

Candidate Logbook

SVQ

SVQ 2 in Team Leading at SCQF Level 5

October 2011



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Unit 11:	Resolve customer service problems	173
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Section 1:SVQ 2 in Team Leading at SCQF Level 5

Introduction

This document contains information specific to the Edexcel SVQ 2 in Team Leading at SCQF Level 5.

National Occupational Standards and SVQs

The standards, Assessment Strategy and qualification structures for the Edexcel SVQ 2 in Team Leading at SCQF Level 5 are overseen by the CfA. The SVQs have been developed from the National Occupational Standards.

The Edexcel SVQ 2 in Team Leading at SCQF Level 5 gives recognition of candidates' skills, knowledge and understanding. It allows candidates to gain a qualification in the workplace that relates to their job and promotes good working practice.

You can contact the Sector Skills Council (SSC) at:

CfA business skills @ work
6 Graphite Square, Vauxhall Walk, London SE11 5EE
Telephone: 0207 091 9620 Fax: 0207 091 7340
Email: info@cfa.uk.com

SVQs are designed to be assessed in the workplace, or in conditions resembling the workplace. However, simulation of real working practice is rarely permitted. Where this is allowed it will be shown in the individual units, within the standards that are in this logbook.

Simulation must be carried out in conditions resembling the workplace. These conditions are described as being a 'realistic working environment' (RWE).

Which SVQs in Team Leading and Management are available?

The following SVQs in Team Leading and Management are available:

SVQ 2 in Team Leading at SCQF 5

SVQ 3 in Management at SCQF 7

SVQ 4 in Management at SCQF 9

SVQ 5 in Management at SCQF 11

It is important that you select the most appropriate level related to your work role.

Who is this SVQ for?

The SVQ 2 in Team Leading at SCQF Level 5

Candidates can expect to be working as team leaders across a wide variety of areas, including NHS trusts, educational institutions, government departments and the private sector. There are four mandatory units at this level covering resource management, leadership, working with colleagues and health and safety, together with a choice of option units.

What progression opportunity does this SVQ offer me?

Candidates may progress within their own employment from supporting a team of people to a supervisory role. They can also progress to:

- the SVQ 3 in Management
- other level 2 qualifications, such as the Edexcel BTEC Level 2 Award in Team Leading (QCF)
- the Edexcel BTEC Level 3 Award/Certificate in Management (QCF)
- the Edexcel BTEC Level 3 Diploma/Extended Diploma in Business (Management) (QCF)

What is the structure of the SVQ 2 in Team Leading at SCQF Level 5?

To achieve the whole qualification at level 2, you must prove competence in four mandatory units and two optional units.

Mandatory units for the SVQ 2 in Team Leading at SCQF Level 5

You must achieve all of the units listed below:

Unit number	Unit code	Title	Unit credit	SCQF level
1	A1	Manage your own resources	7	6
2	D1	Develop productive working relationships with colleagues	9	6
3	D5	Allocate and check work in your team	12	5
4	E5	Ensure your own actions reduce risks to health and safety	4	5

Optional units for the SVQ 2 in Team Leading at SCQF Level 5

You must achieve two of the units listed below:

Unit number	Unit code	Title	Unit credit	SCQF level
5	B5	Provide leadership for your team	9	7
6	C1	Encourage innovation in your team	11	6
7	D8	Help team members address problems affecting their performance	5	6
8	D12	Participate in meetings	2	5
9	D14	Initiate and follow disciplinary procedure	6	6
10	D15	Initiate and follow grievance procedure	6	6
11	F5	Resolve customer service problems	6	5
12	F6	Monitor and solve customer service problems	6	6
13	F7	Support customer service improvements	5	5
14	F8	Work with others to improve customer service	8	6

Section 2: Examples of forms

Collecting your evidence

This section contains examples of the forms you, your assessor and the internal verifier will use while you are undertaking your SVQ2 in Team Leading at SCQF Level 5.

The forms are:

- Form 1: Portfolio title page
- Form 2: Personal profile
- Form 3: Contents checklist
- Form 4: Index of evidence
- Form 5: Unit assessment plan
- Form 6: Unit sign-off record
- Form 7: Work Log
- Form 8: Observation record
- Form 9: Witness testimony
- Form 10: Expert witness evidence record
- Form 11: Record of questions and candidate's answers

You should ask your assessor for further advice and support if you are still unsure about how to use the forms and who should complete them.

Example form 1 – Portfolio title page

Name:	
Job title:	
Name of employer/training provider/college:	
Their address:	
Postcode:	
Telephone number (Home):	(Work):
Email address:	Fax number:
SVQ:	
Level:	
Units submitted for assessment:	
Mentor/Supervisor:	
(Please provide details of mentor's/supervisor's experience):	
Assessor:	Date:

Example form 2 – Personal profile

Name:	
Address:	
Postcode:	
Telephone number (Home):	(Work):
Email address:	Fax number:
Job title:	
Relevant experience	
Description of your current job:	
Previous work experience or attach copy of a current CV:	
Qualifications and training and/or attach copy of a current CV:	

continued overleaf...

Voluntary work/interests:

Name of employer/training provider/college:

Address:

Postcode:

Telephone number (work):

Fax number:

Email address:

Type of business, if employer:

Number of staff:

Structure of organisation (including chart or diagram if available):

Example form 3 – Contents checklist

SVQ title:		
Candidate:		
	Completed?	Page/section number
Title page for the portfolio		
Personal profile <ul style="list-style-type: none"> • your own personal details • a brief CV or career profile • description of your job • information about your employer/training provider/college 		
Summary of the units		
Completed units <ul style="list-style-type: none"> • signed by yourself, your assessor and the internal verifier (where relevant) • reference numbers included • unit assessment plans 		
Unit progress records		
Index of evidence (with cross-referencing information completed)		
Evidence (with reference numbers) <ul style="list-style-type: none"> • observation records • details of witnesses (witness testimony sheets) • personal statements 		

Example form 5 – Unit assessment plan

SVQ title:				
Unit:				
Candidate:			Assessor:	
Normal working activities performed				
	TYPICAL EVIDENCE	WORK AREA	EXPECTED COMPLETION DATE	LINKS TO OTHER UNITS/ELEMENTS
ELEMENT:				
ELEMENT:				
ELEMENT:				
Activities needing to be performed				
ELEMENT:				
ELEMENT:				
ELEMENT:				
Additional comments				
Assessor's signature:			Date:	
Candidate's signature:			Date:	

Example form 7 – Work Log

SVQ title and level:				
Unit/element(s):				
Candidate:				
Purpose of statement:				
Evidence index number:				
Date	Evidence index number	Details of statement	Links to other evidence <i>(enter numbers)</i>	Units, elements and PCs covered
Candidate's signature:			Date:	
Assessor's signature:			Date:	

Example form 8 – Observation record

SVQ title and level:	
Unit/element(s):	
Candidate:	Date of observation:
Evidence index number:	
Skills/activities observed:	PCs and range covered:
Knowledge and understanding apparent from this observation:	
Other units/elements to which this evidence may contribute:	
Assessor comments and feedback to candidate:	
I can confirm the candidate's performance was satisfactory.	
Assessor's signature:	Date:
Candidate's signature:	Date:

Example form 9 – Witness testimony

SVQ title and level:	
Candidate name:	
Evidence index number:	
Where applicable, evidence number to which this testimony relates:	
Unit:	
Element(s):	
Range:	
Date of evidence:	
Witness name:	
Relationship to candidate:	
Details of testimony:	
I can confirm the candidate's evidence is authentic and accurate.	
Witness signature:	
Name:	Date:
Contact telephone number:	
<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
<input type="checkbox"/>	FAMILIAR WITH THE SVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING

Example form 10 – Expert witness evidence record

SVQ title and level:	
Candidate name:	
Evidence index number:	
Where applicable, evidence number to which this testimony relates:	
Unit:	
Element(s):	
Date of evidence:	
Expert witness name:	
Relationship to candidate:	
Details of testimony:	
I can confirm the candidate's evidence is authentic and accurate.	
Expert witness signature:	
Name:	Date:
Contact telephone number:	

Please tick (✓) the appropriate box.

