different ways of saving marketing information and sources of marketing information			
	2.6 Explain how intellectual property rights affect the use of marketing information downloaded from the internet			
3 Be able to create digital marketing devices and messages	3.1 Specify a customer relationship management (CRM) system that is capable of identifying customer buying preferences and patterns			
	3.2 Create a range of digital marketing devices that are targeted on identified market segments			
	3.3 Create response systems appropriate for each marketing device			
	3.4 Use tracking systems that are capable of adding value to marketing information databases			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to use digital technology for social media marketing purposes	4.1 Use CRM system to identify target customers			
	4.2 Use the digital medium that is most appropriate for the marketing message to be conveyed			
	4.3 Adopt writing and visual styles that are best suited to the chosen digital marketing medium			
	4.4 Integrate the use of multiple digital tools and devices to optimise their marketing potential			
	4.5 Present non-standard marketing reports and recommendations that are supported by statistical evidence			
	4.6 Explain the strengths and weaknesses of a range of digital technologies for marketing purposes			
	4.7 Explain the precautions used to prevent marketing messages being identified as "spam"			
	4.8 Explain the structure of social networking sites			
	4.9 Explain techniques for increasing hits on social networking sites			

Learner name: _____

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(if sampled)

Unit 17: Use digital and social media in marketing campaigns

Unit reference number: R/502/9926

Level: 2

Credit value: 2

Guided learning hours: 7

Unit summary

This unit is about understanding planning requirements for the use of digital and social media, and about marketing to target customers using digital and social media.

Relationship with National Occupational Standards

This unit is based on the NOS for Marketing, owned by the Council for Administration.

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand planning requirements for the use of digital and social media	1.1	Describe the importance of the objectives and budget for digital and social media marketing aligning with the marketing plan		
		1.2	Describe how to identify the nature and location of target customers		
		1.3	Describe sources of information about the nature and location of target customer groups		
		1.4	Explain the implications of retention and acquisition programmes as they affect the choice of digital/social media		
		1.5	Explain how to reach target customers in accordance with the plan		
		1.6	Explain the requirements of a data collection and reporting system that is capable of capturing the information required by the plan		
		1.7	Explain the importance of agreeing the message that conveys the marketing proposition		
2	Be able to market to target customers using digital and social media	2.1	Ensure marketing messages are distributed in accordance with the plan		
		2.2	Ensure that digital/social media marketing is conducted in accordance with legal, regulatory and industry requirements and standards		
		2.3	Explain how to address problems in accordance with the plan		

Learner name: _____

Date: _____

Learner signature: _____

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Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 18: Develop working relationships with colleagues and stakeholders

Unit reference number: K/600/9661

Level: 4

Credit value: 4

Guided learning hours: 20

Unit summary

This unit will help learners to develop effective working relationships with colleagues and stakeholders.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Management and Team Leading, owned by the Council for Administration. This unit can also be found in other qualifications, for example:

- Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 3 NVQ Certificate in Management
- Pearson Edexcel Level 4 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Know how to identify stakeholders and their relevance to an organisation	1.1	Identify an organisation's stakeholders		
		1.2	Evaluate the roles, responsibilities, interests and concerns of stakeholders		
		1.3	Assess the importance of identified stakeholders		
2	Understand how to establish working relationships with colleagues and stakeholders	2.1	Clarify how to agree a common sense of purpose with colleagues and stakeholders		
		2.2	Summarise how to create an environment of trust and mutual respect with colleagues and stakeholders		
3	Be able to create an environment of trust and mutual respect with colleagues and stakeholders	3.1	Review and revise the needs and motivations of colleagues and stakeholders		
		3.2	Demonstrate interaction with colleagues and stakeholders that allows respect for the views and actions of others		

Learner name: _____

Date: _____

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(if sampled)

Unit 19: Contribute to running a project

Unit reference number: J/601/2549

Level: 3

Credit value: 5

Guided learning hours: 30

Unit summary

This unit is about contributing to the planning, running and evaluation of a project.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example:

- Pearson Edexcel Level 2 NVQ Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 4 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to contribute to a project	2.1 Describe the types of information needed to monitor projects and the methods that can be used to give information			
	2.2 Describe how to estimate and control resources in an area of work during a project			
	2.3 Explain the purpose of reporting own progress during a project			
	2.4 Outline reasons for seeking advice in response to unexpected events			
	2.5 Explain the purpose and benefits of contributing towards achieving projects within agreed timescales			
	2.6 Explain the purpose and benefits of keeping records of all project activity within the scope of own work			
	2.7 Describe different ways of communicating with those involved in or affected by a project to make sure it runs smoothly			
3 Understand the purpose of contributing to the evaluation of a project	3.1 Describe different types of methods available to monitor projects			
	3.2 Explain the purpose of making own contributions when evaluating projects			
	3.3 Describe how to learn lessons for the future for own work			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to contribute to preparing and planning a project	4.1 Confirm the purpose of the project with all stakeholders			
	4.2 Confirm project scope, timescale, aims and objectives			
	4.3 Contribute to the preparation of a project specification			
	4.4 Confirm all types of resources for all stakeholders			
	4.5 Confirm with all stakeholders, the project plan and timed use of all types of resources for an area of work			
	4.6 Contribute to identifying risks and develop contingency plans for an area of work			
5 Be able to contribute to running a project	5.1 Implement a project			
	5.2 Communicate with all stakeholders involved with or affected by a project			
	5.3 Adapt project plans for stakeholders to respond to unexpected events and risks			
	5.4 Provide interim reports on project progress to relevant stakeholders			
	5.5 Achieve required outcomes for relevant stakeholders on time and to budget			
	5.6 Seek advice in response to unexpected events, if required			
	5.7 Keep records of project activity			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Be able to contribute to evaluating the outcomes of a project	6.1 Evaluate project for all stakeholders			
	6.2 Report on the degree to which a project met its aims and objectives for all stakeholders			
	6.3 Report on project strengths and areas for improvement for all stakeholders			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose and benefits of innovation in a business environment	1.1	Explain the purpose of innovation as a way of staying competitive and offering new solutions		
		1.2	Explain the purpose of questioning existing ways of working in own area of work and assumptions about them		
2	Understand how to contribute to research, develop and review ideas for new approaches and solutions	2.1	Explain the purpose of reviewing existing working methods, products or services		
		2.2	Explain ways of reviewing existing working methods, products or services		
		2.3	Identify sources of information for new approaches and solutions		
		2.4	Describe ways of collecting information on possible improvements		
		2.5	Explain the purpose of working with others when developing new approaches and solutions		
		2.6	Explain the benefits of working with others when agreeing how to present ideas to decision-makers, and ways of doing so		
		2.7	Explain how to work with others to develop and agree an idea		
		2.8	Explain how to decide when an idea is, or is not possible		
		2.9	Explain the purpose of reviewing and learning from mistakes		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Understand how to present suggestions for new approaches and solutions	3.1	Explain the purpose of selling ideas to decision-makers		
		3.2	Describe how to present and sell suggestions for new approaches and solutions to decision-makers to achieve a positive outcome		
4	Be able to contribute to research and develop ideas	4.1	Question constructively existing ways of working in own area of responsibility		
		4.2	Contribute to researching and identifying possible improvements to working methods, products or services in own area of responsibility		
		4.3	Contribute to the collection of information that can be used to develop ideas for new approaches and solutions		
		4.4	Agree criteria for evaluating ideas including fit with organisational aims and objectives		
5	Be able to present suggestion for new approaches and solutions	5.1	Present and sell suggestions for new approaches and/or solutions		
		5.2	Communicate risks to others in a suitable format		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Be able to evaluate, review and make suggestions for new approaches and solutions	6.1 Contribute to the evaluation of ideas for new approaches and solutions using a) fit with organisational aims and objectives b) other agreed criteria			
	6.2 Evaluate ideas to challenge own assumptions and thinking about ways of working, products or services			
	6.3 Contribute to the selling of ideas to others			
	6.4 Seek feedback on ideas, analyse feedback. and show a willingness to compromise			
	6.5 Contribute to the assessment of idea(s) and decide whether a suggestion for a new approach/ solution is possible			

