

BTEC Short Courses

Edexcel Level 7
BTEC Advanced Professional Award,
Certificate and Diploma in
Management Studies

September 2005

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Guidance and units

Edexcel Level 7 BTEC Advanced Professional Award,
Certificate and Diploma in
Management Studies

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EDEXCEL LEVEL 7 BTEC ADVANCED PROFESSIONAL AWARD, CERTIFICATE AND DIPLOMA IN MANAGEMENT STUDIES

BTEC Advanced Professional Award in Management Studies

BTEC Advanced Professional Certificate in Management Studies

BTEC Advanced Professional Diploma in Management Studies

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Qualification titles covered by this specification

Edexcel Level 7 BTEC Advanced Professional Award in Management Studies

Edexcel Level 7 BTEC Advanced Professional Certificate in Management Studies

Edexcel Level 7 BTEC Advanced Professional Diploma in Management Studies

These qualifications have been accredited to the National Qualifications Framework (NQF). The NQF Qualification Accreditation Numbers (QAN) for these qualifications are listed in *Annexe A*.

These qualification titles are as they will appear on the learner's certificate. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel. Providing this happens, centres are able to describe the programme of study leading to the award of the qualification in different ways to suit the medium and the target audience.

The revised NQF Levels

The Qualifications and Curriculum Authority (QCA) have introduced changes to the National Qualifications Framework (NQF) in the way it sets out the levels at which qualifications are recognised. The revised levels for higher qualifications broadly compare with the Framework for Higher Education Qualifications (FHEQ).

The QCA changes will allow the NQF to recognise more precisely the true level of BTEC Professional and Advanced Professional Qualifications. From September 2004, these will be accredited at the revised NQF Levels of 4, 5, 6, 7 and 8.

This specification shows the revised NQF levels. The QCA Openquals database (www.qca.org.uk/openquals) will show both the original level and the revised level for each of these qualifications. Certification will be at the original levels up until 31 December 2005. All certifications from 01 January 2006 will be at the revised levels.

Suites of qualifications within a specific sector may not necessarily involve qualifications at every level. Access to BTEC Professional and Advanced Professional Qualifications may not be from the level immediately below a particular qualification. Similarly, progression to further related qualifications may not be to the level immediately above a particular qualification.

Further information on these changes can be obtained from the QCA at www.qca.org.uk/qualifications. *Annexe B* (page 147) shows the position of BTEC Professional and Advanced Professional Qualifications within the NQF.

Introduction

This document contains the units and associated guidance for the National Qualifications Framework (NQF) Edexcel Level 7 BTEC Advanced Level 7 Qualifications in Management Studies. Each unit sets out the required outcomes and content and includes advice regarding appropriate delivery and assessment strategies. The guidance contains further details of the teaching, learning, assessment and quality assurance of these qualifications. It includes advice about Edexcel's policy regarding access to its qualifications, the design of programmes of study and delivery modes.

Structure of the qualification

Edexcel Level 7 BTEC Advanced Professional Award in Management Studies

The Edexcel Level 7 BTEC Advanced Professional Award in Management Studies is a 90-hour qualification comprising **three** units of 30 hours each.

To achieve the whole qualification, a learner must successfully complete **one** core unit and **two** specialist units.

Unit number	Unit title	Guided learning hours	Unit level
Core units – all units are compulsory			
1	Advanced Professional Development	30	7
Specialist units – choose two units only			
2	Managing Change in Organisations	30	7
3	Management Research — Project and Presentation	30	7
4	Strategic Planning and Implementation	30	7
5	Managing Financial Principles and Techniques	30	7
6	Human Resources Planning and Development	30	7
7	Management in the Wider Environment	30	7
8	Leadership of Your Organisation	30	7
9	Culture Climate Values	30	7
10	Management Research Methods	30	7
11	Strategic Review	30	7
12	Supply Chain Management	30	7
13	The Creative Manager	30	7
14	Managing Finance for Strategic Managers	30	7
15	Managing Virtual Organisations	30	7
16	Managing Human Resources Policy	30	7
17	Strategic Marketing Management	30	7
18	Developing a Communication Strategy	30	7
19	Quality and Systems Management	30	7

Edexcel Level 7 BTEC Advanced Professional Certificate in Management Studies

The Edexcel Level 7 BTEC Advanced Professional Certificate in Management Studies is a 180-hour qualification comprising **six** units of 30 hours each.