<input type="checkbox"/>	QUALIFIED AS AN ASSESSOR FOR WORKPLACE PERFORMANCE
<input type="checkbox"/>	RELEVANT PROFESSIONAL WORK ROLE THAT INVOLVES EVALUATING EVERYDAY STAFF PRACTICE
<input type="checkbox"/>	CURRENT EXPERTISE
<input type="checkbox"/>	FAMILIAR WITH THE SVQ STANDARDS TO WHICH THE CANDIDATE IS WORKING

Example form 11 – Record of questions and candidate’s answers

SVQ title and level:	
Candidate name:	
Unit:	Element(s):
Evidence index number:	
Circumstances of assessment:	
List of questions and candidate’s responses:	
Q:	
A:	
Q:	
A:	
Assessor’s signature:	Date:
Candidate’s signature:	Date:

Section 3: Logbook

	Page number
Mandatory units	31
Unit 1: Manage your own resources	33
Unit 2: Develop productive working relationships with colleagues	45
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Unit 4: Ensure your own actions reduce risks to health and safety	73
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Mandatory units

Unit 1: Manage your own resources

Unit code: A1

Unit credit: 7

Unit level: 6

Introduction

What this unit is about

This unit is mainly about making sure you have the personal resources (particularly knowledge, understanding, skills and time) to undertake your work role, and reviewing your performance against agreed objectives. It also covers identifying and undertaking where gaps have been identified.

Who is the unit for?

The unit is recommended for team leaders.

Links to other units

This unit is linked to unit **A2: Manage your own resources and professional development** in the overall suite of National Occupational Standards for Management and Leadership.

Skills

Listed below are the main generic 'skills' that need to be applied in managing your own resources. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Setting objectives
- Communicating
- Planning
- Time management
- Evaluating
- Reviewing
- Learning
- Obtaining feedback
- Self-assessment

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 Why managing your resources (particularly knowledge, understanding, skills and time) is important. 2 How to identify the requirements of a work role. 3 How to set work objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound). 4 How to measure progress against work objectives. 5 How to identify development needs to address any identified gaps between the requirements of your work role and your current knowledge, understanding and skills. 6 What an effective development plan should contain. 7 The type of development activities that can be undertaken to address identified gaps in knowledge, understanding and skills. 8 How to identify whether/how development activities have contributed to your performance. 9 How to get and make effective use of feedback on your performance. 10 How to update work objectives and development plans in the light of performance, feedback received, any development activities undertaken and any wider changes. 11 How to record the use of your time and identify possible improvements. 		

Industry/sector specific knowledge and understanding		
1	Industry/sector requirements for the development or maintenance of knowledge, understanding and skills	
Context specific knowledge and understanding		
1	The agreed requirements of your work role including the limits of your responsibilities.	
2	Your agreed personal work objectives.	
3	The reporting lines in your organisation.	
4	Your current knowledge, understanding and skills.	
5	Identified gaps in your current knowledge, understanding and skills.	
6	Your personal development plan.	
7	Your organisation's policy and procedures in terms of personal development.	
8	Available development opportunities and resources in your organisation.	
9	Possible sources of feedback in your organisation.	

Additional evidence (if applicable):

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	O = DIRECT OBSERVATION OF THE LEARNER'S PERFORMANCE BY THEIR ASSESSOR	PD = PROFESSIONAL DISCUSSION
COLUMN KEY:	Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING	A = ASSIGNMENT, PROJECT/CASE STUDIES
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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____	Date: _____
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I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____	Date: _____
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Countersigning assessor signature (if applicable): _____	Date: _____
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I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____	Date: _____
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Countersigning internal verifier (if applicable): _____	Date: _____
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Unit 1 (A1): Manage your own resources

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Identify and agree the requirements of your work role with those you report to.						
2 Discuss and agree personal work objectives with those you report to and how you will measure progress.						
3 Identify any gaps between the requirements of your work role and your current knowledge, understanding and skills.						
4 Discuss and agree, with those you report to, a development plan to address any identified gaps in your current knowledge, understanding and skills.						
5 Undertake the activities identified in your development plan and discuss, with those you report to, how they have contributed to your performance.						
6 Get regular and useful feedback on your performance from those who are in a good position to judge it and provide you with objective and valid feedback.						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
7 Discuss and agree, with those you report to, any changes to your personal work objectives and development plan in the light of performance, feedback received, any development activities undertaken and any wider changes.						
8 Check, on a regular basis, how you are using your time at work and identify possible improvements.						
9 Ensure that your performance consistently meets or goes beyond agreed requirements.						

Additional evidence (if applicable):

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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____	Date: _____
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I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____	Date: _____
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Countersigning assessor signature (if applicable): _____	Date: _____
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I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____	Date: _____
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Countersigning internal verifier (if applicable): _____	Date: _____
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Unit 1 (A1): Manage your own resources

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
1 You recognise changes in circumstances promptly and adjust plans and activities accordingly.						
2 You prioritise objectives and plan work to make best use of time and resources.						
3 You take personal responsibility for making things happen.						
4 You take pride in delivering high quality work.						
5 You agree achievable objectives for yourself and give a consistent and reliable performance.						
6 You find practical ways to overcome barriers.						
7 You make best use of available resources and seek new sources of support when necessary.						

Additional evidence (if applicable):

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Internal verifier signature: _____	Date: _____
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Countersigning internal verifier (if applicable): _____	Date: _____
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Unit 2: Develop productive working relationships with colleagues

Unit code:	D1
Unit credit:	9
Unit level:	6

Introduction

What this unit is about

This unit is about developing working relationships with colleagues, within your own organisation and within other organisations, that are productive in terms of supporting and delivering your work and that of the overall organisation.

‘Colleagues’ are any people you are expected to work with, whether they are at a similar position or in other positions, including your manager.

Who is the unit for?

The unit is recommended for team leaders and first line managers.

Links to other units

This unit is linked to all other units in the overall suite of National Occupational Standards for Management and Leadership where developing productive relationships with colleagues may be required.

Skills

Listed below are the main generic ‘skills’ that need to be applied in developing productive working relationships with colleagues. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Communicating
- Managing conflict
- Empathising
- Networking
- Information management
- Leading by example
- Valuing and supporting others
- Involving others
- Providing feedback
- Obtaining feedback
- Stress management
- Prioritising

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 The benefits of developing productive working relationships with colleagues. 2 The importance of creating an environment of trust and mutual respect where you have no authority, or shared authority, over those you are working with. 3 The importance of understanding difficult situations and issues from your colleague's perspective and providing support, where necessary, to move things forward. 4 Principles of effective communication and how to apply them in order to communicate effectively with colleagues. 5 How to identify disagreements with colleagues and the techniques for sorting them out. 6 How to identify conflicts of interest with colleagues and the measures that can be used to manage or remove them. 7 How to take account of diversity and inclusion issues when developing working relationships with colleagues. 8 The importance of exchanging information and resources with colleagues. 9 How to get and make use of feedback on your performance from colleagues. 10 How to provide colleagues with useful feedback on their performance. 		

Industry/sector specific knowledge and understanding	
1	Regulations and codes of practice that apply in the industry or sector.
2	Standards of behaviour and performance in the industry or sector.
3	Working culture of the industry or sector.
Context specific knowledge and understanding	
1	Current and future work being carried out.
2	Colleagues who are relevant to the work being carried out, their work roles and responsibilities.
3	Processes within the organisation for making decisions.
4	Line management responsibilities and relationships within the organisation.
5	The organisation's values and culture.
6	Power, influence and politics within the organisation.
7	Standards of behaviour and performance expected in the organisation.
8	Information and resources that different colleagues might need.
9	Agreements with colleagues.