Learner name: _____

Date: _____

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Assessor signature: _____

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(if sampled)

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the purpose of preparing for and evaluating a presentation	1.1 Explain the purpose of using different types of presentation and equipment to provide information			
	1.2 Explain the procedures to be followed when preparing a presentation, including planning, preparation of content, materials, and contingencies			
	1.3 Explain the benefits of preparing for giving a presentation			
	1.4 Explain and illustrate how presentations may be enhanced by materials and equipment			
	1.5 Explain the purpose and benefits of reflecting on the feedback obtained of the written presentation			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to develop a presentation	2.1 Agree and confirm audience, purpose, content, style and timing of a presentation			
	2.2 Research and plan a presentation			
	2.3 Select any equipment needed for the presentation			
	2.4 Prepare content, shape and structure of a presentation to achieve its purpose and suit needs of audience			
	2.5 Obtain feedback on planned presentation and make adjustments, if required			
	2.6 Produce presentation handouts			
	2.7 Collect feedback on the written presentation			
	2.8 Reflect on the feedback obtained on the written presentation and identify learning points			
	2.9 Identify changes that will improve future written presentations			

Learner name: _____

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(if sampled)

Unit 22: Deliver a presentation

Unit reference number: T/601/2529

Level: 3

Credit value: 3

Guided learning hours: 15

Unit summary

This unit covers the skills, knowledge and understanding learners need to prepare for, deliver and evaluate a presentation for an audience.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example:

- Pearson Edexcel Level 2 NVQ Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 4 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose of preparing for and evaluating a presentation	1.1	Explain the purpose of using different types of presentation and equipment		
		1.2	Explain different ways of delivering presentations and their features		
		1.3	Explain the procedures to be followed when preparing a presentation		
		1.4	Explain the benefits of preparing for giving a presentation		
		1.5	Describe the types of problems that may occur with equipment and how to deal with them		
		1.6	Explain the purpose and benefits of contingency planning		
		1.7	Explain the purpose and benefits of collecting feedback from the audience on the presentation		
		1.8	Explain the purpose and benefits of evaluating presentations and own performance		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Understand the techniques used in enhancing a presentation	2.1	Explain and illustrate how presentations may be enhanced by materials and equipment		
		2.2	Explain and illustrate how presentations may be enhanced by use of communication and interpersonal skills		
		2.3	Describe how to gauge audience reaction to the presentation		
		2.4	Explain the purpose and benefits of summarising important features of the presentation		
		2.5	Describe the purpose and benefits of giving the audience opportunities to ask questions		
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		
		3.2	Make contingency plans in case of equipment failure or other problems, if required		
		3.3	Practise the presentation and its timing		
		3.4	Obtain feedback on planned presentation and make adjustments, if required		

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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to evaluate a presentation	5.1 Collect feedback on the presentation			
	5.2 Reflect on own performance and identify learning points			
	5.3 Evaluate the presentation and own performance and identify changes that will improve future presentations			

Learner name: _____

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(if sampled)

Unit 23: Agree a budget

Unit reference number: J/601/2552

Level: 3

Credit value: 4

Guided learning hours: 25

Unit summary

This unit is about developing and agreeing a budget for a department or section within a business.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example:

- Pearson Edexcel Level 2 NVQ Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 4 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to develop budgets	1.1 Explain how to use estimations when developing a draft budget			
	1.2 Explain how to identify priorities and financial resources needed when preparing a budget			
	1.3 Explain the purpose and benefits of identifying priorities when preparing a budget			
	1.4 Explain the purpose and benefits of evaluating and justifying estimated costs and income			
	1.5 Describe procedures for negotiating superseded budgets			
	1.6 Describe skills needed for agreeing budgets			
2 Be able to agree a budget	2.1 Identify financial resources needed to achieve goals and objectives for agreeing a budget			
	2.2 Evaluate and justify costs and risks			
	2.3 Prepare a draft budget			
	2.4 Negotiate and agree a budget			

Learner name: _____

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(if sampled)

Unit 24: Manage budgets

Unit reference number: T/601/2580

Level: 4

Credit value: 5

Guided learning hours: 29

Unit summary

This unit is about managing and monitoring a budget for a department or section within an organisation.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example:

- Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 4 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the purpose of budgets	1.1 Explain the purpose and benefits of managing financial resources effectively and efficiently			
	1.2 Identify legal, regulatory and organisational requirements for managing a budget			
	1.3 Describe different types of budgetary systems and their features			
2 Understand how to manage budgets	2.1 Describe methods for monitoring, controlling and recording income and expenditure			
	2.2 Describe ways in which costs may be minimised in own area of responsibility			
	2.3 Identify situations in which corrective action may be needed			
	2.4 Describe the scope of own authority for managing a budget and authorising expenditure			
3 Understand how to report performance against budgets	3.1 Explain the purpose and benefits of reporting information on performance against budget			
	3.2 Explain how to check the accuracy of budget calculations			
	3.3 Explain the purpose and benefits of recording information that will help with the future preparation of budgets			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to manage budgets	4.1 Control budget performance within limits and deadlines			
	4.2 Analyse and take action to minimise costs where possible			
	4.3 Take corrective action to make sure of best value for money			
	4.4 Authorise expenditure within the scope of own authority			
5 Be able to monitor budgets	5.1 Record transactions, as required			
	5.2 Produce information on performance against budget, when required			
	5.3 Make sure all calculations are accurate			
	5.4 Record information that will help with the preparation of future budgets			

Learner name: _____

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(if sampled)

Unit 25: Prepare specifications for contracts

Unit reference number: F/601/2565

Level: 4

Credit value: 5

Guided learning hours: 30

Unit summary

This unit is about understanding and preparing the information that is needed to award a contract for work.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example Pearson Edexcel Level 4 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand work contracts	1.1	Explain the purpose and benefits of contracts and other forms of agreement		
		1.2	Describe different types of contracts and agreements		
		1.3	Evaluate different types of contract and agreement for their intended purpose		
		1.4	Explain the purpose of legal, regulatory and organisational requirements that may govern contracts		
		1.5	Identify a range of terminology used in contracts and explain its purpose		
		1.6	Explain the purpose and benefits of requirements and specifications in contracts		
2	Understand how to prepare for selection	2.1	Explain the purpose and benefits of prioritising requirements		
		2.2	Explain the purpose and value of developing objective selection criteria		
3	Be able to prepare specifications for work	3.1	Identify requirements for contractor(s), consulting with others where required		
		3.2	Prioritise requirements and prepare specifications for the products and services to be provided, consulting with others where required		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to agree selection criteria	4.1 Prepare selection criteria			
	4.2 Agree selection criteria, where required			

Learner name: _____

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Learner signature: _____

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Assessor signature: _____

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Date: _____

(if sampled)

Unit 26: Contribute to decision-making in a business environment

Unit reference number: Y/601/2524

Level: 3

Credit value: 3

Guided learning hours: 12

Unit summary

This unit is about contributing to the decision-making process made in a business environment.

