

Pearson Edexcel Level 2 NVQ Certificate in Marketing

Specification

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 2 Certificate in Marketing (QCF)

The QN remains the same.

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Summary of Pearson Edexcel Level 2 NVQ Certificate 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	Page 1
Definition of sizes of qualifications aligned to TQT	Page 2
TQT value added	Page 6
Guided learning definition updated	Page 12
QCF references removed from unit titles and unit levels in all units	Page 16-110

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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Introducing Pearson Edexcel NVQ qualifications

What are NVQ qualifications?

National Vocational Qualifications (NVQs) are work-based qualifications that give learners the opportunity to develop and demonstrate their competence in the area of work or job role to which the qualification relates.

NVQs are based on the National Occupational Standards (NOS) for the appropriate sector. NOS define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles. At Level 2 and above, these qualifications are recognised as the competence component of Apprenticeship Frameworks. Qualifications at Level 1 can be used in Traineeships, which are stepping-stones to Apprenticeship qualifications. NVQs qualifications can also be delivered as stand-alone for those who wish to take a work-based qualification.

NVQs qualifications are outcomes-based with no fixed learning programme – allowing flexible delivery that meets the individual learner’s needs. They are suitable for those in employment or those who are studying at college and have a part-time job or access to a substantial work placement so that they are able to demonstrate the competencies that are required for work.

Most learners will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment requirements/strategy for the sector. Colleges, training centres and/or employers can offer these qualifications provided they have access to appropriate physical and human resources.

Sizes of NVQ/Competence-based qualifications

For all regulated qualifications, Pearson specify a total number of hours that it is estimated learners will require 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, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions. In addition to guided learning, other required learning directed by tutors or assessors will include 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).

Qualification title covered by this specification

This specification gives you the information you need to offer the Pearson Edexcel Level 2 NVQ Certificate in Marketing:

Qualification title	Qualification Number (QN)	Accreditation start date
Pearson Edexcel Level 2 NVQ Certificate in Marketing	600/2933/X	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.

You should use the Qualification Number (QN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique unit reference number, which are listed in this specification.

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 2 NVQ Certificate in Marketing is a component of the Intermediate 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 market research assistants or events management assistants. They might be undertaking a range of activities which could include collecting market research data, analysing competitor activity, contributing to marketing campaigns, planning and organising an event or exhibition and using a range of digital technologies.

What is the aim of the qualification?

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

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 2 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 the Pearson Edexcel Level 3 NVQ Diploma in Marketing.

What is the qualification structure for the Pearson Edexcel Level 2 NVQ Certificate in Marketing?

The Total Qualification Time (TQT) for this qualification is 210.

The Guided Learning Hours (GLH) for this qualification are 129.

The learner must achieve a total of 21 credits as follows:

- 12 credits must be achieved from mandatory Group A
- a minimum of 3 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 6 credits can be achieved from Optional Group C
- **where unit numbers contain an asterisk, a barred combination exists (please see the table on page 5 for more information).**

Unit	Unit reference	Unit title	Credit	Level
Mandatory Group A				
1	F/502/9923	Collect and organise market research data	3	2
2	L/502/9925	Contribute to measuring the marketing response	4	2
3	Y/601/2474	Work with other people in a business environment	3	2
4	L/601/2469	Improve own performance in a business environment	2	2
Optional Group B				
5	J/502/9924	Contribute to conducting direct marketing campaigns	3	2
6	R/502/9926	Use digital and social media in marketing campaigns	2	2
7	Y/502/9927	Analyse competitor activity	3	3
8*	D/601/2508	Support the co-ordination of an event	3	2
Optional Group C				
9*	H/502/4553	Database software	3	1
10*	L/502/4630	Website software	3	1
11*	A/502/4395	Bespoke software	2	1
12*	K/502/4621	Presentation software	3	1
13*	A/502/4378	Using collaborative technologies	3	1
14*	Y/500/7295	Database software	6	2
15*	R/502/4631	Website software	4	2