Additional evidence (if applicable):

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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____	Date: _____
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I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____	Date: _____
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Countersigning assessor signature (if applicable): _____	Date: _____
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I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____	Date: _____
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Countersigning internal verifier (if applicable): _____	Date: _____
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Unit 2 (D1): Develop productive working relationships with colleagues

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Establish working relationships with all colleagues who are relevant to the work being carried out.						
2 Recognise, agree and respect the roles and responsibilities of colleagues and, particularly in situations of matrix management, their managers' requirements.						
3 Understand and take account of the priorities, expectations and authority of colleagues in decisions and actions.						
4 Create an environment of trust and mutual respect where you have no authority, or shared authority, over those you are working with.						
5 Understand difficult situations and issues from your colleague's perspective and provide support, where necessary, to move things forward.						
6 Fulfil agreements made with colleagues and let them know.						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
7 Advise colleagues promptly of any difficulties or where it will be impossible to fulfil agreements.						
8 Identify and sort out conflicts of interest and disagreements with colleagues in ways that minimise damage to work being carried out.						
9 Exchange information and resources with colleagues to make sure that all parties can work effectively.						
10 Provide feedback to colleagues on their performance and seek feedback from colleagues on your own performance in order to identify areas for improvement.						

Additional evidence (if applicable):

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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational Standards.

Candidate signature: _____	Date: _____
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I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____	Date: _____
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Countersigning assessor signature (if applicable): _____	Date: _____
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I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

Internal verifier signature: _____	Date: _____
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Countersigning internal verifier (if applicable): _____	Date: _____
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Unit 2 (D1): Develop productive working relationships with colleagues

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
1 You present information clearly, concisely, accurately and in ways that promote understanding.						
2 You seek to understand people's needs and motivations.						
3 You make time available to support others.						
4 You clearly agree what is expected of others and hold them to account.						
5 You work to develop an atmosphere of professionalism and mutual support.						
6 You model behaviour that shows respect, helpfulness and co-operation.						

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
7 You keep promises and honour commitments.						
8 You consider the impact of your own actions on others.						
9 You say no to unreasonable requests.						
10 You show respect for the views and actions of others.						

Additional evidence (if applicable):

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	S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY	RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING

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Candidate signature: _____	Date: _____
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I confirm that the candidate has achieved all the requirements of this Unit.

Assessor signature: _____	Date: _____
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Unit 3: Allocate and check work in your team

Unit code: D5

Unit credit: 12

Unit level: 5

Introduction

What this unit is about

This unit is about ensuring that the work required of your team is effectively and fairly allocated amongst team members. It also involves checking on the progress and quality of the work of team members to ensure that the required level or standard or performance is being met.

Who is the unit for?

The unit is recommended for team leaders.

Links to other units

This unit is linked to units **B5: Provide leadership for your team**, **D1: Develop productive working relationships with colleagues**, **D6: Allocate and monitor the progress and quality of work in your area of responsibility**, **D7: Provide learning opportunities for colleagues** and **D8: Help team members address problems affecting their performance** in the overall suite of National Occupational Standards for Management and Leadership.

Skills

Listed below are the main generic 'skills' that need to be applied in allocating and checking work in your team. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Communicating
- Providing feedback
- Planning
- Reviewing
- Motivating
- Valuing and supporting others
- Problem-solving
- Monitoring
- Decision-making
- Prioritising
- Team-building
- Managing conflict
- Information management
- Leadership
- Coaching
- Delegating
- Setting objectives
- Stress management

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 Different ways of communicating effectively with members of a team. 2 The importance of confirming/clarifying the work required of the team with your manager and how to do this effectively. 3 How to plan the work of a team, including how to identify any priorities or critical activities and the available resources. 4 How to identify sustainable resources and ensure their effective use when planning the work of a team. 5 How to identify and take due account of health and safety issues in the planning, allocation and checking of work. 6 Why it is important to allocate work across the team on a fair basis and how to do so. 7 Why it is important to brief team members on the work they have been allocated and the standard or level of expected performance and how to do so. 8 The values, ethics, beliefs, faith, cultural conventions, perceptions and expectations of any team members from a different country or culture and how your own values, ethics, beliefs, faith, cultural conventions, perceptions, expectations, use of language, tone of voice and body language may appear to them. 9 Ways of encouraging team members to ask questions and/or seek clarification and make suggestions in relation to the work which they have been allocated. 10 Effective ways of regularly and fairly checking the progress and quality of the work of team members. 		

<p>General knowledge and understanding</p>	
<p>11 How to provide prompt and constructive feedback to team members.</p> <p>12 How to select and apply a limited range of different methods for motivating, supporting and encouraging team members to complete the work they have been allocated and improve their performance, and for recognising their achievements.</p> <p>13 The additional support and/or resources which team members might require to help them complete their work and how to assist in providing this.</p>	
<p>Industry/sector specific knowledge and understanding</p>	
<p>1 Industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work.</p> <p>2 Industry/sector requirements for the development or maintenance of knowledge, understanding and skills.</p>	
<p>Context specific knowledge and understanding</p>	
<p>1 The members, purpose and objectives of your team.</p> <p>2 The work required of your team.</p> <p>3 The available resources for undertaking the required work.</p> <p>4 The organisation's written health and safety policy statement and associated information and requirements.</p> <p>5 Your team's plan for undertaking the required work.</p> <p>6 The skills, knowledge and understanding, experience and workloads of team members.</p> <p>7 Your organisation's policy and procedures in terms of personal development.</p> <p>8 Reporting lines in the organisation and the limits of your authority.</p> <p>9 Organisational standards or levels of expected performance.</p> <p>10 Organisational policies and procedures for dealing with poor performance.</p> <p>11 Organisational grievance and disciplinary policies and procedures.</p> <p>12 Organisational performance appraisal systems.</p>	

Additional evidence (if applicable):

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Unit 3 (D5): Allocate and check work in your team

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Confirm the work required of the team with your manager and seek clarification, where necessary, on any outstanding points and issues.						
2 Plan how the team will undertake its work, identifying any priorities or critical activities and making best use of the available resources.						
3 Allocate work to team members on a fair basis taking account of their skills, knowledge and understanding, experience and workloads and the opportunity for development.						
4 Brief team members on the work they have been allocated and the standard or level of expected performance.						
5 Recognise and seek to find out about differences in expectations and working methods of any team members from a different country or culture and promote ways of working that take account of their expectations and maximise productivity.						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
6 Encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated.						
7 Check the progress and quality of the work of team members on a regular and fair basis against the standard or level of expected performance and provide prompt and constructive feedback.						
8 Support team members in identifying and dealing with problems and unforeseen events.						
9 Motivate team members to complete the work they have been allocated and provide, where requested and where possible, any additional support and/or resources to help completion.						
10 Monitor the team for conflict, identifying the cause(s) when it occurs and dealing with it promptly and effectively.						
11 Identify unacceptable or poor performance, discuss the cause(s) and agree ways of improving performance with team members.						
12 Recognise successful completion of significant pieces of work or work activities by team members and the overall team and advise your manager.						
13 Use information collected on the performance of team members in any formal appraisal of performance.						

Additional evidence (if applicable):

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Unit 3 (D5): Allocate and check work in your team

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
1 You make time available to support others.						
2 You clearly agree what is expected of others and hold them to account.						
3 You prioritise objectives and plan work to make best use of time and resources.						
4 You state your own position and views clearly and confidently in conflict situations.						
5 You show integrity, fairness and consistency in decision-making.						
6 You seek to understand people's needs and motivations.						
7 You take pride in delivering high quality work.						
8 You take personal responsibility for making things happen.						

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
9 You encourage and support others to make the best use of their abilities.						
10 You are vigilant for possible risks and hazards.						