Barred combinations

This unit cannot be taken with *Unit 27: Make decisions in a business environment* (H/601/2560).

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose and process of decision-making	1.1	Identify situations where decision-making is required		
		1.2	Explain key stages in the decision-making process		
2	Understand how to prepare to contribute to decision-making	2.1	Understand the purpose of knowing the context in which a decision is being made		
		2.2	Describe the role and responsibilities of a person contributing to decision-making		
		2.3	Describe possible limitations on a person contributing to decision-making		
		2.4	Identify sources of information that can be used to inform decision-making		
		2.5	Explain how to research information to be used to inform decision-making		
3	Understand how to contribute to decision-making	3.1	Explain the purpose of contributing to meetings and other discussions where decisions are being made, and ways of doing so		
		3.2	Explain how to structure own ideas and information		
		3.3	Explain the purpose and benefits of respecting other people's contributions to the decision-making process		
		3.4	Explain the purpose of listening and responding to other people during the decision-making process, and ways of doing so		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.5 Explain how to use evidence, argument, questioning and assertiveness to influence outcomes			
	3.6 Explain the purpose of collective responsibility			
4 Be able to prepare contributions to decision-making	4.1 Identify sources of information needed			
	4.2 Research and collect information to add value to the decision-making process			
5 Be able to make contributions to decision-making	5.1 Present information to others and develop ideas, using accurate and current information			
	5.2 Make constructive, relevant and timely contributions to meeting(s) or other discussions to contribute to making a decision			
	5.3 Provide additional information, when asked, to contribute to making a decision			
	5.4 Contribute to identifying and agreeing criteria for making a decision			
	5.5 Contribute to structuring ideas and information in a way that helps other people understand own ideas			
	5.6 Listen to other people's contributions adapting own ideas as necessary			
	5.7 Contribute to reviewing information provided for a decision to be made			
5.8 Confirm support for an agreed decision				

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

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Date: _____

(if sampled)

Unit 27: Make decisions in a business environment

Unit reference number: H/601/2560

Level: 4

Credit value: 4

Guided learning hours: 24

Unit summary

This unit is about making decisions in a business environment at the level where there is no requirement for formal legal or organisational procedures to be followed.

Barred combinations

This unit cannot be taken with *Unit 26: Contribute to decision-making in a business environment (Y/601/2524)*.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example Pearson Edexcel Level 4 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose and process of decision-making	1.1	Evaluate situations where decision-making is required		
		1.2	Explain key stages in the decision-making process		
2	Understand how to prepare to make decisions	2.1	Explain the purpose of knowing the context in which a decision is being made		
		2.2	Justify possible limitations on a person making decisions		
		2.3	Explain how to research information to be used to inform and influence decision-making		
		2.4	Evaluate sources of information that can be used to inform and influence decision-making		
3	Understand how to make decisions	3.1	Explain the purpose of meetings and other discussions where decisions are being made		
		3.2	Explain how to structure own ideas, information and recommendations to maximise their effectiveness		
		3.3	Explain the purpose and benefits of respecting other people's contributions to the decision-making process		
		3.4	Explain how to be proactive and engage with colleagues during the decision-making process		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.5 Justify the use of evidence, argument, questioning and assertiveness to influence outcomes			
	3.6 Explain the purpose of collective responsibility			
4 Understand how to assess decisions and their effects	4.1 Evaluate ways to monitor the effect of decisions and identify learning points			
	4.2 Explain how to review the decision-making process			
5 Be able to prepare background information to make decisions	5.1 Research and collect information to add value to the decision-making process			
	5.2 Evaluate sources of information needed			
6 Be able to make decisions	6.1 Identify and agree criteria for making a decision			
	6.2 Review information provided in order to make a decision			
	6.3 Structure ideas, information and recommendations in a logical and meaningful way			
	6.4 Present rationale and conclusions to others using accurate and current information			
	6.5 Provide additional information to support conclusions			
	6.6 Respond as required when asked to supply information to help with decision-making			
	6.7 Respect other people's contributions to the decision-making process			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	6.8 Use evidence, argument, questioning and assertiveness to justify decision(s)			
	6.9 Listen to other people's feedback and record for future evaluation			
	6.10 Confirm support for the decision(s)			
7 Be able to assess contributions to decision-making	7.1 Assess contributions made to the decision-making process			
	7.2 Identify learning points to improve future decision-making			

Learner name: _____

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Assessor signature: _____

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(if sampled)

Unit 28: Negotiate in a business environment

Unit reference number: D/601/2525

Level: 3

Credit value: 5

Guided learning hours: 20

Unit summary

This unit is about preparing for and carrying out straightforward negotiations with other parties, in a business environment, in order to reach an agreement on an activity or activities that meets the needs of an organisation.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand how to prepare for negotiations	1.1	Outline the main principles of negotiations		
		1.2	Outline the process of negotiation and how it is used in business		
		1.3	Outline the purpose of different negotiation strategies and techniques		
		1.4	Explain the value of understanding the roles of other negotiators		
		1.5	Explain the purpose of knowing limits of own responsibility in negotiations		
		1.6	Explain the purpose of having clear objectives for negotiations		
2	Understand how to conduct negotiations	2.1	Explain the purpose of being flexible during negotiations while seeking to achieve the main objectives		
		2.2	Explain the purpose of keeping to the brief during negotiations		
		2.3	Explain the purpose of keeping to own level of authority during negotiations		
		2.4	Explain the purpose of referring issues to others, as required		
		2.5	Explain the purpose of keeping goodwill during negotiations, and ways of doing so		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.6 Explain when it might be necessary to withdraw from negotiations			
	2.7 Explain how to withdraw from negotiations in a way that maintains goodwill			
3 Understand how to complete negotiations	3.1 Explain the purpose of achieving an outcome that meets main objectives			
	3.2 Explain the purpose of keeping an accurate record of negotiations, if required			
4 Be able to prepare for negotiation	4.1 Identify objectives to be achieved			
	4.2 Identify potential problems in negotiation(s) and ways of overcoming them			
5 Be able to conduct negotiations	5.1 Carry out negotiations within limits of own authority			
	5.2 Make proposals which meet main objectives			
	5.3 Use negotiation strategy to obtain results that meet minimum or agreed outcomes			
	5.4 Clarify other negotiator's understanding, and respond to their queries			
	5.5 Suggest solutions to deal with problems, if required			
	5.6 Refer the negotiation to others, when required			
	5.7 Carry out negotiations in a way that maintains goodwill and promotes a positive image of self and an organisation			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Be able to complete negotiations	6.1 Reach an agreement to the satisfaction of all those involved in the negotiations, where possible			
	6.2 Maintain records of the negotiations, if required			
	6.3 Complete negotiations in a way that maintains goodwill and promotes a positive image of self and an organisation			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 29: Plan and organise an event

Unit reference number: R/601/2540

Level: 3

Credit value: 4

Guided learning hours: 28

Unit summary

This unit is about understanding venues, arrangements and the role of an event organiser, as well as being able to plan and organise an event.