To achieve the whole qualification, a learner must successfully complete **two** core units and **four** specialist units.

Unit number	Unit title	Guided learning hours	Unit level
Core units – all units are compulsory			
1	Advanced Professional Development	30	7
2	Managing Change in Organisations	30	7
Specialist units – choose four units only			
3	Management Research — Project and Presentation	30	7
4	Strategic Planning and Implementation	30	7
5	Managing Financial Principles and Techniques	30	7
6	Human Resources Planning and Development	30	7
7	Management in the Wider Environment	30	7
8	Leadership of Your Organisation	30	7
9	Culture Climate Values	30	7
10	Management Research Methods	30	7
11	Strategic Review	30	7
12	Supply Chain Management	30	7
13	The Creative Manager	30	7
14	Managing Finance for Strategic Managers	30	7
15	Managing Virtual Organisations	30	7
16	Managing Human Resources Policy	30	7
17	Strategic Marketing Management	30	7
18	Developing a Communication Strategy	30	7
19	Quality and Systems Management	30	7

Edexcel Level 7 BTEC Advanced Professional Diploma in Management Studies

The Edexcel Level 7 BTEC Advanced Professional Diploma in Management Studies is a 270-hour qualification comprising **nine** units of 30 hours each.

To achieve the whole qualification, a learner must successfully complete **three** core unit and **six** specialist units.

Unit number	Unit title	Guided learning hours	Unit level
Core units – all units are compulsory			
1	Advanced Professional Development	30	7
2	Managing Change in Organisations	30	7
3	Management Research — Project and Presentation	30	7
Specialist units – choose six units only			
4	Strategic Planning and Implementation	30	7
5	Managing Financial Principles and Techniques	30	7
6	Human Resources Planning and Development	30	7
7	Management in the Wider Environment	30	7
8	Leadership of Your Organisation	30	7
9	Culture Climate Values	30	7
10	Management Research Methods	30	7
11	Strategic Review	30	7
12	Supply Chain Management	30	7
13	The Creative Manager	30	7
14	Managing Finance for Strategic Managers	30	7
15	Managing Virtual Organisations	30	7
16	Managing Human Resources Policy	30	7
17	Strategic Marketing Management	30	7
18	Developing a Communication Strategy	30	7
19	Quality and Systems Management	30	7

Key features

BTEC Advanced Professional Qualifications are designed to provide focused and specialist vocational short courses, linked to professional body requirements and National Occupational Standards where appropriate, with a clear work-related emphasis. The qualifications provide short vocational programmes of study that meet the individual needs of learners. There is a strong emphasis on practical skills development alongside the development of requisite knowledge and understanding in the sector.

BTEC Advanced Professional Qualifications are particularly suitable for more mature learners who wish to follow a short programme of study that is directly related to their work experience or to an aspect of employment that they wish to move into in due course. On successful completion of these qualifications, national recognition by employers enables learners to progress into or within employment and/or continue their study in the vocational area.

Learners are able to progress across the range of BTEC Advanced Professional Qualifications in Management Studies, that is from Award to Certificate to Diploma. BTEC Advanced Professional Qualifications also support Continuing Professional Development, as well as sideways progress to Masters degrees in Management or Level 5 NVQs in Management.