Unit	Unit reference	Unit title	Credit	Level
Optional Group C				
16*	F/502/4396	Bespoke software	3	2
17*	M/502/4622	Presentation software	4	2
18*	F/502/4379	Using collaborative technologies	4	2
19	R/502/4628	Word processing software	4	2
20	T/601/1526	Develop customer relationships	6	2
21	M/601/2531	Design and produce documents in a business environment	4	3
22	R/601/2540	Plan and organise an event	4	3
23*	Y/601/2541	Co-ordinate an event	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 8: Support the co-ordination of an event	...is barred against...	Unit 23: Co-ordinate an event
Unit 9: Database software	...is barred against...	Unit 14: Database software
Unit 10: Website software	...is barred against...	Unit 15: Website software
Unit 11: Bespoke software	...is barred against...	Unit 16: Bespoke software
Unit 12: Presentation software	...is barred against...	Unit 17: Presentation software
Unit 13: Using collaborative technologies	...is barred against...	Unit 18: Using collaborative technologies
Unit 14: Database software	...is barred against...	Unit 16: 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 D*).

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 D*.
- 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 learners certificate
Unit reference number:					This code is a unique reference number for the unit.
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: Collect and organise market research data

Unit reference number: F/502/9923

Level: 2

Credit value: 3

Guided learning hours: 12

Unit summary

This unit is about collecting and organising market research data, and about using IT to manage its 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 collect market research data	1.1	Explain to research participants the purpose, use, timescale and level of confidentiality of the research		
		1.2	Use data collection techniques that are consistent with the research plan		
		1.3	Collect market research data within agreed timescales		
		1.4	Record data collected in accordance with the research plan		
		1.5	Adhere to organisational protocols and standards in the collection of market research data		
		1.6	Explain the difference between primary and secondary research		
2	Be able to organise market research data	2.1	Validate the accuracy of the data		
		2.2	Organise quantitative and qualitative data in accordance with the requirements of the research plan		
		2.3	Present the information in the agreed format		
		2.4	Explain the objectives of the research		
		2.5	Explain the strengths and weaknesses of a range of analytical methods		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to use IT to manage market research data	3.1 Maintain the currency, completeness and accuracy of market research files			
	3.2 Enhance or amend files for use in targeting, segmentation and campaigns			
	3.3 Explain the impact of poor market research data management on an organisation			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 2: Contribute to measuring the marketing response

Unit reference number: L/502/9925

Level: 2

Credit value: 4

Guided learning hours: 21

Unit summary

This unit is about being able to assess the effectiveness of marketing campaigns, and about the principles of measuring marketing responses.

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 present information on the effectiveness of marketing campaigns	1.1	Collect quantitative and qualitative information in accordance with the evaluation plan		
		1.2	Organise information to enable analysis in accordance with the evaluation plan		
		1.3	Analyse the quantity and quality of responses against agreed criteria in accordance with their role in the evaluation plan		
		1.4	Evaluate the effectiveness of the response device(s) against the campaign objectives and agreed success criteria		
		1.5	Present the information within the agreed timescale in accordance with the evaluation plan		
		1.6	Make recommendations for future improvements based on an analysis of the responses to the campaign		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Understand the principles of measuring marketing responses	2.1	Explain the strengths and limitations of the campaign type, materials and response devices used		
		2.2	Explain the importance of the campaign's response system to the achievement of the marketing plan		
		2.3	Describe the importance of planning in successful marketing campaigns		
		2.4	Describe the use of IT in capturing and interpreting response data		
		2.5	Explain the legal requirements relating to data capture and subsequent use		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 3: Work with other people in a business environment

Unit reference number: Y/601/2474

Level: 2

Credit value: 3

Guided learning hours: 10

Unit summary

This unit is about working within a team, sharing responsibility with others to make sure that a team can achieve agreed goals and objectives.

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.