Barred combinations

This unit cannot be taken with *Unit 30: Co-ordinate an event (Y/601/2541)*.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example:

- Pearson Edexcel Level 2 NVQ Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand the arrangements to be made when planning and organising an event	2.1 Explain the role of the event organiser for: <ul style="list-style-type: none"> a) anticipating and planning for all delegate provision and needs before and during the event, including investigating and providing for any special requirements b) meeting relevant health, safety and security arrangements c) meeting legal and organisational requirements for contracts d) organising resources and the production of event materials e) the types of activities and resources that may be needed during an event f) liaison with the venue and the supporting team to make sure all requirements are met and roles are understood 			
3 Understand the different types of venues and resources needed for different types of events	3.1 Identify and evaluate different types of venue in terms of suitability for events and costs			
	3.2 Describe a range of resources that may be needed for events and illustrate how they may be used			
	3.3 Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to plan and organise an event	4.1 Agree an event brief and budget			
	4.2 Agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies			
	4.3 Identify and agree resources and support needed for organising an event			
	4.4 Agree requirements for venue(s)			
	4.5 Identify venue and agree costings			
	4.6 Liaise with the venue to confirm event requirements and/or any special delegate requirements			
	4.7 Agree requirements for resources			
	4.8 Co-ordinate resources and production of event materials			
	4.9 Make sure arrangements are in place for the event to meet relevant health, safety and security requirements			
	4.10 Make sure legal and organisational requirements for contracts are met			
	4.11 Make sure that all those involved are briefed and trained to fulfil their roles			
	4.12 Delegate functions to the event team as required			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.13 Make arrangements for rehearsals to make sure the event runs smoothly, if required			
	4.14 Make sure invitations are sent out to delegates			
	4.15 Manage delegate responses			
	4.16 Prepare joining instructions and event materials to be sent to delegates			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 30: Co-ordinate an event

Unit reference number: Y/601/2541

Level: 3

Credit value: 4

Guided learning hours: 30

Unit summary

This unit is about understanding the role of an event co-ordinator, and also about being able to co-ordinate an event.

Barred combinations

This unit cannot be taken with *Unit 29: Plan and organise an event* (R/601/2540).

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example:

- Pearson Edexcel Level 2 NVQ Award/Certificate/Diploma in Business and Administration
- Pearson Edexcel Level 3 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief	1.1	Explain the responsibilities of an event co-ordinator		
		1.2	Describe the purpose of agreeing a plan that meets the objectives of the event brief		
2	Understand the activities required when co-ordinating an event	2.1	<p>Explain the role of the event co-ordinator during the event for:</p> <ul style="list-style-type: none"> a) all delegate provision and needs b) meeting relevant health, safety and security requirements c) observing legal and organisational requirements for contracts d) co-ordinating resources and the use of event materials e) liaising with the venue and supporting team during an event to make sure all requirements are met and roles are carried out f) resolving problems g) overseeing the work of key staff 		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.2 Explain the role of an event co-ordinator after an event for: <ul style="list-style-type: none"> a) clearing and vacating the venue b) organising follow up papers and activities, if required c) reconciling accounts to budget d) evaluating an event and the methods that can be used to do this 			
3 Be able to co-ordinate an event	3.1 Prepare the venue and make sure all necessary resources are in place			
	3.2 Co-ordinate activities during an event, in line with agreed plans			
	3.3 Help delegates to feel welcome			
	3.4 Respond to delegates' needs throughout an event			
	3.5 Resolve problems, as required			
	3.6 Oversee the work of key staff during the event			
	3.7 Monitor compliance with relevant health, safety and security requirements			
	3.8 Liaise with the management of the venue to make sure facility resources are in place			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.9 Arrange clearing, and vacating the venue according to the terms of the contract			
	3.10 Prepare and circulate papers, or complete other follow up actions following the event, if required			
	3.11 Reconcile accounts to budget, if required			
	3.12 Evaluate an event identifying recommendations and passing these on to relevant colleagues, where relevant			
	3.13 Agree key learning points and use these to improve the running of future events			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 31: Chair meetings

Unit reference number: J/601/2566

Level: 4

Credit value: 4

Guided learning hours: 16

Unit summary

This unit is about the role of the chairperson before, during and after business meetings.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Business Administration, owned by the Council for Administration. This unit can also be found in other qualifications, for example Pearson Edexcel Level 4 NVQ Certificate/Diploma in Business and Administration

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the role of the chair in meetings	1.1	Explain the role of the chair before, during and after a meeting		
		1.2	Analyse different types of meetings and how to run them		
		1.3	Explain the purpose of preparing for formal meetings		
		1.4	Explain the reasons for agreeing the purpose of meetings		
		1.5	Explain the reasons for agreeing the timing of the meeting to make sure key people can attend or be represented		
		1.6	Describe how to chair meetings to keep to agreed timings, as required		
		1.7	Explain the reasons for giving people information about facilities and arrangements, including health and safety procedures		
		1.8	Explain the benefits of effective communication skills		
		1.9	Explain how effective interpersonal skills can impact on the success of meetings		
		1.10	Explain how to facilitate discussions so that the purpose of each agenda item is achieved		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	1.11 Explain how to summarise discussions and agree actions at appropriate points			
	1.12 Analyse techniques for keeping to meeting timings, agenda, and purpose			
	1.13 Explain reasons for liaising with meeting organiser if not the chair			
	1.14 Describe the types of problems that may occur when chairing meetings, and how to resolve them			
	1.15 Describe the purpose of approving records of meetings			
	1.16 Explain the purpose of follow-up actions, and evaluation of meetings			
	1.17 Explain the purpose of reflecting on whether the meeting met its purpose and agreeing learning points for the future			
2 Be able to prepare for chairing a meeting	2.1 Agree the purpose of a meeting			
	2.2 Agree the scheduling of a meeting so that key people can attend			
	2.3 Make sure meeting facilities meet requirements			
	2.4 Agree agenda items for a meeting, including timing and any papers required to achieve purpose			
	2.5 Read briefing papers and identify key issues, consulting as required			
	2.6 Liaise with meeting organiser if not the chair of the meeting			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to chair a meeting using interpersonal and organisational skills	3.1 Greet people attending the meeting			
	3.2 Keep to timings as required			
	3.3 Give details of facilities and arrangements			
	3.4 Follow an agenda			
	3.5 Make sure those present have an opportunity to contribute to the meeting			
	3.6 Keep the meeting on track to achieve its purpose			
	3.7 Resolve any problems that occur			
	3.8 Summarise discussions and agree actions			
	3.9 Observe formal voting and approval procedures, if required			
	3.10 Agree date, time and location of next meeting, if required			
	3.11 Close the meeting on time			
4 Be able to follow up and evaluate a meeting that has been chaired	4.1 Approve a meeting record and list of actions			
	4.2 Make sure agreed actions are implemented			
	4.3 Evaluate the outcomes of a meeting in terms of its purpose			
	4.4 Agree learning points for future meetings, if required			

Learner name: _____

Date: _____

Learner signature: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 32: Plan, allocate and monitor work of a team

Unit reference number: Y/600/9669

Level: 3

Credit value: 5

Guided learning hours: 25

Unit summary

This unit is about planning, allocating and monitoring work of a team. This includes managing and evaluating the performance of team members, and being able to improve team performance.