BTEC Advanced Professional Qualifications are designed to meet a range of different needs. The range of qualifications offers:

- maximum flexibility with shorter programmes available across Levels 7 and 8 of the NQF
- the opportunity to certificate smaller blocks of learning, which are designed to motivate learners and encourage widening participation in education and training
- courses that relate to the particular training and employment patterns in a sector
- courses that may offer preparation for specific jobs when in employment
- the opportunity to use a range of delivery methods
- opportunities for learners to develop skills that support career and professional development
- underpinning knowledge, skills and understanding linked, where appropriate, to named NVQs
- programmes that can enable progression either to higher levels of study or to other courses at the same level of study.

Edexcel Level 7 BTEC Advanced Professional Qualifications in Management Studies

The Edexcel Level 7 BTEC Advanced Professional Award in Management Studies

The three-unit Level 7 BTEC Advanced Professional Award serves the needs of a wide range of learners either already employed in, or seeking employment in, management positions. The Award may also be attractive to learners who are unable to commit to the study time required by the BTEC Advanced Professional Certificate or Diploma. It is equally suited to mature learners who wish to follow a short programme of study relating to an area of employment they are in or wish to move into.

The one-unit core of the Award focuses on personal and professional development and the skills for managing self, which underpin all areas of management. The wide choice available from the specialist units for the other two units which make up the Award, enables the learner to select a specific area of management which is of interest to them, or which is specific to their current or future work responsibilities.

The Edexcel Level 7 BTEC Advanced Professional Certificate in Management Studies

The six-unit Level 7 BTEC Advanced Professional Certificate in Management Studies provides a specialist work-related programme of study that covers the knowledge and skills required in the management sector. The two core units provide essential underpinning knowledge and management skills for the specialist units. The wide choice of specialist units allows learners to choose units linked to the specialist management area of their current or desired employment or to spread their choice across the six functional areas identified in the Management Standards. This provides a broad based, but specialist, qualification.

The Level 7 BTEC Advanced Professional Certificate in Management Studies offers a specialist work-related qualification for learners wanting to confirm or extend their work experience if they are or have been employed in the management sector. It also provides a suitable qualification for those wishing to change career or move into a management position.

The Edexcel Level 7 BTEC Advanced Professional Diploma in Management Studies

The nine-unit Diploma extends and deepens the specialist focus available in the six-unit Certificate. This qualification has three core units supported by six specialist units chosen from a wide range of available specialist units. This qualification broadens and deepens the learners' management skills and knowledge.

These qualifications offer an engaging programme for higher education and adult learners who are clear about the area of employment they wish to enter or to which they wish to progress within existing employment. It also provides a suitable qualification for those wishing to change career or move into employment in management following a career break. Access to suitable management work situations is fundamental to successful completion of this qualification, either through permanent full- or part-time employment or through a collaborative work placement.

Professional body recognition

Level 7 BTEC Advanced Professional Qualifications in Management Studies have been developed with career progression and recognition by professional bodies in mind. It is essential that learners gain the maximum benefit from their programme of study.

Further details of professional body recognition and exemptions of BTEC Advanced Professional Qualifications are contained in the *BTEC Professional Recognition* publication which is available on Edexcel's website (www.edexcel.org.uk).

National Occupational Standards

BTEC Advanced Professional Qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context. However, the qualifications can provide areas of underpinning knowledge for the National Occupational Standards, as well as develop practical skills in preparation for work and possible achievement of National Vocational Qualifications (NVQs) in due course. Where appropriate, BTEC Advanced Professional Qualifications are designed to relate to the National Occupational Standards in the sector which in turn form the basis of the NVQs.

Some units also relate to the National Occupational Standards in Management. Links to Management National Occupational Standards are indicated in each unit.