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 your role fits with organisational values and practices	1.1	Describe the sector in which your organisation operates		
		1.2	Describe your organisation's missions and purpose		
		1.3	Compare your organisation to other types of organisation in your sector		
		1.4	Outline your responsibilities		
		1.5	Describe how your role fits into your organisation's structure		
		1.6	Describe how your role contributes to the organisation's operations		
		1.7	Outline the policies, procedures, systems and values of your organisation that are relevant to your role		
		1.8	Outline who you would consult if unsure about organisational policies, procedures, systems and values		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Understand how to work as part of a team to achieve goals and objectives	2.1	Explain the purpose of working with other people to achieve goals and objectives		
		2.2	Identify situations in which working with others can achieve positive results		
		2.3	Explain the purpose and benefits of agreeing work goals and plans when working with others		
		2.4	Describe situations in which team members might support each other		
		2.5	Describe ways of providing support to other people in a team		
		2.6	Explain the purpose of agreeing quality measures with a team		
3	Understand how to communicate as part of a team	3.1	Explain the purpose of communicating with other people in a team		
		3.2	Identify different methods of communication and when to use them		
4	Understand the contribution of individuals within a team	4.1	Explain the purpose of recognising the strengths of others		
		4.2	Explain the value of diversity within teams		
		4.3	Explain the purpose of respecting individuals working within a team		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
5	Understand how to deal with problems and disagreements	5.1 Describe the types of problems and disagreements that may occur when working with other people in a team			
		5.2 Describe ways of dealing with problems and disagreements when working with other people in a team			
6	Understand the purpose of feedback when working as a team	6.1 Explain the purpose of giving and receiving constructive feedback			
		6.2 Describe ways of using feedback to improve own work, and a team as a whole			
7	Be able to work in a way that fits with organisational values and practices	7.1 Follow organisational policies, systems and procedures relevant to your role			
		7.2 Apply relevant organisational values across all aspects of your work			
		7.3 Work with outside organisations and individuals in a way that protects the image of your organisation, when relevant			
		7.4 Seek guidance when unsure about organisational policies, systems, procedures and values			

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
8	Be able to work in a team to achieve goals and objectives	8.1	Communicate effectively with other people in a team		
		8.2	Contribute to the agreement of work objectives and quality measures with a team, to achieve a positive outcome		
		8.3	Make sure work goals and objectives are achieved in a way that makes best use of own abilities in a team		
		8.4	Provide support to members of a team, if required		
		8.5	Show respect for individuals in a team		
		8.6	Make sure own work meets agreed quality standards and is on time		
9	Be able to deal with or refer problems in a team	9.1	Identify problem(s) or disagreement(s) in a team		
		9.2	Resolve problem(s) or disagreement(s) within limits of own authority and experience		
		9.3	Refer problems, as required		
10	Be able to use feedback on objectives in a team	10.1	Contribute to providing constructive feedback on the achievement of objectives to a team		
		10.2	Receive constructive feedback on own work		
		10.3	Use feedback on achievement of objectives to identify improvements in own work		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 4: Improve own performance in a business environment

Unit reference number: L/601/2469

Level: 2

Credit value: 2

Guided learning hours: 6

Unit summary

This unit is about identifying way of improving performance at work by encouraging feedback from others and maintaining a learning plan to record new learning and career opportunities.

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.

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 improve own performance	1.1	Explain the purpose and benefits of continuously improving performance at work		
		1.2	Explain the purpose and benefits of encouraging and accepting feedback from others		
		1.3	Explain how learning and development can improve own work, benefit organisations, and identify career options		
		1.4	Describe possible career progression routes		
		1.5	Describe possible development opportunities		
2	Be able to improve own performance using feedback	2.1	Encourage and accept feedback from other people		
		2.2	Use feedback to agree ways to improve own performance in the workplace		
		2.3	Complete work tasks, using feedback given, to improve performance		
3	Be able to agree own development needs using a learning plan	3.1	Investigate and agree where further learning and development may improve own work performance		
		3.2	Confirm learning plan changes		
		3.3	Follow a learning plan		
		3.4	Review progress against learning plan and agree further learning updates, if required		

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 5: Contribute to conducting direct marketing campaigns

Unit reference number: J/502/9924

Level: 2

Credit value: 3

Guided learning hours: 12

Unit summary

This unit is about being able to plan and conduct direct marketing campaigns.