Additional evidence (if applicable):

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Unit 4: Ensure your own actions reduce risks to health and safety

Unit code: E5

Unit credit: 4

Unit level: 5

Introduction

This unit is for people with a role which involves:

- reviewing the workplace, activities and organisation to identify and evaluate the health and safety hazards to employees, other people who may be affected, and physical resources
- assessing the nature and extent of the hazards of the workplace, activities and organisation to determine the health and safety risks to employees, other people who may be affected, and physical resources
- determining relevant risk control measures and safe systems of work
prioritising risks
- prioritising risks
- implementing risk control measures
- making sure that the risk control measures meet health and safety statutory requirements and industry best practice

What some of the words in this unit mean

Control(s)	The means by which the risks identified are eliminated or reduced to acceptable levels.
Employer	Wherever/whoever has responsibility for the workplace/work activity.
Hazard*	<p>A hazard is something with the potential to cause harm (this can include articles, substances, plant or machines, methods of work, the working environment and other aspects of work management).</p> <p><i>* Definition taken from: HSE 'Management of health and safety at work - Approved Code of Practice & Guidance'. Reference L21 (ISBN 0-7176-2488-9)</i></p>
Learner	Any person in a workplace environment and undertaking learning, including those following a vocational or academic course.
Legislation	<p>The Health and Safety at Work Act 1974 is the main piece of legislation under which nearly all the other regulations are made. It is for this reason that only this piece of legislation is specifically referred to in this Unit.</p> <p>There is an array of health and safety regulations and codes of practice which affect people at work. There are regulations for those who, for example, work with electricity, or work on construction projects, as well as regulations covering noise at work, manual handling, working with VDUs, or dealing with substances hazardous to health, etc. The specific requirements for all or any of these can be obtained from HSE local offices.</p>
Other people	Refers to everyone covered by the Health and Safety at Work Act including: visitors, members of the public, colleagues, contractors, clients, customers, patients and students.
Personal presentation	This includes personal hygiene, use of personal protective equipment, clothing and accessories suitable to the particular workplace.
Physical resources	Property, equipment, plant and machinery, etc.

Risk*	<p>A risk is the likelihood of potential harm from that hazard being realised.</p> <p>The extent of the risk depends on:</p> <ol style="list-style-type: none"> the likelihood of that harm occurring; the potential severity of that harm, i.e. of any resultant injury or adverse health effect; and the population which might be affected by the hazard, i.e. the number of people who might be exposed. <p><i>* Definition taken from: HSE 'Management of health and safety at work - Approved Code of Practice & Guidance'. Reference L21 (ISBN 0-7176-2488-9)</i></p>
Resources	This includes: information, documentation, time, control measures, equipment and support (including specialist assistance).
Manager/Supervisor	One who controls and or directs the work of others.
Workplace	The single or multiple areas in which you carry out your work
Workplace Instructions/Policies & Procedures	An organisation's instructions, method statements, safe systems of work, guidelines and processes on how to behave and perform tasks in the workplace.
Policies	<ul style="list-style-type: none"> • A statement which directs the present and future decisions of an organisation. • It is intended to influence and determine decisions, actions, and other matters. • Typically, a policy designates a required process or procedure within an organisation. • They are often initiated because of some external requirement.

<p>Procedures</p>	<ul style="list-style-type: none"> • A series of steps following in a regular definite order that implements a policy. • A series of steps or instructions, describing a way of doing things. • A series of steps to be performed in a regular definite order under specified conditions. • Documented processes that are used when work affects more than one function or department of an organisation. • A series of clearly defined steps (and decisions) that explains or describes how one goes about completing a task. <p>This includes the documentation prepared by the employer about the procedures to be followed for health, safety and welfare matters.</p> <p>This may be the employer’s safety policy, general health and safety statements and written safety procedures covering aspects of the workplace that should be drawn to the attention of employees and that of everyone covered by the Health and Safety at Work etc. Act 1974 (visitors, members of the public, colleagues, contractors, clients, customers, patients, students).</p> <p>Instructions covering, for example:</p> <ol style="list-style-type: none"> a. the use of safe working methods and equipment b. the safe use of hazardous substances c. smoking, eating, drinking and drugs d. what to do in the event of an emergency e. personal presentation.
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What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>The nature and role of the identification of health and safety hazards within the organisation</p> <ol style="list-style-type: none"> 1 Health and safety hazards. 2 Risk assessment techniques. 3 Physical resources. 4 Instruments and survey techniques which may be used to determine the exposure of people who may be affected. 		
<p>Principles and concepts</p> <ol style="list-style-type: none"> 1 The analysis techniques suitable for determining risks. 		
<p>External factors influencing the identification of health and safety hazards</p> <ol style="list-style-type: none"> 1 Health and safety statutory requirements. 2 Tolerability/acceptability of risk. 3 Quality management requirements for documentation. 		
<p>The nature and role of health and safety risk control measures within the organisation</p> <ol style="list-style-type: none"> 1 Risk control measures, including safe systems of work. 		
<p>External factors influencing health and safety risk control methods</p> <ol style="list-style-type: none"> 1 Risk control hierarchies. 2 The risk control measures required by health and safety legislation and industry best practice. 		

Additional evidence (if applicable):

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Element 1: Identify and evaluate hazards to health and safety

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Inspect the workplace to identify and evaluate the hazards to the safety of the employees, other people who may be affected, and physical resources.						
2 Observe work activities to identify and evaluate the hazards to the safety of the employees, other people who may be affected, and physical resources.						
3 Examine proposed and new workplaces, equipment, processes or activities in order to identify and evaluate the hazards to the safety of the employees, other people who may be affected and physical resources.						
4 Inspect the workplace to identify and evaluate the hazards to the health of the employees and other people who may be affected.						
5 Observe work activities to identify and evaluate the hazards to the health of the employees and other people who may be affected.						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
6 Examine proposed and new workplaces, equipment, processes and activities in order to identify and evaluate the hazards to the health of the employees and other people who may be affected.						
7 Select and use appropriate measuring equipment.						
8 Keep appropriate records of the hazards.						

Additional evidence (if applicable):

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Element 2: Determine safety and health risks

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Determine risks to safety in the workplace to employees, other people who may be affected, and physical resources.						
2 Determine risks to health in the workplace to employees and other people who may be affected, taking into account existing control measures, the population at risk, the nature of the harm and the likelihood of the occurrence.						
3 Select and use suitable techniques to determine and analyse risks.						
4 Decide the tolerability and/or acceptability of risk.						
5 Select and use appropriate instruments and survey techniques to determine the exposure of employees and other people who may be affected.						
6 Keep appropriate records of the risks.						

Additional evidence (if applicable):

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Element 3: Determine and implement risk control measures and safe systems of work

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Identify and evaluate the existing risk control measures and current systems of work in your organisation.						
2 Recognise your own limits and, where necessary, bring in specialist or other assistance.						
3 Identify any additional or improved risk control measures that may be needed in your organisation.						
4 Identify and take into consideration the risk control measures required by health and safety statutory requirements relevant to your organisation and industry best practice.						
5 Involve managers, employee representatives and/or employees in consultation about the risk controls.						
6 Identify the resources needed, and cost- effectiveness, of the risk control measures needed.						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
7 Assist in the implementation of risk control measures in your organisation.						
8 Make sure that all those people affected receive the necessary training to gain the competence required for the implementation of risk control measures.						
9 Keep appropriate records of risk control measures.						

Additional evidence (if applicable):

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Optional units

Unit 5:	Provide leadership for your team
Unit code:	B5
Unit credit:	9
Unit level:	7

Introduction

What this unit is about

This unit is about providing direction to the members of your team and motivating and supporting them to achieve the objectives of the team and their personal work objectives.

Who is the unit for?

The unit is recommended for team leaders.

Links to other units

This unit is linked to units **B6: Provide leadership in your area of responsibility**, **C1: Encourage innovation in your team**, **D1: Develop productive working relationships with colleagues**, **D5: Allocate and check work in your team** and **D9: Build and manage teams** in the overall suite of National Occupational Standards for Management and Leadership.