Relationship with National Occupational Standards and other qualifications

This unit is based on the NOS for Management and Team Leading, owned by the Council for Administration. This unit can also be found in other qualifications, for example Pearson Edexcel Level 2 NVQ Certificate in Team Leading

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to plan work for a team	1.1	Agree team objectives with own manager		
		1.2	Develop a plan for a team to meet agreed objectives, taking into account capacity and capabilities of the team		
2	Be able to allocate work across a team	2.1	Discuss team plans with a team		
		2.2	Agree work allocation and SMART (Specific, Measurable, Achievable, Realistic and Time-bound) objectives with team members		
		2.3	Agree standard of work required by team		
3	Be able to manage team members to achieve team objectives	3.1	Support all team members in order to achieve team objectives		
4	Be able to monitor and evaluate the performance of team members	4.1	Assess team members' work against agreed standards and objectives		
		4.2	Identify and monitor conflict within a team		
		4.3	Identify causes for team members not meeting team objectives		
5	Be able to improve the performance of a team	5.1	Identify ways of improving team performance		
		5.2	Provide constructive feedback to team members to improve their performance		
		5.3	Implement identified ways of improving team performance		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 33: Presentation software

Unit reference number: M/502/4622

Level: 2

Credit value: 4

Guided learning hours: 30

Unit summary

This unit is about the skills and knowledge an IT user needs to select and use a wide range of intermediate presentation software tools and techniques effectively to produce presentations that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Presentation tools and techniques at this level will be described as 'intermediate' because:

- the software tools and functions used will be at times non-routine or unfamiliar
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements
- the user will take some responsibility for inputting, structuring, editing and presenting the information, which at times may be non-routine or unfamiliar.

Barred combinations

This unit cannot be taken with *Unit 34: Presentation software (T/502/4623)*.

Relationship with other qualifications

This unit also appears in general IT qualifications, including those from the ITQ suite of qualifications, for example:

- Pearson Edexcel BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 3 Award/Certificate for IT Users (ITQ)

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Input and combine text and other information within presentation slides	1.1	Identify what types of information are required for the presentation		
		1.2	Enter text and other information using layouts appropriate to type of information		
		1.3	Insert charts and tables into presentation slides		
		1.4	Insert images, video or sound to enhance the presentation		
		1.5	Identify any constraints which may affect the presentation		
		1.6	Organise and combine information of different forms or from different sources for presentations		
		1.7	Store and retrieve presentation files effectively, in line with local guidelines and conventions where available		
2	Use presentation software tools to structure, edit and format slide sequences	2.1	Identify what slide structure and themes to use		
		2.2	Select, change and use appropriate templates for slides		
		2.3	Select and use appropriate techniques to edit slides and presentations to meet needs		
		2.4	Select and use appropriate techniques to format slides and presentations		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.5 Identify what presentation effects to use to enhance the presentation			
	2.6 Select and use animation and transition effects appropriately to enhance slide sequences			
3 Prepare slideshow for presentation	3.1 Describe how to present slides to meet needs and communicate effectively			
	3.2 Prepare slideshow for presentation			
	3.3 Check presentation meets needs, using IT tools and making corrections as necessary			
	3.4 Identify and respond to any quality problems with presentations to ensure that presentations meet needs			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 34: Presentation software

Unit reference number: T/502/4623

Level: 3

Credit value: 6

Guided learning hours: 45

Unit summary

This unit is about the skills and knowledge an IT user needs to select and use a wide range of advanced presentation software tools and techniques effectively to produce presentations that include a combination of media (for example images, animation and sound) for education, entertainment or information sharing, and are complex or non-routine.

Presentation tools and techniques will be described as 'advanced' because:

- the software tools and functions used will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (for example improve efficiency or create an effect), exploring technical support, self-teaching and applying
- the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application
- the user will take full responsibility for inputting, structuring, editing and presenting the information.

Barred combinations

This unit cannot be taken with *Unit 33: Presentation software* (M/502/4622).

Relationship with other qualifications

This unit also appears in general IT qualifications, including those from the ITQ suite of qualifications, for example:

- Pearson Edexcel BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 3 Award/Certificate/Diploma for IT Users (ITQ)

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Input and combine text and other information within presentation slides	1.1	Explain what types of information are required for the presentation		
		1.2	Enter text and other information using layouts appropriate to type of information		
		1.3	Insert charts and tables and link to source data		
		1.4	Insert images, video or sound to enhance the presentation		
		1.5	Identify any constraints which may affect the presentation		
		1.6	Organise and combine information for presentations in line with any constraints		
		1.7	Store and retrieve presentation files effectively, in line with local guidelines and conventions where available		
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		
		2.2	Create, amend and use appropriate templates and themes for slides		
		2.3	Explain how interactive and presentation effects can be used to aid meaning or impact		
		2.4	Select and use appropriate techniques to edit and format presentations to meet needs		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.5 Create and use interactive elements to enhance presentations			
	2.6 Select and use animation and transition techniques appropriately to enhance presentations			
3 Prepare interactive slideshow for presentation	3.1 Explain how to present slides to communicate effectively for different contexts			
	3.2 Prepare interactive slideshow and associated products for presentation			
	3.3 Check presentation meets needs, using IT tools and making corrections as necessary			
	3.4 Evaluate presentations, identify any quality problems and discuss how to respond to them			
	3.5 Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 35: Spreadsheet software

Unit reference number: F/502/4625

Level: 2

Credit value: 4

Guided learning hours: 30

Unit summary

This unit is about the skills and knowledge an IT user needs to select and use a wide range of intermediate spreadsheet software tools and techniques to produce, present, and check spreadsheets that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Spreadsheet software tools and techniques will be described as 'intermediate' because:

- the range of data entry, manipulation and outputting techniques will be at times non-routine or unfamiliar
- the tools, formulas and functions needed to analyse and interpret the data requires knowledge and understanding (for example, mathematical, logical, statistical or financial)
- the user will take some responsibility for setting up or developing the structure and functionality of the spreadsheet.

Barred combinations

This unit cannot be taken with *Unit 36: Spreadsheet software (J/502/4626)*.

Relationship with other qualifications

This unit also appears in general IT qualifications, including those from the ITQ suite of qualifications, for example:

- Pearson Edexcel BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 3 Award/Certificate for IT Users (ITQ)

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
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		
		1.2	Enter and edit numerical and other data accurately		
		1.3	Combine and link data across worksheets		
		1.4	Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available		
2	Select and use appropriate formulas and data analysis tools to meet requirements	2.1	Identify which tools and techniques to use to analyse and manipulate data to meet requirements		
		2.2	Select and use a range of appropriate functions and formulas to meet calculation requirements		
		2.3	Use a range of tools and techniques to analyse and manipulate data to meet requirements		
3	Select and use tools and techniques to present and format spreadsheet information	3.1	Plan how to present and format spreadsheet information effectively to meet needs		
		3.2	Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets		
		3.3	Select and format an appropriate chart or graph type to display selected information		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.4 Select and use appropriate page layout to present and print spreadsheet information			
	3.5 Check information meets needs, using spreadsheet tools and making corrections as necessary			
	3.6 Describe how to find errors in spreadsheet formulas			
	3.7 Respond appropriately to any problems with spreadsheets			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 36: Spreadsheet software

Unit reference number: J/502/4626

Level: 3

Credit value: 6

Guided learning hours: 45

Unit summary

This unit is about the skills and knowledge an IT user needs to select and use a wide range of advanced spreadsheet software tools and techniques to produce, present and check complex and non-routine spreadsheets.

Spreadsheet software tools and techniques will be described as 'advanced' because:

- the range of data entry, manipulation and outputting techniques will be complex and non-routine
- the tools, formulas and functions needed to analyse and interpret the required information require complex and non-routine knowledge and understanding (for example, data restrictions, data validation using formula, pivot tables, data maps)
- the user will take full responsibility for setting up and developing the functionality of the spreadsheet.