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 planning of direct marketing campaigns	1.1	Agree materials that convey the marketing proposition and which comply with agreed quality and legal requirements		
		1.2	Identify the nature and location of target customers		
		1.3	Describe how their role contributes to the direct marketing campaign plan		
		1.4	Describe the objectives and target customers of the direct marketing campaign		
		1.5	Describe sources that would provide information about the nature and location of target customer groups		
		1.6	Explain how to reach target customers in accordance with the campaign plan		
		1.7	Explain the requirements of a data collection and reporting system that is capable of capturing the information required by the campaign plan		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
2	Be able to conduct direct marketing campaigns	2.1	Ensure that the team is briefed on the objectives, actions and required standards of the campaign		
		2.2	Ensure that direct marketing materials are distributed in accordance with the campaign plan		
		2.3	Provide progress and variance reports in accordance with the campaign plan		
		2.4	Ensure that the direct marketing campaign is conducted in accordance with legal, regulatory and industry requirements and standards		
		2.5	Explain the importance of briefing the team on the campaign requirements		
		2.6	Explain the importance of briefing the team on the campaign requirements		
		2.7	Explain how to address problems in accordance with the campaign plan		

Learner name: _____

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Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 6: 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: _____

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(if sampled)

Unit 7: 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: _____

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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 8: Support the co-ordination of an event

Unit reference number: D/601/2508

Level: 2

Credit value: 3

Guided learning hours: 20

Unit summary

This unit is about supporting the co-ordination and delivery of an event.

Barred combinations

This unit cannot be taken with *Unit 23: 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 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 and purpose of supporting the co-ordination of an event	1.1	Describe the range of support activities that may be required when supporting the co-ordination of an event		
		1.2	Identify the responsibilities involved in supporting the co-ordination of an event		
		1.3	Describe the types of problems that may occur during events and how to deal with these		
		1.4	Describe the points to observe when clearing and vacating an event		
		1.5	Describe the types of follow-up activities that may be required to carry out the co-ordination of an event		
2	Be able to support the co-ordination of an event	2.1	Contribute to the co-ordination of an event by: <ul style="list-style-type: none"> a) meeting the objectives of the event a) preparing the venue and making sure all necessary resources and supporting activities are in place b) arranging resources during an event, in line with agreed plans c) helping delegates to feel welcome d) meeting delegates' needs throughout an event 		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	e) resolving or referring problems, as required f) liaising with the management of the venue to make sure facility resources are in place g) clearing, and vacating the venue according to the terms of the contract h) preparing and circulating papers, or completing other follow-up actions following the event, if required			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 9: Database software

Unit reference number:	H/502/4553
Level:	1
Credit value:	3
Guided learning hours:	20

Unit summary

This unit is about the skills and knowledge an IT user needs to use database software tools and techniques to:

- enter straightforward or routine information into a database
- set up a single table in a flat file database
- retrieve information by running routine queries
- produce reports using predefined menus or short cuts.

The structure and functionality of the database will be predefined. Any aspects that are unfamiliar will require support and advice from others.

Database tools and techniques will be described as 'basic' because:

- the tools and functions will be predefined or commonly used
- the techniques for inputting, manipulation and outputting will be straightforward or routine.

Barred combinations

This unit cannot be taken with *Unit 14: Database software (Y/500/7295)*.

Relationship with other qualifications

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

- Pearson BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson BTEC Level 2 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	Enter, edit and organise structured information in a database	1.1	Identify the main components of a database		
		1.2	Create a database table for a purpose using specified fields		
		1.3	Enter structured data into records to meet requirements		
		1.4	Locate and amend data records		
		1.5	Respond appropriately to data entry error messages		
		1.6	Check data meets needs, using IT tools and making corrections as necessary		
2	Use database software tools to extract information and produce reports	2.1	Identify queries which meet information requirements		
		2.2	Run simple database queries		
		2.3	Identify reports which meet information requirements		
		2.4	Generate and print pre-defined database reports		

Learner name: _____

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Assessor signature: _____

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Date: _____

(if sampled)

Unit 10: Website software

Unit reference number: L/502/4630

Level: 1

Credit value: 3

Guided learning hours: 20

Unit summary

This unit is about the skills and knowledge an IT user needs to use basic website software tools and techniques appropriately to produce straightforward or routine single web pages from pre-set templates. Any aspect that is unfamiliar will require support and advice from others.

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

- the software tools and functions involved will be predefined or commonly used
- the range of inputting, manipulation and outputting techniques are straightforward or routine
- the template used for the content will be predetermined or familiar.