Skills

Listed below are the main generic 'skills' that need to be applied in providing leadership for your team. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Communicating
- Planning
- Team-building
- Leading by example
- Providing feedback
- Setting objectives
- Motivating
- Consulting
- Problem-solving
- Valuing and supporting others
- Monitoring
- Managing conflict
- Decision-making
- Following

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 Different ways of communicating effectively with members of a team. 2 How to set objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound). 3 How to plan the achievement of team objectives and the importance of involving team members in this process. 4 The importance of and being able to show team members how personal work objectives contribute to achievement of team objectives. 5 That different styles of leadership exist. 6 How to select and successfully apply a limited range of different methods for motivating, supporting and encouraging team members and recognising their achievements. 7 Types of difficulties and challenges that may arise, including conflict, diversity and inclusion issues within the team, and ways of identifying and overcoming them. 8 The importance of encouraging others to take the lead and ways in which this can be achieved. 9 The benefits of and how to encourage and recognise creativity and innovation within a team. 		

Industry/sector specific knowledge and understanding		
1	Legal, regulatory and ethical requirements in the industry/sector.	
Context specific knowledge and understanding		
1	The members, purpose, objectives and plans of your team.	
2	The personal work objectives of members of your team.	
3	The types of support and advice that team members are likely to need and how to respond to these.	
4	Standards of performance for the work of your team.	

Additional evidence (if applicable):

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Unit 5 (B5): Provide leadership for your team

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Set out and positively communicate the purpose and objectives of the team to all members.						
2 Involve members in planning how the team will achieve its objectives.						
3 Ensure that each member of the team has personal work objectives and understands how achieving these will contribute to achievement of the team's objectives.						
4 Encourage and support team members to achieve their personal work objectives and those of the team and provide recognition when objectives have been achieved.						
5 Win, through your performance, the trust and support of the team for your leadership.						
6 Steer the team successfully through difficulties and challenges, including conflict, diversity and inclusion issues within the team.						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
7 Encourage and recognise creativity and innovation within the team.						
8 Give team members support and advice when they need it especially during periods of setback and change.						
9 Motivate team members to present their own ideas and listen to what they say.						
10 Encourage team members to take the lead when they have the knowledge and expertise and show willingness to follow this lead.						
11 Monitor activities and progress across the team without interfering.						

Additional evidence (if applicable):

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Unit 5 (B5): Provide leadership for your team

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
1 You create a sense of common purpose.						
2 You take personal responsibility for making things happen.						
3 You encourage and support others to take decisions autonomously.						
4 You act within the limits of your authority.						
5 You make time available to support others.						
6 You show integrity, fairness and consistency in decision-making.						
7 You seek to understand people's needs and motivations.						
8 You model behaviour that shows respect, helpfulness and co-operation.						

Additional evidence (if applicable):

<p>COLUMN KEY:</p>	<p>O = DIRECT OBSERVATION OF THE LEARNER'S PERFORMANCE BY THEIR ASSESSOR</p> <p>Q&A = OUTCOMES FROM ORAL OR WRITTEN QUESTIONING</p> <p>P = PRODUCTS OF THE LEARNER'S WORK</p> <p>RA = PERSONAL STATEMENTS AND/OR REFLECTIVE ACCOUNTS</p> <p>S = OUTCOME FROM SIMULATION, WHERE PERMITTED BY THE ASSESSMENT STRATEGY</p>	<p>PD = PROFESSIONAL DISCUSSION</p> <p>A = ASSIGNMENT, PROJECT/CASE STUDIES</p> <p>WT = AUTHENTIC STATEMENTS/WITNESS TESTIMONY</p> <p>EPW = EXPERT WITNESS TESTIMONY</p> <p>RPL = EVIDENCE OF RECOGNITION OF PRIOR LEARNING</p>
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Unit 6: Encourage innovation in your team

Unit code: C1

Unit credit: 11

Unit level: 6

Introduction

What this unit is about

This unit is about encouraging and supporting the identification and practical implementation of ideas. The initial ideas will primarily come from members of your team, including yourself, and will focus on:

- new products and/or services
- improvements to existing products and/or services
- improvements to existing practices, procedures, systems, ways of working, etc. within the team or those of the wider organisation or customers or suppliers.

Who is the unit for?

The unit is recommended for team leaders.

Links to other units

This unit is linked to units **B5: Provide leadership for your team** and **C2: Encourage innovation in your area of responsibility** in the overall suite of National Occupational Standards for Management and Leadership.

Skills

Listed below are the main generic 'skills' that need to be applied in encouraging innovation in your team. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Communicating
- Leadership
- Team-building
- Problem-solving
- Motivating
- Monitoring
- Decision-making
- Providing feedback
- Learning
- Valuing and supporting others
- Risk management
- Thinking creatively

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 The benefits of innovation to your team, the overall organisation and its customers. 2 The key differences between creativity and innovation. 3 How to make time available for identifying and developing ideas. 4 How to motivate people to generate and develop ideas. 5 How to provide constructive feedback on ideas to individuals. 6 The importance of communication in innovation and how to encourage communication across your team. 7 The potential obstacles to creativity and whether/how they can be removed. 8 The reasons for selecting initial ideas for further development. 9 How initial ideas might be further developed and tested. 10 How to recognise and manage risk in innovation. 11 How to develop formal proposals and plans for the practical implementation of an idea and how to support others in doing this. 12 How to develop creativity in yourself and others. 		

General knowledge and understanding			
13	The resources required for creativity and innovation, particularly time.		
14	How to identify sustainable resources and ensure their effective use to support creativity and innovation.		
15	How to learn from mistakes.		
16	How to recognise the achievements of the originators/developers of ideas that have been successfully implemented.		
Industry/sector specific knowledge and understanding			
1	Sector-specific legislation, regulations, guidelines and codes of practice relating to equality, diversity and inclusion.		
2	Equality, diversity and inclusion issues and developments that are particular to the industry or sector.		
3	Information sources on equality, diversity and inclusion in the industry or sector including those at an international level.		

Context specific knowledge and understanding	
<ol style="list-style-type: none"> 1 The overall vision, values, objectives, plans and culture of the organisation. 2 The planning and decision-making processes within the organisation. 3 Your organisation's current and potential customers and their needs. 4 The diversity of your organisation's workforce. 5 Appropriate comparators for reviewing the diversity of your organisation's workforce. 6 Other relevant parties with an interest in equality, diversity and inclusion in your organisation. 7 The organisation's written equality, diversity and inclusion policy and action plan and how they are communicated to people who work for the organisation and to other relevant parties. 8 Mechanisms for consulting with people who work for the organisation or their representatives on equality, diversity and inclusion issues. 9 Employment policies and practices within the organisation - including recruitment, selection, induction, development, promotion, retention, redundancy, dismissal, pay and other terms and conditions. 10 Organisations to benchmark against in terms of their approach to promoting diversity and inclusion. 11 Sources of specialist expertise in relation to equality, diversity and inclusion used by your organisation. 12 Systems in place for effective monitoring, reviewing and reporting on progress in relation to equality of opportunity, diversity and inclusion. 	

Additional evidence (if applicable):

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Unit 6 (C1): Encourage innovation in your team

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Motivate members of your team, including yourself, to identify ideas for new products and/or services and improvements.						
2 Respond enthusiastically to ideas identified by members of your team and provide constructive feedback.						
3 Encourage members of your team to share, discuss and work together in developing initial ideas.						
4 Identify and pursue opportunities to work with other teams to generate and develop ideas.						
5 Discuss and agree with members of your team those ideas which should be developed further, how they should be developed and the required resources.						
6 Provide ongoing support, encouragement and resources to members of your team who are developing and testing ideas and help to remove any identified obstacles.						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
7 Agree the practical implementation of ideas, based on the identified benefits, risks and required resources, when you have the authority to do so.						
8 Support members of your team in submitting formal proposals and plans for the practical implementation of ideas to other people for approval.						
9 Oversee practical implementation of ideas by your team and monitor and report on progress.						
10 Encourage and develop the creativity of members of your team.						
11 Encourage members of your team to take acceptable risks in pursuing innovation and to make and learn from mistakes.						
12 Ensure that the originators and developers of any ideas which are successfully implemented receive recognition for their achievement.						