Higher-level skills

Learners studying for the BTEC Advanced Professional Awards in Management Studies will be expected to develop the following skills during the programme of study:

- systematic understanding of knowledge and a critical awareness of current problems and new insights, much of which is at the forefront of the professional area of management
- comprehensive understanding of management techniques and ability to apply
- originality in the application of knowledge, together with a practical understanding of how established techniques of research and enquiry are used to create and interpret knowledge in the area of management
- critical evaluation of current research and advanced scholarship in the area of management
- the ability to develop and apply novel approaches in handling complex and unpredictable situations
- the ability to operate effectively in highly critical situations by dealing effectively with problems and employing a high level of skill, judgement and insight
- the ability to respond to change and initiate change
- the ability to deal with complex issues creatively yet systematically, make sound judgements and communicate their conclusions clearly to specialist and non-specialist audiences
- the demonstration of self-direction and originality in tackling and solving problems
- the ability to act autonomously in planning and implementing tasks.

Unit format

The units in BTEC Advanced Professional qualifications all have a standard format which is designed to provide clear guidance on the requirements of the qualification for learners, assessors and those responsible for monitoring national standards.

Each unit is set out in the following way.

The unit title is accredited by QCA and this form of words will appear on the learner's Notification of Performance. The level refers to the level in the NQF. In the Edexcel Level 7 BTEC Advanced Professional Award, Certificate and Diploma in Management Studies, each unit consists of 30 guided learning hours.

Description of unit

A brief description of the overall purpose of the unit is given, together with the key areas of study associated with the unit.

Learning outcomes

The outcomes of the unit identify what each learner must do in order to pass the unit. Learners must achieve all the outcomes in order to pass the unit.

Content

This section reflects the highlighted words from the learning outcomes and amplifies the content coverage required when addressing the outcomes. The content section will often have lists of topics. Care should be taken to note those that all aspects of the listed topics should be covered, except those that begin with 'eg', where the list is merely indicative.

Outcomes and assessment criteria

Each unit contains statements which will evaluate the evidence that each learner should produce in order to receive a pass.

Guidance

This section is not prescriptive but provides additional guidance and amplification related to the unit to support teachers/deliverers and assessors. Its subsections are as follows:

- *Delivery* — offers guidance about possible approaches to delivery. This advice is based on the more usual delivery modes and is not intended to rule out alternative approaches.
- *Assessment* — provides advice about the nature and type of evidence that learners are likely to need to produce. This section should be read in conjunction with the assessment criteria.
- *Links* — sets out any links with other units within the qualification that could be used to ensure that learners can relate different aspects within the qualification and offer opportunities for integration of learning, delivery and assessment. Links to the NOS, the wider curriculum, environmental issues and European developments will be highlighted here.
- *Resources* — identifies the specialist resources likely to be needed to allow learners to generate the evidence required by each unit. The centre will be asked to ensure that this requirement is in place when it seeks approval from Edexcel to offer the qualification.
- *Support materials* — identifies support materials, for example textbooks, videos, magazines, journals and websites that may support the delivery of the unit.

Teaching, learning and assessment

The process of assessment should be part of effective planning of teaching and learning by providing opportunities for both the learner and the assessor to obtain information about progress towards learning goals. The assessor and the learner must be actively engaged in promoting a common understanding of the assessment criteria (ie what it is they are trying to achieve) for further learning to take place. Therefore, learners need constructive feedback and guidance about how to improve, capitalising on strengths with clear and constructive comments about weaknesses and how these might be addressed.

The purpose of assessment is to ensure that effective learning of the content of each unit has taken place.

Assessment is normally undertaken by creating assignment briefs using the criteria — but contextualised to be relevant for learners. Assignment briefs are devised by centres and should ensure coverage of all criteria in the unit, as set out in the unit *Assessment criteria* grid. Criteria should be clearly indicated on each assignment to provide a focus for learners (for transparency and to help ensure that feedback is specific to the criteria) and to assist with internal standardisation processes. Tasks/activities should enable learners to produce evidence that directly relates to the specified criteria.

Assignments should be valid, reliable and fit for purpose, building on the application of the assessment criteria. Centres should use a variety of assessment methods, including case studies, assignments and work-based assessments, along with projects, performance observation and time-constrained assessments. Centres are encouraged to emphasise the practical application of the assessment criteria by providing a realistic scenario for learners to adopt and making maximum use of practical activities and work experience. The creation of fit-for-purpose assignments is vital for learners' achievement.