Barred combinations

This unit cannot be taken with *Unit 15: 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 BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson BTEC Level 2 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 Edexcel standards verifiers.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Plan and create web pages	1.1 Identify what content and layout will be needed in the web page			
	1.2 Identify the purpose of the webpage and intended audience			
	1.3 Select and use a website design template to create a single web page			
	1.4 Enter or insert content for web pages so that it is ready for editing and formatting			
	1.5 Organise and combine information needed for web pages			
	1.6 Identify copyright and other constraints on using others' information			
	1.7 Identify what file types to use for saving content			
	1.8 Store and retrieve web files effectively, in line with local guidelines and conventions where available			
2 Use website software tools to structure and format web pages	2.1 Identify what editing and formatting to use to aid both clarity and navigation			
	2.2 Select and use website features to help the user navigate simple websites			
	2.3 Use appropriate editing and formatting techniques			
	2.4 Check web pages meet needs, using IT tools and making corrections as necessary			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Publish web pages to the Internet or an intranet	3.1 Upload content to a website			
	3.2 Respond appropriately to common problems when testing a web page			

Learner name: _____

Date: _____

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Assessor signature: _____

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Internal verifier signature: _____

Date: _____

(if sampled)

Unit 11: **Bespoke software**

Unit reference number: A/502/4395

Level: 1

Credit value: 2

Guided learning hours: 15

Unit summary

This unit is about the skills and knowledge an IT User needs to use basic bespoke software tools and techniques appropriately for straightforward or routine information. Any aspect that is unfamiliar will require support and advice from others.

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

- the software tools and functions involved will be pre-defined or commonly used
- the range of inputting, manipulation and outputting techniques are straightforward or routine
- the data type and structure will be predetermined or familiar.

Barred combinations

This unit cannot be taken with *Unit 16: Bespoke software (F/502/4396)*.

Relationship with other qualifications

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

- Pearson BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson BTEC Level 2 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, organise and combine information using bespoke software	1.1	Input relevant information accurately into existing templates and/or files so that it is ready for processing		
		1.2	Organise and combine information of different forms or from different sources		
		1.3	Follow local and/or legal guidelines for the storage and use of data where available		
		1.4	Respond appropriately to data entry error messages		
2	Use tools and techniques to edit, process, format and present information	2.1	Use appropriate tools and techniques to edit, process and format information		
		2.2	Check information meets needs, using IT tools and making corrections as appropriate		
		2.3	Use appropriate presentation methods and accepted layouts		

Learner name: _____

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(if sampled)

Unit 12: Presentation software

Unit reference number:	K/502/4621
Level:	1
Credit value:	3
Guided learning hours:	20

Unit summary

This unit is about the skills and knowledge an IT user needs to use a range of basic presentation software tools and techniques to produce straightforward or routine presentations which include a combination of media (such as images, animation and sound) for education, entertainment or information sharing.

Any aspect that is unfamiliar will require support and advice from others. Presentation tools and techniques at this level are described as 'basic' because:

- the software tools and functions will be predefined or commonly used
- the range of entry, manipulation and outputting techniques will be straightforward or routine
- the inputting, manipulating and outputting of the information will be predetermined, straightforward or routine.

Barred combinations

This unit cannot be taken with *Unit 17: 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 BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson BTEC Level 2 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 Identify what types of information are required for the presentation			
	1.2 Select and use different slide layouts as appropriate for different types of information			
	1.3 Enter information into presentation slides so that it is ready for editing and formatting			
	1.4 Identify any constraints which may affect the presentation			
	1.5 Combine information of different forms or from different sources for presentations			
	1.6 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 slides	2.1 Identify what slide structure to use			
	2.2 Select and use an appropriate template to structure slides			
	2.3 Select and use appropriate techniques to edit slides			
	2.4 Select and use appropriate techniques to format slides			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Prepare slides for presentation to meet needs	3.1 Identify how to present slides to meet needs and communicate effectively			
	3.2 Prepare slides for presentation			
	3.3 Check presentation meets needs, using IT tools and making corrections as necessary			

Learner name: _____

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(if sampled)

Unit 13: Using collaborative technologies

Unit reference number: A/502/4378

Level: 1

Credit value: 3

Guided learning hours: 20

Unit summary

This unit is about the skills and knowledge to safely use IT tools and devices to work collaboratively by:

- preparing and accessing IT tools and devices, 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
- playing a responsible and active role in real-time communication
- contributing relevant information.