Additional evidence (if applicable):

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Unit 6 (C1): Encourage innovation in your team

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
1 You find practical ways to overcome barriers.						
2 You encourage and support others to make the best use of their abilities.						
3 You make time available to support others.						
4 You display a curiosity to learn and try out new things.						
5 You balance risks against the benefits that may arise from taking risks.						
6 You act within the limits of your authority.						
7 You constructively challenge the status quo and seek better alternatives.						
8 You recognise the achievements and the success of others.						

Additional evidence (if applicable):

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Unit 7: Help team members address problems affecting their performance

Unit code:	D8
Unit credit:	5
Unit level:	6

Introduction

What this unit is about

This unit is about helping members of your team address problems affecting their performance. These may be work-related problems or problems arising from their personal circumstances.

The unit involves identifying problems affecting people's performance and discussing these in a timely way with the team members concerned to help them find a suitable solution to their problem. Sometimes you may need to refer the team member to specialist support services.

Who is the unit for?

The unit is recommended particularly for first line managers and middle managers.

Links to other units

This unit is linked to units **B8: Ensure compliance with legal, regulatory, ethical and social requirements**, **D5: Allocate and check work in your team**, **D6: Allocate and monitor the progress and quality of work in your area of responsibility**, **D9: Build and manage teams**, **D10: Reduce and manage conflict in your team** and **D13: Support individuals to develop and maintain their performance** in the overall suite of National Occupational Standards for Management and Leadership.

Skills

Listed below are the main generic 'skills' that need to be applied in helping team members address problems affecting their performance. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information

- Acting assertively
- Communicating
- Consulting
- Decision-making
- Empathising
- Information management
- Managing conflict
- Monitoring
- Problem-solving
- Providing feedback
- Reviewing
- Setting objectives
- Team-building
- Valuing and supporting others

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 The importance in giving team members opportunities to approach you with problems affecting their performance. 2 How to encourage team members to approach you with problems affecting their performance. 3 The importance of identifying performance issues and bringing these promptly to the attention of the team members concerned. 4 The importance of discussing problems with team members at a time and place appropriate to the type, seriousness and complexity of the problem. 5 How to gather and check the information you need to identify the problem and its cause. 6 The importance of identifying the problem accurately. 7 The range of alternative courses of action to deal with the problem. 8 The importance of discussing and agreeing with the team member a timely and effective way of dealing with the problem. 9 When to refer the team member to support services or specialists. 10 The importance of keeping a confidential record of your discussions with team members about problems affecting their performance, and how to do so. 11 The importance of ensuring your actions are in line with your organisation's policies for managing people and their performance. 		

Industry/sector specific knowledge and understanding		
1	Industry/sector requirements for helping team members address problems affecting their performance.	
Context specific knowledge and understanding		
1	The types of problems that your team members may encounter which can affect their performance.	
2	Your role, responsibilities and limits of authority when dealing with team members' problems.	
3	The range of support services or specialists that exist inside and outside your organisation.	
4	Your organisation's policies for managing people and their performance.	

Additional evidence (if applicable):

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Unit 7 (D8): Help team members address problems affecting their performance

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Give team members opportunities to approach you with problems affecting their performance.						
2 Identify performance issues and bring these promptly to the attention of the team members concerned.						
3 Discuss problems with team members at a time and place appropriate to the type, seriousness and complexity of the problem.						
4 Gather and check information to accurately identify the problem and its cause						
5 Discuss the range of alternative courses of action and agree with the team member a timely and effective way of dealing with the problem.						
6 Refer the team member to support services or specialists, where necessary.						
7 Keep a confidential record of your discussions with team members about problems affecting their performance.						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
8 Ensure your actions are in line with your organisation's policies for managing people.						

Additional evidence (if applicable):

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Unit 7 (D8): Help team members address problems affecting their performance

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
1 You find practical ways to overcome barriers.						
2 You show empathy with others' needs, feelings and motivations and take an active interest in their concerns.						
3 You make time available to support others.						
4 You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes						
5 You show integrity, fairness and consistency in decision-making.						
6 You confront performance issues and resolve them directly with the people involved.						
7 You keep confidential information secure.						
8 You check the validity and reliability of information.						

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
9 You identify the implications or consequences of a situation.						
10 You take timely decisions that are realistic for the situation						

Additional evidence (if applicable):

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Unit 8: Participate in meetings

Unit code: D12

Unit credit: 2

Unit level: 5

Introduction

What this unit is about

This unit is about participating in meetings in an active and constructive way.

It involves preparation before the meeting, perhaps researching information, consulting with others and clarifying your own objectives and opinions on the various agenda items. It also involves taking a positive stance within the meeting, presenting information and opinions clearly and concisely and acknowledging and building on the contributions of others, in order to arrive at the meeting's objectives. After the meeting, it may be necessary to communicate decisions to other people, in line with any protocol agreed at the meeting.

Who is the unit for?

The unit is recommended for managers at all levels.

Links to other units

This unit is linked to units **D11: Lead meetings**, **D17: Build and sustain collaborative relationships with other organisations**, **E10: Take effective decisions** and **E11: Communicate information and knowledge** in the overall suite of National Occupational Standards for Management and Leadership.

Skills

Listed below are the main generic 'skills' that need to be applied in participating in meetings. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Communicating
- Consulting
- Decision-making
- Involving others
- Obtaining feedback
- Planning
- Presenting information
- Providing feedback
- Researching
- Setting objectives
- Time management

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 The importance of briefing yourself on the content of the meeting. 2 How to identify relevant information for the meeting and clarify your opinions on various agenda items. 3 The importance of consulting those who have an interest in the various agenda items, and how to do so in order to understand and be able to represent their opinions. 4 The importance of setting your objectives for the meeting, and how to do so. 5 The importance of presenting relevant information and opinions to the meeting clearly and concisely, and how to do so. 6 How to present your opinions and the interests of those you are representing in a convincing way. 7 The importance of identifying and articulating any issues and problems emerging from discussions, and how to contribute to resolving them. 8 The importance of acknowledging information and opinions provided by other people and how to discuss these constructively. 9 The importance of clarifying decisions taken on various agenda items, where necessary, and how to do so. 10 The importance of communicating decisions clearly and in a timely way to those who have an interest in the various agenda items, and how to do so in line with any communication protocol agreed at the meeting. 		

	Industry/sector specific knowledge and understanding	
1	Industry/sector requirements for participating in meetings	
	Context specific knowledge and understanding	
1	The types and sources of information relevant for the meeting.	
2	People who have an interest in the various agenda items.	

Additional evidence (if applicable):

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Unit 8 (D12): Participate in meetings

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Brief yourself on the content of the meeting, identify relevant information and clarify your opinions on various agenda items.						
2 Consult with those who have an interest in the various agenda items in order to understand and be able to represent their opinions.						
3 Clarify your objectives from the meeting - what you hope the meeting will achieve.						
4 Present relevant information to the meeting clearly and concisely.						
5 Present your opinions and the interests of those you are representing in a convincing way, providing evidence to support your case, if required.						
6 Articulate any issues and problems emerging from discussions and propose and evaluate possible solutions.						

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
7 Acknowledge and constructively discuss information and opinions provided by other people.						
8 Clarify decisions taken on the various agenda items, where necessary.						
9 Communicate decisions clearly and concisely and in a timely way to those who have an interest in the various agenda items, in line with any communication protocol agreed at the meeting.						

Additional evidence (if applicable):

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Unit 8 (D12): Participate in meetings

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
1 You address multiple demands without losing focus or energy.						
2 You show respect for the views and actions of others.						
3 You present information clearly, concisely, accurately and in ways that promote understanding.						
4 You keep people informed of plans and developments.						
5 You state your own position and views clearly and confidently in conflict situations.						
6 You make best use of existing sources of information.						
7 You check the validity and reliability of information.						

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
8 You state own opinions, views and requirements clearly.						
9 You present ideas and arguments convincingly and in ways that strike a chord with people.						
10 You listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding.						

Additional evidence (if applicable):

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Unit 9: Initiate and follow disciplinary procedure

Unit code: D14

Unit credit: 6

Unit level: 6

Introduction

What this unit is about

This unit is about initiating and following your organisation's disciplinary procedure in response to misconduct or unsatisfactory performance of a member of your team.