Completing Advanced Professional qualification units

The assessment of BTEC Advanced Professional qualifications is at unit level. No unit grades are awarded and there is no overall grade for the Award, Certificate or Diploma. Learners are able to access the qualification in a unitised approach if this is appropriate. Assessment will be made against the learning outcomes and assessment criteria, published within each unit, which centres are expected to make available to learners.

For transparency of assessment, centres are expected to ensure that all assessment briefs clearly set out the tasks required, the learning outcomes to be met and the assessment criteria that will be applied. Centres will need to ensure that there is a clear audit trail for both internal verification and to satisfy the needs of the Edexcel external examiner.

Each unit will be awarded for the achievement of all outcomes against the specified assessment criteria. In order to demonstrate achievement, learners typically undertake assessment activities that include a series of tasks or assignments, reflecting typical practice in the sector concerned.

Completing a BTEC Level 7 Advanced Professional Qualification

Learners must pass one core unit and two specialist units to achieve the Level 7 BTEC Advanced Professional Award in Management Studies.

Learners must pass two core units and four specialist units to achieve the Level 7 BTEC Advanced Professional Certificate in Management Studies.

Learners must pass three core units and six specialist units to achieve the Level 7 BTEC Advanced Professional Diploma in Management Studies.

Completion of each unit will be the main factor in determining whether a learner has passed the full qualification. If the full qualification is achieved, certification for BTEC Level 7 Advanced Professional courses will show the profile of units completed.

Accreditation of Prior Learning (APL)

Edexcel encourages centres to recognise learners' previous achievements and experience through the APL. Learners may have evidence generated from previous study, from their previous or current employment or whilst undertaking voluntary work relating to one or more of the units in the qualification. Assessors should assess this evidence against the BTEC Advanced Professional qualification standards in the specifications in the normal way. As with all evidence, assessors should be satisfied about the authenticity and currency of the material when considering whether or not the outcomes of the unit have been met.

Full guidance about Edexcel's assessment policy on APL is provided on our website (www.edexcel.org.uk).

Quality assurance

The quality assurance system for BTEC Advanced Professional qualifications, as higher-level vocational qualifications at Level 4 to 8 on the NQF, will comprise three main components:

- **approval process** — a control measure to confirm that individual centres (and programme teams) are appropriately resourced and competent to deliver a BTEC Level 4 to 8 programme of study
- **monitoring of centres** — a method of monitoring centres' internal quality systems to ensure ongoing fulfilment of initial requirements and, where appropriate, enhancement of those requirements to accommodate new qualifications
- **independent assessment** — a measure that provides independence within the assessment process, so that the certificated outcomes for each learner are not reliant on determinations by individuals or groups with a vested interest in the outcome. This measure should be consistent and reliable over time, and should not create unnecessary barriers.

Centre and programme approval

Approval to offer BTEC Advanced Professional Qualifications will vary depending on the status of the centre. Centres that have a recent history of delivering BTEC Advanced Professional Qualifications and have an acceptable quality profile in relation to their delivery will be able to gain approval through an accelerated process. Centres that are new to the delivery of BTEC Advanced Professional Qualifications will be required to submit evidence to demonstrate that they:

- have the human and physical resources required for effective delivery and assessment
- understand the implications for independent assessment and agree to abide by them
- have a robust internal assessment system supported by 'fit-for-purpose' assessment documentation
- have a system to internally verify assessment decisions to ensure standardised assessment decisions are made across all assessors and sites.

Such applications have to be supported by the head of the centre (principal, chief executive, etc).

We communicate all approvals in writing to the head of centre in the form of a qualification approval letter. The approval letter will also contain a programme definition for each qualification approved. The programme definition clearly states to the centre all units that comprise the qualification for which the centre is approved.