Barred combinations

This unit cannot be taken with *Unit 18: 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 BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson BTEC Level 2 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 using collaborative technology	1.1	Follow guidelines for working with collaborative technology		
		1.2	Identify risks in using collaborative technology and why it is important to avoid them		
		1.3	Carry out straightforward checks on others' online identities and different types of information		
		1.4	Identify when and how to report online safety and security issues		
		1.5	Identify what methods are used to promote trust		
2	Set up and access IT tools and devices for collaborative working	2.1	Set up IT tools and devices that will enable you to contribute to collaborative work		
		2.2	Identify the purpose for using collaborative technologies and expected outcomes		
		2.3	Identify which collaborative technology tools and devices to use for different communication media		
		2.4	Identify what terms and conditions apply to using collaborative technologies		

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
3	Prepare collaborative technologies for use	3.1	Use given details to access collaborative technologies needed for a collaborative task		
		3.2	Adjust basic settings on collaborative technologies		
		3.3	Change the environment of collaborative technologies		
		3.4	Set up and use a data reader to feed information		
		3.5	Identify what and why permissions are set to allow others to access information		
4	Contribute to tasks using collaborative technologies	4.1	Contribute responsibly and actively to collaborative working		
		4.2	Contribute to producing and archiving the agreed outcome of collaborative working		
		4.3	Identify when there is a problem with collaborative technologies and where to get help		
		4.4	Respond to simple problems with collaborative technologies		

Learner name: _____

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(if sampled)

Unit 14: Database software

Unit reference number: Y/500/7295

Level: 2

Credit value: 6

Guided learning hours: 30

Unit summary

This unit is about the ability to use a software application (such as Microsoft Access, Sun Star Office, Apple Works, Filemaker Pro, similar packages or one built for an organisation) designed to organise and collate related information (for example storing addresses and phone numbers).

This involves:

- entering and retrieving information from databases (for example for names and addresses, stock control, time management or event management) by running simple queries
- producing reports (eg using menus or short cuts)
- modifying simple (eg single table, non-relational) databases, creating queries using multiple selection criteria and reports (eg about sales activities, order details or project management).

Barred combinations

This unit cannot be taken with *Unit 9: Database software (H/502/4553)* or *Unit 16: Bespoke software (F/502/4396)*.

Relationship with other qualifications

This unit can also be found in IT qualifications, for example Pearson BTEC Level 2 Diploma in ICT Professional Competence

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 use a database	1.1 Describe what types of information the database has been designed for			
	1.2 Describe what types of design content are stored within the database			
	1.3 Identify what characteristics in a database fields may have, such as data type, field name, field size and field format			
	1.4 Describe how field characteristics can contribute to data validation			
	1.5 Describe why you would use a form for entering data into a database			
	1.6 Describe how to find and retrieve information from a database			
	1.7 Describe how data is structured in a simple (eg single-table, non-relational) database			
	1.8 Describe why it is important to maintain data integrity and what methods should be used to maintain data integrity in a simple (eg single-table, non-relational) database			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Use a database	2.1 Use techniques for entering data into databases			
	2.2 Create fields for entering data with the required field characteristics, name, type, size and format.			
	2.3 Modifying field characteristics within a simple (eg single-table, non-relational) database while maintaining the integrity of existing data, such as name, type and size			
	2.4 Check data in databases.			
	2.5 Using automated facilities for checking data and reports (eg spellchecking and sorting data)			
	2.6 Carry out types of queries			
	2.7 Produce and format reports			
	2.8 Improving efficiency (eg setting up short cuts)			

Learner name: _____

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Assessor signature: _____

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Date: _____

(if sampled)

Unit 15: 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 10: Website software (L/502/4630)*.

Relationship with other qualifications

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

- Pearson BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson 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 16: **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 an IT user needs 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 11: Bespoke software (A/502/4395)* or *Unit 14: Database software (Y/500/7295)*.

Relationship with other qualifications

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

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

Unit 17: 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 12: Presentation software (K/502/4621)*.

Relationship with other qualifications

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

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

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
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: _____
(if sampled)

Date: _____

Unit 18: 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 needed 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 13: Using collaborative technologies* (A/502/4378).