All employing organisations are required to have disciplinary and grievance procedures. As a minimum, these must meet the requirements laid down in relevant employment legislation. However, many organisations have developed more detailed and extensive disciplinary procedures and associated rules to reflect their specific contexts and requirements.

This unit describes the minimum standard of performance expected of managers when they are implementing disciplinary procedures in line with legal and organisational requirements. To meet this standard, managers need both sound technical knowledge of the procedures and well-developed cognitive and interpersonal skills.

Who is the unit for?

The unit is for line managers who have to deal with misconduct or unsatisfactory performance of members of their team. It is **not** designed for human resources specialists who are required to develop disciplinary procedures and provide specialist support to line managers who are implementing them.

Links to other units

This unit is linked to unit **D15: Initiate and follow grievance procedure** in the overall suite of National Occupational Standards for Management and Leadership.

Skills

Listed below are the main generic 'skills' that need to be applied in implementing disciplinary procedure. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Acting assertively
- Analysing
- Communicating
- Decision-making
- Empathising
- Interviewing
- Monitoring
- Presenting information
- Questioning
- Reporting
- Researching

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each Standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 The importance of fully informing individuals about the standards of conduct and performance expected of them and your organisation’s current procedure for dealing with misconduct or unsatisfactory performance. 2 How to carry out investigations to establish facts relating to any misconduct or unsatisfactory performance. 3 Informal approaches to dealing with cases of minor misconduct or unsatisfactory performance, and when this type of approach is likely to resolve the situation effectively. 4 The differences between misconduct, gross misconduct and unsatisfactory performance, and how each should be handled. 5 The importance of following your organisation’s formal disciplinary procedure in serious cases of misconduct or unsatisfactory performance. 6 The importance of communicating clearly, concisely and objectively, and how to do so. 7 How to keep full and accurate records throughout the disciplinary process and store these confidentially as long as, but no longer than, necessary. 		

Industry/sector specific knowledge and understanding	
1	Industry/sector requirements for supporting individuals to improve their performance.
Context specific knowledge and understanding	
1	Your organisation's procedures for dealing with misconduct or unsatisfactory performance.
2	The standards of conduct and performance expected of individuals.
3	Sources of advice, guidance and support from colleagues, human resources or legal specialists.
4	The limits of your own knowledge, skills and competence.
5	Your organisation's policies and procedures for keeping full and accurate records.

Additional evidence (if applicable):

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Unit 9 (D14): Initiate and follow disciplinary procedure

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Keep individuals fully informed about the standards of conduct and performance expected of them and your organisation's current procedure for dealing with misconduct or unsatisfactory performance.						
2 Seek support from colleagues or human resources or legal specialists on any aspects of implementing disciplinary procedures about which you are unsure.						
3 Carry out necessary investigations promptly to establish the facts relating to any misconduct or unsatisfactory performance.						
4 Take preventative measures to resolve issues and deal with cases of minor misconduct or unsatisfactory performance informally, where you consider that an informal approach is likely to resolve the situation effectively.						
5 Follow your organisation's formal disciplinary procedure in serious cases of misconduct or unsatisfactory performance.						
6 Keep full and accurate records throughout the disciplinary process and store these confidentially as long as, but no longer than, necessary.						

Additional evidence (if applicable):

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Unit 9 (D14): Initiate and follow disciplinary procedure

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
1 You listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding.						
2 You present information clearly, concisely, accurately and in ways that promote understanding.						
3 You keep people informed of plans and developments.						
4 You give feedback to others to help them improve their performance.						
5 You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes.						
6 You act within the limits of your authority.						
7 You consult with internal and/or external experts when necessary.						

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
8 You say no to unreasonable requests.						
9 You confront performance issues and resolve them directly with the people involved.						
10 You keep confidential information secure.						
11 You work to develop an atmosphere of professionalism and mutual support.						
12 You take and implement difficult and/or unpopular decisions, if necessary.						

Additional evidence (if applicable):

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Unit 10: Initiate and follow grievance procedure

Unit code: D15

Unit credit: 6

Unit level: 6

Introduction

What this unit is about

This unit is about initiating and following your organisation's grievance procedure in response to a concern, problem or complaint raised by a member of your team.

All employing organisations are required to have disciplinary and grievance procedures. As a minimum, these must meet the requirements laid down in relevant employment legislation. However, many organisations have developed more detailed and extensive grievance procedures to reflect their specific contexts and requirements.

This unit describes the minimum standard of performance expected of managers when they are implementing grievance procedures in line with legal and organisational requirements. To meet this standard, managers need both sound technical knowledge of the procedures and well-developed cognitive and interpersonal skills.

Who is the unit for?

The unit is for line managers who have to deal with potential or actual grievances raised by members of their team. It is **not** designed for human resources specialists who are required to develop grievance procedures and provide specialist support to line managers who are implementing them.

Links to other units

This unit is linked to unit **D14: Initiate and follow disciplinary procedure** in the overall suite of National Occupational Standards for Management and Leadership.

Skills

Listed below are the main generic 'skills' that need to be applied in implementing grievance procedure. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

- Acting assertively
- Assessing
- Communicating
- Decision-making
- Empathising
- Managing conflict
- Presenting information
- Questioning
- Reporting
- Researching

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each Standard.

Knowledge and understanding	Type of evidence	Date
General knowledge and understanding		
1 The importance of fully informing individuals about your organisation's current procedure for raising grievances.		
2 Informal approaches to dealing with concerns, problems or complaints raised with you, and when this type of approach is likely to resolve the situation effectively.		
3 The importance of following your organisation's formal grievance procedure, and when to do so.		
4 How to conduct a meeting with an individual to discuss their grievance.		
5 How to investigate the grievance fully.		
6 The importance of communicating clearly, concisely and objectively, and how to do so.		
7 How to keep full and accurate records throughout the grievance process and store these confidentially as long as, but no longer than, necessary.		
Industry/sector specific knowledge and understanding		
1 Industry/sector requirements for implementing grievance procedures		
Context specific knowledge and understanding		
1 Your organisation's procedure for dealing with grievances.		
2 Sources of advice, guidance and support from colleagues, human resources or legal specialists.		
3 Your organisation's policies and procedures for keeping full and accurate records.		

Additional evidence (if applicable):

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Unit 10 (D15): Initiate and follow grievance procedure

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Performance criteria	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Keep individuals fully informed about your organisation's current procedure for raising grievances.						
2 Seek support from colleagues or human resources or legal specialists on any aspects of implementing grievance procedures about which you are unsure.						
3 Identify potential grievances and take preventative measures to resolve issues where possible.						
4 If an individual raises a concern, problem or complaint with you, seek to resolve the situation informally, if you consider that an informal approach is likely to resolve the situation effectively.						
5 Follow your organisation's formal grievance procedure, if an individual raises a grievance with you in writing.						
6 Keep full and accurate records throughout the grievance process and store these confidentially as long as, but no longer than, necessary.						

Additional evidence (if applicable):

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Unit 10 (D15): Initiate and follow grievance procedure

What you must do

To achieve this unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
1 You listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding.						
2 You present information clearly, concisely, accurately and in ways that promote understanding.						
3 You keep people informed of plans and developments.						
4 You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes.						
5 You act within the limits of your authority.						
6 You consult with internal and/or external experts when necessary.						
7 You show integrity, fairness and consistency in decision-making.						

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard:						
8 You keep confidential information secure.						
9 You push for concrete information in an ambiguous situation.						
10 You identify the implications or consequences of a situation.						

Additional evidence (if applicable):

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Unit 11: Resolve customer service problems

Unit code: F5

Unit credit: 6

Unit level: 5

Introduction

What this unit is about

This unit is all about what to do when it is difficult to meet customer expectations.

Even if the service you give is excellent, some customers will experience problems. Part of your job is to help to resolve those problems. A problem is anything that means customer expectations are not being met. This may be because your customer's expectations involve more than you can offer or because your service procedures have not been followed.