Monitoring centres' internal quality systems

Centres will be expected to demonstrate ongoing fulfilment of approval criteria across all programme areas. This should include the consistent application of policies affecting learner registrations and appeals, together with the effectiveness of internal examination and standardisation processes.

Centres may opt for a review of their provision under the quality verifier/quality reviewer arrangements, which already apply to all further education centres. Alternatively, centres may present evidence of their operation within a recognised code of practice, such as that of the Quality Assurance Agency for Higher Education. Edexcel reserves the right to confirm independently that these arrangements are operating to our satisfaction.

Independent assessment: the role of the external examiner

Supporting consistency and appropriateness of centre assessor decisions

For all BTEC Advanced Professional Qualifications accredited at Level 7 on the NQF, Edexcel will appoint appropriately qualified subject-specific external examiners to the programme in each centre. Edexcel will define the selection, appointment and training process, together with the roles and responsibilities of the external examiners and will communicate the details to centres in a centre handbook.

The function of the external examiner will be to review and evaluate objectively the assessment process and standards of learner attainment by independently reviewing a sample of learner work (including the centre-designed assignments on which the samples are based) selected by the external examiner, from across the programme.

When they visit centres, external examiners must be afforded reasonable access to the assessed parts of the programme, including evidence of learner performance on placement. They are required to:

- confirm that standards are appropriate for the qualification and its elements
- assist institutions in the comparison of academic standards across similar awards nationally.

Should any disparity occur between the judgement of centre assessors and that of the external examiner, this will be reported to the centre and to Edexcel by the external examiner. The centre will be required to agree appropriate corrective action as a result of this report.

Independence in confirmation of certificated outcomes

The external examiner will visit the centre in order to assess learner work independently and to evaluate centre assessor decisions on final outcomes. This process of evaluation may focus upon work in units, selected by the external examiner, that present the most appropriate evidence for this exercise. The work of all learners not already sampled will be reviewed.

Resolution of assessments will normally be handled at the centre's final programme review board. The external examiner will be expected to endorse the outcomes of assessment before certification can be authorised. Should the external examiner be unable to provide such endorsement, certification will be withheld until appropriate corrective action has taken place. (The senior subject examiner may become involved in such instances.)

The external examiner will be required to prepare a written report after each visit. The report will include comments from the external examiner on:

- academic standards and programme specification
- academic standards and learner performance
- academic standards and assessment
- the assessment process
- assessment meetings
- physical resources
- learners' comments
- meetings with staff
- issues arising from previous reports
- details of sampling

- areas of good practice and major issues
- action points.

The external examiner report provides the mechanism by which the external examiner independently verifies learner ability, endorses the validity of the assessment process and releases certification for a cohort.

The report is a confidential document between Edexcel, the appointed external examiner, and the centre to use for internal/external quality assurance processes. It provides the centre with feedback on the external examining process and on the judgements that determine the external examiner's decisions on endorsement, or otherwise, of learner outcomes.

Programme design and delivery

The qualifications consist of core units (which are mandatory) and specialist units. These specialist units will be mostly optional and are designed to provide a specific focus to the qualification.

In the BTEC Advanced Professional Award in Management Studies, each unit consists of 30 guided learning hours. The definition of guided learning hours is 'a notional measure of the substance of a qualification'. It includes an estimate of time that might be allocated to direct teaching, instruction and assessment, together with other structured learning time such as directed assignments or supported individual study. It excludes learner-initiated private study. Centres are advised to consider this definition when planning the programme of study associated with this specification.

Mode of delivery

Edexcel does not define the mode of study for BTEC Advanced Professional Qualifications. Centres are free to offer the qualifications using any mode of delivery that meets the needs of their learners. This may be through traditional classroom teaching, open learning, distance learning or a combination of these. Whatever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specifications and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. Assessment instruments based on the learners' work environment should be encouraged. Those planning the programme should aim to enhance the vocational nature of the BTEC Advanced Professional Qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

BTEC Professional Qualifications are designed to prepare or support learners for employment in specific sectors. Physical resources, such as interactive whiteboards and other suitable IT equipment, are needed to support the delivery of the programme and the proper assessment of the outcomes where required. They should, therefore, normally be of industry standard. Staff delivering programmes and conducting the assessments should be fully familiar with current practice and standards in the teaching sector, particularly concerning up-to-date government policies and initiatives. Centres will need to meet any specialist resource requirements when they seek approval from Edexcel.