Relationship with other qualifications

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

- Pearson BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson 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		
		2.5	Describe the compatibility issues in different combinations of collaborative tools and devices		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	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			
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			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	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 19: Word processing software

Unit reference number: R/502/4628

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 range of intermediate word processing software tools and techniques to produce documents that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Word processing tools and techniques will be described as 'intermediate' because:

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

Relationship with other qualifications

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

- Pearson BTEC Level 1 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson BTEC Level 2 Award/Certificate/Diploma for IT Users (ITQ)
- Pearson 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	Enter and combine text and other information accurately within word processing documents	1.1	Identify what types of information are needed in documents		
		1.2	Use appropriate techniques to enter text and other information accurately and efficiently		
		1.3	Select and use appropriate templates for different purposes		
		1.4	Identify when and how to combine and merge information from other software or other documents		
		1.5	Select and use a range of editing tools to amend document content		
		1.6	Combine or merge information within a document from a range of sources		
		1.7	Store and retrieve document and template files effectively, in line with local guidelines and conventions where available		
2	Create and modify layout and structures for word processing documents	2.1	Identify the document requirements for structure and style		
		2.2	Identify what templates and styles are available and when to use them		
		2.3	Create and modify columns, tables and forms to organise information		
		2.4	Select and apply styles to text		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Use word processing software tools to format and present documents effectively to meet requirements	3.1 Identify how the document should be formatted to aid meaning			
	3.2 Select and use appropriate techniques to format characters and paragraphs			
	3.3 Select and use appropriate page and section layouts to present and print documents			
	3.4 Describe any quality problems with documents			
	3.5 Check documents meet needs, using IT tools and making corrections as necessary			
	3.6 Respond appropriately to quality problems with documents so that outcomes meet needs			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 20: Develop customer relationships

Unit reference number: T/601/1526

Level: 2

Credit value: 6

Guided learning hours: 40

Unit summary

When the learner deals with their customers regularly, they want to make each occasion a good customer experience. The impression the learner creates and the way the service is delivered affects this in just the same way as when they deal with a customer only once. However, a longer-term relationship with a repeat customer also depends on building up their customer's confidence in the service that the learner offers. Loyalty and a long-term relationship rely on the customer having a realistic view of the organisation's service and being comfortable with it. The learner's customer will return to their organisation if they feel confident that they will receive excellent service because they have enjoyed good customer experiences with the learner before.

Relationship with National Occupational Standards and other qualifications

This unit is based on Unit D1 of the NOS for Customer Service, owned by the Council for Administration. This unit can also be found in other qualifications, for example:

- Pearson Level 2 NVQ Certificate in Customer Service
- Pearson Level 3 NVQ Diploma in Customer Service.

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.

- 1 The learner's evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation.
- 2 The learner may collect the evidence for the unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

- 3 The learner must provide evidence that shows they have done this over a sufficient period of time with different customers on different occasions for their assessor to be confident that they are competent.
- 4 The learner's communication with customers may be face to face, in writing, by telephone, text message, email, internet (including social networking), intranet or by any other method they would be expected to use within their job role.
- 5 The learner must provide evidence of taking actions to meet the needs and expectations of their customer and of their organisation:
 - a) without being asked by their customer
 - b) at their customer's request.
- 6 The learner must include evidence that they have balanced the needs of their customers and their organisation by:
 - a) making use of alternative products or services offered by the organisation
 - b) varying the service they would normally offer within organisational guidelines
 - c) saying 'no' to their customer and explaining the limits of their organisation's service offer.

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	Build their customer's confidence that the service they give will be excellent	1.1	Show that they behave assertively and professionally with customers		
		1.2	Allocate the time they take to deal with their customer following organisational guidelines		
		1.3	Reassure their customer that they are doing everything possible to keep the service promises made by the organisation		
2	Meet the expectations of their customers	2.1	Recognise when there may be a conflict between their customer's expectations and your organisation's service offer		
		2.2	Balance their customer's expectations with their organisation's service offer by offering an alternative or explaining the limits of the service offer		
		2.3	Work effectively with others to resolve any difficulties in meeting their customer's expectations		
3	Develop the long-term relationship between their customer and their organisation	3.1	Give additional help and information to their customer in response to customer questions and comments about their organisation's services or products		
		3.2	Discuss expectations with their customer and explain how these compare with their organisation's services or products		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.3 Advise others of feedback received from their customer			
	3.4 Identify new ways of helping customers based on the feedback customers have given them			
	3.5 Identify added value that their organisation could offer to long-term customers			
4 Know how to develop customer relationships	4.1 Describe their organisation's services or products			
	4.2 Explain the importance of customer retention			
	4.3 Explain how their own behaviour affects the behaviour of the customer			
	4.4 Describe how to behave assertively and professionally with customers			
	4.5 Describe how to defuse potentially stressful situations			
	4.6 Identify the limitations of their organisation's service offer			
	4.7 Compare how customer expectations may change as the customer deals with their organisation			
	4.8 Identify the cost and resource implications of an extension of the service offer to meet or exceed customer expectations			
	4.9 Explain the cost implications of bringing in new customers as opposed to retaining existing customers			
	4.10 Identify who to refer to when considering any variation to their organisation's service offer			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 21: Design and produce documents in a business environment