Barred combinations

This unit cannot be taken with *Unit 35: Spreadsheet software (F/502/4625)*.

Relationship with other qualifications

This unit also appears in general IT qualifications, including those from the ITQ suite of qualifications, for example:

- Pearson Edexcel BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 3 Award/Certificate/Diploma for IT Users (ITQ)

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
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		
		1.2	Enter and edit numerical and other data accurately		
		1.3	Combine and link data from different sources		
		1.4	Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available		
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		
		2.2	Select and use a wide range of appropriate functions and formulas to meet calculation requirements		
		2.3	Select and use a range of tools and techniques to analyse and interpret data to meet requirements		
		2.4	Select and use forecasting tools and techniques		
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		
		3.2	Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.3 Select and use appropriate tools and techniques to generate, develop and format charts and graphs			
	3.4 Select and use appropriate page layout to present, print and publish spreadsheet information			
	3.5 Explain how to find and sort out any errors in formulas			
	3.6 Check spreadsheet information meets needs, using IT tools and making corrections as necessary			
	3.7 Use auditing tools to identify and respond appropriately to any problems with spreadsheets			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 37: Using collaborative technologies

Unit reference number: F/502/4379

Level: 2

Credit value: 4

Guided learning hours: 30

Unit summary

This unit is about the skills and knowledge to facilitate the use of appropriate combinations of IT tools and devices for groups to work collaboratively by:

- planning and selecting the IT tools and devices to be used for work purposes and tasks, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools
- preparing and setting up access to collaborative technologies
- presenting information and facilitating others' contributions
- moderating the use of collaborative technologies.

Barred combinations

This unit cannot be taken with *Unit 38: Using collaborative technologies* (T/502/4380).

Relationship with other qualifications

This unit also appears in general IT qualifications, including those from the ITQ suite of qualifications, for example:

- Pearson Edexcel BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 3 Award/Certificate for IT Users (ITQ)

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Stay safe and secure when working with collaborative technology	1.1 Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines			
	1.2 Explain what risks there may be in using collaborative technology and how to keep them to a minimum			
	1.3 Use appropriate methods to promote trust when working collaboratively			
	1.4 Carry out appropriate checks on others' online identities and different types of information			
	1.5 Identify and respond to inappropriate content and behaviour			
2 Plan and set up IT tools and devices for collaborative working	2.1 Describe the purposes for using collaborative technologies			
	2.2 Describe what outcomes are needed from collaborative working and whether or not archiving is required			
	2.3 Describe the roles, IT tools and facilities needed for collaborative tasks and communication media			
	2.4 Describe the features, benefits and limitations of different collaborative technology tools and devices			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.5 Describe the compatibility issues in different combinations of collaborative tools and devices			
	2.6 Select an appropriate combination of IT tools and devices to carry out collaborative tasks			
	2.7 Connect and configure the combination of IT tools and devices needed for a collaborative task			
3 Prepare collaborative technologies for use	3.1 Describe what access rights and issues others may have in using collaborative technologies			
	3.2 Assess what permissions are needed for different users and content			
	3.3 Set up and use access rights to enable others to access information			
	3.4 Set up and use permissions to filter information			
	3.5 Adjust settings so that others can access IT tools and devices for collaborative working			
	3.6 Select and use different elements to control environments for collaborative technologies			
	3.7 Select and join networks and data feeds to manage data to suit collaborative tasks			

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

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 38: Using collaborative technologies

Unit reference number: T/502/4380

Level: 3

Credit value: 6

Guided learning hours: 45

Unit summary

This unit is about the skills and knowledge needed to manage and effectively integrate and facilitate the safe use of multiple IT tools and devices so that groups can work collaboratively and effectively by:

- setting and implementing guidelines for using collaborative technologies, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools
- integrating IT tools and devices and creating environments to exploit their potential
- managing risks, permissions and data flow
- moderating and solving complex problems with the use of collaborative technologies.

Barred combinations

This unit cannot be taken with *Unit 37: Using collaborative technologies* (F/502/4379).

Relationship with other qualifications

This unit also appears in general IT qualifications, including those from the ITQ suite of qualifications, for example:

- Pearson Edexcel BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 3 Award/Certificate/Diploma for IT Users (ITQ)

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Stay safe and secure when working with collaborative technology	1.1	Explain what and why guidelines need to be established for working with collaborative technology		
		1.2	Develop and implement guidelines for good practice in working with collaborative technology		
		1.3	Explain how to establish an identity or present information that will promote trust		
		1.4	Develop and implement guidelines for checking the authenticity of identities and different types of information		
		1.5	Analyse and plan for the risks in the use of collaborative technologies for different tasks		
		1.6	Analyse and manage risks in the use of collaborative technologies		
2	Plan and set up IT tools and devices for collaborative working	2.1	Explain the features, benefits and limitations of different collaborative IT tools and devices for work purposes and tasks		
		2.2	Determine the IT tools and processes needed for archiving the outcomes of collaborative working		
		2.3	Summarise ways to integrate different collaborative technology tools and devices for a range of purposes, tasks and communication media		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.4 Explain potential access and compatibility issues with integrating different collaborative technology tools and devices			
	2.5 Select, connect and configure combinations that exploit the capabilities and potential of collaborative tools and devices			
	2.6 Resolve access and compatibility problems so that different collaborative tools and devices work successfully			
3 Prepare collaborative technologies for use	3.1 Evaluate data management principles, issues and methods			
	3.2 Manage levels of access and permissions for different purposes			
	3.3 Select and integrate different elements across applications to create environments for collaborative technologies			
	3.4 Set and adjust settings to facilitate use of collaborative technologies by others			
	3.5 Manage data flow to benefit collaborative working			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Manage tasks using collaborative technologies	4.1 Determine levels of responsibility for the use of collaborative technologies			
	4.2 Facilitate others' responsible contributions to and engagement with collaborative technologies			
	4.3 Manage the moderation of collaborative technologies			
	4.4 Oversee the archiving of the outcomes of collaborative working			
	4.5 Explain what problems can occur with collaborative technologies			
	4.6 Respond to problems with collaborative technologies and be prepared to help others to do so			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 39: Website software

Unit reference number: R/502/4631

Level: 2

Credit value: 4

Guided learning hours: 30

Unit summary

This unit is about the skills and knowledge an IT user needs to select and use a wide range of intermediate website software tools and techniques to produce multiple-page websites. Any aspect that is unfamiliar may require support and advice from others.

Website software tools and techniques will be described as 'intermediate' because:

- the software tools and functions involved will at times be non-routine or unfamiliar
- the choice and use of development techniques will need to take account of a number of factors or elements
- the user will take some responsibility for planning the website, creating or altering the template, inputting, manipulating, linking and uploading the content.

Barred combinations

This unit cannot be taken with *Unit 40: Website software* (Y/502/4632).