Some problems are reported by customers and sometimes you spot the problem first and resolve it before your customer has even noticed.

As soon as you are aware of a problem, you need to consider the options and then choose a way to put it right.

This unit is particularly important in customer service because many customers judge how good the customer service of your organisation is by the way problems are handled.

Key words and phrases for this unit

- listening
- recognise repeated problems
- share feedback
- choose amongst options
- work with others
- resolve problems
- check progress
- give explanations

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
General knowledge and understanding 1 Organisational procedures and systems for dealing with customer service problems. 2 How to defuse potentially stressful situations. 3 How to negotiate. 4 The limitations of what you can offer your customer.		

Additional evidence (if applicable):

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Element 1: Spot customer service problems

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Listen carefully to your customers about problems they have raised.						
2 Ask your customers about the problem to check your understanding.						
3 Recognise repeated problems and alert the appropriate authority.						
4 Share customer feedback with others to identify potential problems before they happen.						
5 Identify problems with systems and procedures before they begin to affect your customers.						

Additional evidence (if applicable):

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Element 2: Pick the best solution to resolve customer service problems

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Identify the options for resolving a customer service problem.						
2 Work with others to identify and confirm the options to resolve a customer service problem.						
3 Work out the advantages and disadvantages of each option for your customer and your organisation.						
4 Pick the best option for your customer and your organisation.						
5 Identify for your customer other ways that problems may be resolved if you are unable to help.						

Additional evidence (if applicable):

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Element 3: Take action to resolve customer service problems

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Discuss and agree the options for solving the problem with your customer.						
2 Take action to implement the option agreed with your customer.						
3 Work with others and your customer to make sure that any promises related to solving the problem are kept.						
4 Keep your customer fully informed about what is happening to resolve problem.						
5 Check with your customer to make sure the problem has been resolved to their satisfaction.						
6 Give clear reasons to your customer when the problem has not been resolved to their satisfaction.						

Additional evidence (if applicable):

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Unit 12: Monitor and solve customer service problems

Unit code:	F6
Unit credit:	6
Unit level:	6

Introduction

What this unit is about

Your job involves delivering and organising excellent customer service. However good the service provided, some of your customers will experience problems and you will spot and solve other problems before your customers even know about them.

This unit is all about the part of your job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems.

Remember that some customers judge the quality of your customer service by the way that you solve customer service problems. You can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Key words and phrases for this unit

- solve problems
- work with others
- keep customers informed
- repeated problems
- choose amongst options
- avoid problems
- inform
- monitor changes
- adjust changes

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 Organisational procedures and systems for dealing with customer service problems. 2 Organisational procedures and systems for identifying repeated customer service problems. 3 How the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers 4 The external customer and improved working relationships with service partners or internal customers. 5 How to negotiate with and reassure customers while their problems are being solved. 		

Additional evidence (if applicable):

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Element 1: Solve immediate customer service problems

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Respond positively to customer service problems following organisational guidelines.						
2 Solve customer service problems when you have sufficient authority.						
3 Work with others to solve customer service problems.						
4 Keep customers informed of the actions being taken.						
5 Check with customers that they are comfortable with the actions being taken.						
6 Solve problems with service systems and procedures that might affect customers before they become aware of them.						
7 Inform managers and colleagues of the steps taken to solve specific problems.						

Additional evidence (if applicable):

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Element 2: Identify repeated customer service problems and options for solving them

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Identify repeated customer service problems.						
2 Identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option.						
3 Work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of your organisation.						

Additional evidence (if applicable):

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Element 3: Take action to avoid the repetition of customer service problems

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated.						
2 Action your agreed solution.						
3 Keep your customers informed in a positive and clear manner of steps being taken to solve any service problems.						
4 Monitor the changes you have made and adjust them if appropriate.						

Additional evidence (if applicable):

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Unit 13: Support customer service improvements

Unit code:	F7
Unit credit:	5
Unit level:	5

Introduction

What this unit is about

Organisations change the way they deliver service to their customers because customer expectations rise and because other organisations improve the services they offer. Often the most important ideas about how to improve customer service come from people dealing directly with customers.

Your job involves delivering customer service. If your organisation has decided to make changes, it is your job to support them and to present them positively to your customers. Also, by listening to customer comments you may have your own ideas about how the service you deliver could be improved.

This unit is all about how you provide support for changes that your organisation has introduced. In addition, it covers how you present your own ideas for improvements to someone in your organisation who can authorise trying out the change.

Key words and phrases for this unit

- communicate changes positively
- customer service improvements
- customer feedback
- collect information
- use feedback
- present possibilities for change
- improve service
- share ideas
- implement changes
- monitor change

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
General knowledge and understanding 1 How customer experience is influenced by the way service is delivered. 2 How customer feedback is obtained. 3 How to work with others to identify and support change in the way service is delivered. 4 Why it is important to give a positive impression to your customer about the changes made by your organisation even if you disagree with them.		

Additional evidence (if applicable):

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Element 1: Use feedback to identify potential customer service improvements

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Gather informal feedback from your customers. Use customer feedback procedures to collect information from your customers.						
2 Use the information from your customers to develop a better understanding of their customer service experience.						
3 Identify ways the service you give could be improved based on information you have gathered.						
4 Share your ideas for improving customer service with colleagues.						

Additional evidence (if applicable):

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Element 2: Implement changes in customer service

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Identify a possible change that could be made to improve customer service.						
2 Present your idea for improving customer service to a colleague with the appropriate authority to approve the change.						
3 Carry out changes to customer service procedures based on your own idea or proposed by your organisation.						
4 Keep your customers informed of changes to customer service.						
5 Give customers a positive impression of changes that have been made.						
6 Work positively with others to support customer service changes.						

Additional evidence (if applicable):

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Element 3: Assist with the evaluation of changes in customer service

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Discuss with others how changes to customer service are working.						
2 Work with others to identify any negative effects of changes and how these can be avoided						

Additional evidence (if applicable):

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Unit 14

Work with others to improve customer service

Unit code:	F8
Unit credit:	8
Unit level:	6

Introduction

What this unit is about

Teamwork is a key component of delivering and improving excellent customer service. The people you work with to improve customer service may include one or more of the following: team members; colleagues; suppliers; service partners; supervisors; managers; team leaders.

The delivery of excellent customer service depends on your skills and those of others. It involves communicating with each other and agreeing how you can work together to give a more effective service. You need to work together positively. You must also monitor your own and the team's performance and change the way you do things if that improves customer service.

This unit is all about how you develop a relationship with others to improve your customer service performance.

Key words and phrases for this unit

- work with others
- improve customer service
- contribute ideas
- co-operate with others
- keep commitments
- monitor own performance
- monitor joint performance

What you must know and understand

To achieve this unit you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge and understanding	Type of evidence	Date
<p>General knowledge and understanding</p> <ol style="list-style-type: none"> 1 Who else is involved either directly or indirectly in the delivery of customer service. 2 The roles and responsibilities of others in your organisation. 3 The roles of others outside your organisation who have an impact on your services or products. 4 What the goals or targets of your organisation are in relation to customer service and how these are set. 5 How your organisation identifies improvements in customer service. 		

Additional evidence (if applicable):

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Element 1: Improve customer service by working with others

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Contribute constructive ideas for improving customer service.						
2 Identify what you have to do to improve customer service and confirm this with others.						
3 Agree with others what they have to do to improve customer service.						
4 Co-operate with others to improve customer service. Keep your commitments made to others.						
5 Make others aware of anything that may affect plans to improve customer service.						

Additional evidence (if applicable):

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Element 2: Monitor your own performance when improving customer service

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Discuss with others how what you do affects customer service performance.						
2 Identify how the way you work with others contributes towards improving customer service.						

Additional evidence (if applicable):

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Element 3: Monitor joint performance when improving customer service

What you must do

To achieve this element of the unit you must give sufficient evidence to demonstrate your competence for each standard.

Behaviours	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1 Discuss with others how teamwork affects customer service performance.						
2 Identify with others how customer service teamwork could be improved.						

Additional evidence (if applicable):

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