Unit reference number: M/601/2531

Level: 3

Credit value: 4

Guided learning hours: 25

Unit summary

This unit is about designing and preparing high quality and attractive documents to agreed layouts, formats and styles.

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 purpose and value of designing and producing high quality and attractive documents	1.1	Describe different types of documents that may be designed and produced and the different styles that could be used		
		1.2	Describe different formats in which text may be presented		
		1.3	Explain the purpose and benefits of designing and producing high quality and attractive documents		
2	Know the resources available to design and produce documents and how to use them	2.1	Describe the types of resources needed to design and produce high quality and attractive documents		
		2.2	Explain the purpose and benefits of using different types of resource to design and produce high quality and attractive documents		
		2.3	Describe different types of technology available for inputting, formatting and editing text, and their main features		
3	Understand the purpose and value of following procedures when designing and producing documents	3.1	Explain the value and benefits of agreeing the purpose, content, style, and deadlines for the design and production of documents		
		3.2	Describe ways of researching and organising content needed for documents		
		3.3	Describe ways of integrating and laying out text and non-text		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.4 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so			
	3.5 Explain the purpose of storing documents safely and securely, and ways of doing so			
	3.6 Explain the purpose of confidentiality and data protection when preparing documents			
	3.7 Explain the purpose and benefits of meeting deadlines			
4 Be able to design and produce documents to agreed specifications	4.1 Agree the purpose, content, style and deadlines for documents			
	4.2 Identify and prepare resources needed to design and produce documents			
	4.3 Research and organise the content required for documents			
	4.4 Make appropriate and efficient use of technology, as required			
	4.5 Design, format and produce documents to an agreed style			
	4.6 Integrate non-text objects into an agreed layout, if required			
	4.7 Check texts and objects for accuracy			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.8 Edit and correct texts and objects as required			
	4.9 Clarify document requirements, if necessary			
	4.10 Store documents safely and securely following organisational procedures			
	4.11 Present documents to the required format, and within the agreed deadlines			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____
(if sampled)

Date: _____

Unit 22: 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.

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			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	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 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 23: 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 event co-ordinator, and also about being able to co-ordinate an event.

Barred combinations

This unit cannot be taken with *Unit 8: Support the co-ordination of an event* (D/601/2508).

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 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			
	3.9 Arrange clearing, and vacating the venue according to the terms of the contract			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	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: _____
(if sampled)

Date: _____

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 (qualifications.pearson.com). You can request customised training through the website or by contacting one of our advisers in the Training from the 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.

Annexe A: Quality assurance

Key principles of quality assurance

- A centre delivering Pearson qualifications must be an 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 an 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 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 Pearson 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 Specific requirements apply to simulation carried out for *Unit 20: Develop customer relationships* as follows:
- Assessments must be carried out under realistic business pressures, using real customers and within a defined service offer.
 - All services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations.
 - Learners must be expected to achieve a volume of work comparable to normal business practices.
 - The range of services, products, tools, materials and equipment that learners use must be up to date and available. They must enable learners to meet the requirements of the unit.
 - Account must be taken of any legislation or regulations in relation to the type of work that is being carried out.
 - Learners must be given workplace responsibilities to enable them to meet the requirements of the customer service national occupational standards at Level 2.
 - Learners must show that their productivity reflects that found in the work situation being represented.
- 4.4 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.
- 4.5 Assessors should confirm with their internal verifier about the validity of any simulation scenario, prior to its use.
- 4.6 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

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

- 7.1 EVs 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 Edexcel'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.

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