Relationship with other qualifications

This unit also appears in general IT qualifications, including those from the ITQ suite of qualifications, for example:

- Pearson Edexcel BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 3 Award/Certificate for IT Users (ITQ)

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Create structures and styles for websites	1.1	Describe what website content and layout will be needed for each page		
		1.2	Plan and create web page templates to layout		
		1.3	Select and use website features and structures to help the user navigate round web pages within the site		
		1.4	Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand		
		1.5	Describe how copyright and other constraints may affect the website		
		1.6	Describe what access issues may need to be taken into account		
		1.7	Describe what file types to use for saving content		
		1.8	Store and retrieve files effectively, in line with local guidelines and conventions where available		
2	Use website software tools to prepare content for websites	2.1	Prepare content for web pages so that it is ready for editing and formatting		
		2.2	Organise and combine information needed for web pages including across different software		
		2.3	Select and use appropriate editing and formatting techniques to aid both clarity and navigation		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.4 Select and use appropriate development techniques to link information across pages			
	2.5 Change the file formats appropriately for content			
	2.6 Check web pages meet needs, using IT tools and making corrections as necessary			
3 Publish websites	3.1 Select and use appropriate testing methods to check that all elements of websites are working as planned			
	3.2 Identify any quality problems with websites and how to respond to them			
	3.3 Select and use an appropriate programme to upload and publish the website			
	3.4 Respond appropriately to problems with multiple-page websites			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 40: Website software

Unit reference number: Y/502/4632

Level: 3

Credit value: 5

Guided learning hours: 40

Unit summary

This unit is about the skills and knowledge an IT user needs to select and use a range of advanced website software tools and techniques to develop multiple-page websites with multimedia and interactive features.

Website software techniques will be described as 'advanced' because:

- the software tools and functions used will be complex and at times involve having the idea that there may be a tool or function to do something (for example improve efficiency or create an effect), exploring technical support, self-teaching and applying
- the development techniques will be complex, and will involve research, identification and application
- the user will take full responsibility for planning and developing the structure, inputting, manipulating, adding multimedia or interactive features, uploading and publishing the information.

Barred combinations

This unit cannot be taken with *Unit 39: Website software* (R/502/4631).

Relationship with other qualifications

This unit also appears in general IT qualifications, including those from the ITQ suite of qualifications, for example:

- Pearson Edexcel BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 3 Award/Certificate/Diploma for IT Users (ITQ)

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Create structures and styles and use them to produce websites	1.1	Determine what website content and layout will be needed for each page and for the site		
		1.2	Plan and create web page templates to layout content		
		1.3	Select and use website features and structures to enhance website navigation and functionality		
		1.4	Create, select and use styles to enhance website consistency and readability		
		1.5	Provide guidance on laws, guidelines and constraints that affect the content and use of websites		
		1.6	Explain what access issues may need to be taken into account		
		1.7	Explain when and why to use different file types for saving content		
		1.8	Store and retrieve files effectively, in line with local guidelines and conventions where available		
2	Select and use website software tools and features to develop multiple page websites with multimedia and interactive features	2.1	Prepare content for web pages so that it is ready for editing and formatting		
		2.2	Organise and combine information needed for web pages in line with any copyright constraints, including across different software		
		2.3	Select and use appropriate editing and formatting techniques to aid meaning		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.4 Select and use appropriate programming and development techniques to add features and enhance websites			
	2.5 Select and use file formats that make information easier to download			
	2.6 Check web pages meet needs, using IT tools and making corrections as necessary			
3 Publish and test multiple-page websites with multimedia and interactive features	3.1 Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned			
	3.2 Identify any quality problems with websites and explain how to respond to them			
	3.3 Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently			
	3.4 Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 41: Bespoke software

Unit reference number: F/502/4396

Level: 2

Credit value: 3

Guided learning hours: 20

Unit summary

This unit is about the skills and knowledge needed by an IT user to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Bespoke software tools and techniques will be defined as 'intermediate' because:

- the software tools and functions involved will at times be non-routine or unfamiliar
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements and at times be multi-step
- the user will take some responsibility for inputting, manipulating and outputting the information.

Barred combinations

This unit cannot be taken with *Unit 42: Bespoke software (J/502/4397)*.

Relationship with other qualifications

This unit also appears in general IT qualifications, including those from the ITQ suite of qualifications, for example:

- Pearson Edexcel BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson Edexcel BTEC Level 3 Award/Certificate for IT Users (ITQ)

Evidence requirements

Assessment must be carried out in a way that is consistent with the requirements outlined in *Annexe C: Assessment methodology*.

To pass the unit, learners must meet all of the assessment criteria.

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Input and combine information using bespoke applications	1.1	Input relevant information accurately so that it is ready for processing		
		1.2	Select and use appropriate techniques to link and combine information of different forms or from different sources within the software		
		1.3	Respond appropriately to data entry error messages		
2	Use appropriate structures to organise and retrieve information efficiently	2.1	Describe what functions to apply to structure and layout information effectively		
		2.2	Select and use appropriate structures and/or layouts to organise information		
		2.3	Apply local and/or legal guidelines and conventions for the storage and use of data where available		
3	Use the functions of the software effectively to process and present information	3.1	Select and use appropriate tools and techniques to edit, process and format information		
		3.2	Check information meets needs, using IT tools and making corrections as necessary		
		3.3	Select and use appropriate methods to present information		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Recording of evidence

The type of evidence, portfolio reference and date should be entered against each assessment criterion in the table. Alternatively, centre documentation could be used to record this information. Evidence such as confidential documents must not be included in a portfolio, but their location must be recorded in assessment documentation. All assessment evidence must be accessible for internal verifiers and Pearson standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Input and combine information using bespoke software	1.1	Input relevant information accurately so that it is ready for processing		
		1.2	Select and use appropriate techniques to link and combine information within the application and across different software applications		
2	Create and modify appropriate structures to organise and retrieve information efficiently	2.1	Evaluate the use of software functions to structure, layout and style information		
		2.2	Create, change and use appropriate structures and/or layouts to organise information efficiently		
		2.3	Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available		
3	Exploit the functions of the software effectively to process and present information	3.1	Select and use appropriate tools and techniques to edit, analyse and format information		
		3.2	Check information meets needs, using IT tools and making corrections as necessary		
		3.3	Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs		
		3.4	Select and use presentation methods to aid clarity and meaning		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications

- Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications (Joint Council for Qualifications (JCQ))
- Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units (Pearson)
- General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures (JCQ)
- Equality Policy (Pearson)
- Recognition of Prior Learning Policy and Process (Pearson)
- UK Information Manual (Pearson)
- Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance (Pearson)

All of these publications are available on our website: qualifications.pearson.com

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website on the Delivering BTEC pages. Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website.

How to obtain National Occupational Standards

To obtain the National Occupational Standards go to www.ukstandards.org.uk.

Professional development and training

Pearson supports UK and international customers with training related to NVQ and BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (<http://qualifications.pearson.com/en/support/training-from-pearson-uk.html#step1>). You can request customised training through the website or by contacting one of our advisers in the Training from Pearson team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

Contact us

We have a dedicated Account Support team, across the UK, to give you more personalised support and advice.

To contact your Account Specialist:

Email: wblcustomerservices@pearson.com

Telephone: 0844 576 0045

If you are new to Pearson and would like to become an approved centre, please contact us by:

Email: wbl@pearson.com

Telephone: 0844 576 0045

Annexe A: Quality assurance

Key principles of quality assurance

- A centre delivering Pearson qualifications must be a Pearson recognised centre and must have approval for qualifications that it is offering.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to the effective delivery and quality assurance of assessment. The centre must abide by these conditions throughout the period of delivery.
- Pearson makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Pearson qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes and dealing with special circumstances, appeals and malpractice.

Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Pearson. Pearson is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. The specific arrangements for working with centres will vary. Pearson seeks to ensure that the quality-assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them in providing robust quality-assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Pearson operates a quality-assurance process, designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres offering these qualifications must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Pearson.

The Pearson quality-assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Pearson qualifications
- annual visits to centres by Pearson for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by a Pearson quality development reviewer
- annual visits by occupationally competent and qualified Pearson Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Centres are required to declare their commitment to ensuring quality and appropriate opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Annexe B: Centre certification and registration

Pearson Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Pearson will maintain the integrity of Pearson Edexcel NVQs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Pearson will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Pearson in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Pearson will aim to secure the appropriate expertise to provide this.

What are the access arrangements and special considerations for the qualifications in this specification?

Centres are required to recruit learners to Pearson qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Pearson's policy on access arrangements and special considerations for Pearson qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the Equality Act 2010) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications* for further details. qualifications.pearson.com

Annexe C: Assessment methodology

The purpose of this assessment methodology is to ensure that the Pearson Edexcel Level 2 NVQ Certificate in Marketing and the Pearson Edexcel Level 3 NVQ Diploma in Marketing are subject to consistently rigorous and fair assessment. It is also designed to ensure that individuals who make judgments about competence are both qualified and competent to do so.

The assessment methodology addresses issues of:

1. Evidence requirements
2. Approaches to assessment
3. Acceptable types of evidence
4. Simulation
5. Criteria for the appointment of assessors
6. Criteria for the appointment of internal verifiers
7. Criteria for the appointment of standards verifiers.

1. Evidence requirements

- 1.1 To achieve units within the qualifications learners must demonstrate that they meet all learning outcomes and assessment criteria.
- 1.2 Within the learning outcomes for the units, there is generally a mix of assessment criteria that relate to performance and those that relate to knowledge/understanding.
- 1.3 For assessment criteria that relate to performance, learners must compete real work activities. Where this is not possible simulation in a realistic working environment may be used (see *section 4*).
- 1.4 For assessment criteria that relate to knowledge and understanding, the learner must relate their knowledge and understanding to the work environment.

2. Approaches to assessment

- 2.1 Although individual units define specific learning outcomes and assessment criteria, it is not a requirement that units be taught and assessed individually. Where two or more units within a qualification contain similar or complementary assessment criteria, it is acceptable and potentially desirable that such units be assessed together where practicable.

- 2.2 It will be the assessor's responsibility to agree the best method of assessing a learner in relation to their individual circumstances. The agreed methods must be:
- valid
 - reliable
 - safe and manageable
 - suitable to the needs of the learner.

3 Acceptable types of evidence

- 3.1 A range of different types of evidence is desirable to demonstrate achievement of these qualifications. These could include:
- *Direct observation of the learner's performance*: this should form a substantial part of the evidence.
 - *Products of the learner's work*: as would be contained within a portfolio or signposted to its location within in the workplace.
 - *Professional discussion*: an in-depth discussion recorded electronically or in writing. Assessors must be able to authenticate what learners have discussed. This may be through confirmation from a third party or sight of the documentation discussed.
 - *Witness testimony/expert witness testimony*: this can be provided to the assessor either in writing or orally; if provided orally, the assessor must make appropriate written records. The name of the witness/expert witness and their relationship to the learner should be clearly documented.
 - *Outcomes from oral or written questioning*: using open questions to elicit detailed replies. Assessor records should include sufficient detail to justify assessment decisions.
 - *Recognition of Prior Learning*: in all instances where recognition of prior learning is used as a form of evidence, assessors must ensure the learner's knowledge or competence remains current and that it complies with *Section 1: Evidence requirements*. Assessor records should include sufficient detail to justify assessment decisions.

4. Simulation

- 4.1 Simulation is only allowed in situations where:
- a learner is required to complete a work activity that does not occur on a regular basis and therefore opportunities to complete it do not easily arise
 - a learner is required to respond to a situation that rarely occurs, such as responding to an emergency situation
 - the safety of a learner, other individuals and/or resources would be put at risk.

- 4.2 Simulations should match the conditions of a realistic working environment. This means that the conditions should match those found in the workplace, including:
- facilities and equipment
 - relationships with colleagues
 - responsibilities
 - time pressures.
- 4.3 All simulations must be planned, delivered and documented by the centre in a way that ensures the simulation accurately reflects what the unit seeks to assess.
- 4.4 Assessors should confirm with their internal verifier about the validity of any simulation scenario, prior to its use.
- 4.5 Where possible, the centre should confirm with its external verifier about the validity of any simulation scenario, prior to its use.

5. Criteria for appointment of assessors

Centres must comply with all of the requirements set out below.

- 5.1 Assessors must have sufficient occupational competence. This means that, for the units they are assessing, the assessor must be sufficiently competent to make assessment judgements about the quality of the assessment and the assessment process.

This competence must be current and verifiable, and must be sufficient to be effective and reliable when judging the learner's competence. Experience and knowledge can be confirmed in various ways, for example through:

- CV and references
 - possession of relevant qualification(s)
 - membership of a relevant professional institution.
- 5.2 Assessors must provide evidence of maintaining their occupational competence, for example by maintaining a CPD log.
- 5.3 Assessors must:
- be fully conversant with the units against which the assessments and verification are to be undertaken
 - understand the structure of the qualification

5.4 Assessors must **either**:

- hold one of the following assessor awards: D32; D33; A1; Level 3 Award in Assessing Competence in the Work Environment

or

- have a clear plan for achieving one of the approved assessor awards within 12 months of starting in the role of assessor. In addition, all assessment decisions made by a trainee assessor must be checked by a qualified assessor.

6. Criteria for appointment of internal verifiers

Centres must comply with all of the requirements set out below.

- 6.1 Internal verifiers (IVs) must have sufficient occupational competence. This means that, for the units they are verifying, the IV must be sufficiently competent to make verification judgements about the quality of the assessment and the assessment process.

This competence must be current and verifiable, and must be sufficient to be effective and reliable when judging the learner's competence. Experience and knowledge can be confirmed in various ways, for example through:

- CV and references
- possession of relevant qualification(s)
- membership of a relevant professional institution.

- 6.2 IVs must provide evidence of maintaining their occupational competence, for example by maintaining a CPD log.

6.3 IVs must:

- be fully conversant with the standards and assessment criteria in the units being verified
- understand the structure of the qualification
- understand Pearson's quality assurance systems and requirements for this qualification.

6.4 IVs must **either**:

- hold one of the following internal verifier awards: D34; V1; Level 4 Award in the Internal Quality Assurance of Assessment Processes and Practice

or

- have a clear plan for achieving one of the approved internal verifier awards within 12 months of starting in the role of internal verifier. In addition, all assessment decisions made by a trainee IV must be checked by a qualified IV

7. Criteria for the appointment of standards verifiers

Pearson will ensure that its standards verifiers (SVs) comply with the following criteria.

- 7.1 SVs must have sufficient occupational competence. This means that, for the units they are verifying, the SV must be sufficiently competent to make verification judgements about the quality of the assessment and the assessment process.
- 7.2 SVs must also:
 - be fully conversant with the standards and assessment criteria in the units being verified
 - understand the structure of the qualification
 - understand Pearson's quality assurance systems and requirements for the qualification.
 - demonstrate a commitment to maintaining their occupational knowledge
 - be independent of the centres that they are verifying
 - hold an appropriate external verifier award.

March 2017

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Registered Office: 80 Strand, London WC2R 0RL.
VAT Reg No GB 278 537121