Specialist resources should include case study materials, real resources acquired from supportive schools, videos and documented examples of current practice. These are detailed in each unit.

Delivery approach

It is important that centres develop an approach to teaching and learning that supports the specialist vocational nature of BTEC Advanced Professional Qualifications in Management Studies. The specifications contain a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practice and that the knowledge base is applied to the sector. This will require the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of the learner's experience.

Centres should note that the qualifications set out in these specifications have been developed in consultation with centres, employers and the Management Standards Centre, the standards-setting body for the management sector. The units are designed to meet the skill needs of the sector and the specialist units allow coverage of the full range of employment. Centres should make maximum use of the choice available to them within the specialist units to meet the needs of their learners, as well as the local skills and training needs identified by organisations such as the Regional Development Agency and the Local Learning and Skills Council.

Access and recruitment

Edexcel's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all those wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualification and that it will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should also show regard for Edexcel's policy on learners with particular requirements.

Centres will need to review the profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a Level 7 qualification. For learners who have recently been in education, the entry profile is likely to include at least one of the following:

- a degree, or BTEC Higher National Certificate or Diploma in a related subject (eg Business, Management)
- a BTEC Level 5/6 Short Course in a related subject (eg Business or Management)
- appropriate work experience.

More mature learners may present a more varied profile of achievement that is likely to include extensive work experience (paid and/or unpaid) and/or achievement of a range of professional qualifications in their work sector.

Restrictions on learner entry

BTEC Advanced Professional Qualifications are accredited on the NQF for learners aged 19 years and over.

Access arrangements and special considerations

Edexcel's policy on access arrangements and special considerations for BTEC and Edexcel NVQ qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the Disability Discrimination Act 1995 and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence.

Further details are given in the policy Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications, which is on the Edexcel website (www.edexcel.org.uk). This policy replaces the previous Edexcel policy (Assessment of Vocationally Related Qualification: Regulations and Guidance Relating to Learners with Special Requirements, 2002) concerning learners with particular requirements.

The wider curriculum

The study of BTEC Advanced Professional Qualifications in Management Studies provides learners opportunities to develop an understanding of ethical, environmental, international legislative, health and safety, and equal opportunities issues. These wider curriculum opportunities are indicated in the units as appropriate.

Ethical, environmental, international, legislative, health and safety and equal opportunities issues

The specification contributes to an understanding of:

Ethical issues

Ethical issues are encountered throughout the Edexcel Level 7 BTEC Advanced Professional qualifications in Management Studies: for example, through examining issues such as innovation, in *Unit 2: Managing Change in Organisations*; managing finance, for example, in *Unit 5: Managing Financial Principles and Techniques*; and planning and leading people, for example, in *Unit 9: Culture Climate Values*.

Environmental issues

Learners are led to appreciate the importance of environmental issues as they engage in Edexcel Level 7 BTEC Advanced Professional Qualifications in Management Studies, for example in *Unit 2: Managing Change in Organisations*, *Unit 4: Strategic Planning and Implementation*, and particularly in *Unit 7: Management in the Wider Environment*.

International issues

Edexcel Level 7 BTEC Advanced Professional Qualifications in Management Studies apply throughout Europe owing to their service-orientated nature, even though the context of delivery is set within the UK. The international dimensions of management are particularly reflected in *Unit 7: Management in the Wider Environment* and *Unit 15: Managing Virtual Organisations*.

Legislative issues

Legislative issues are looked at in particular in relation to human resources, for example in *Unit 6: Human Resources Planning and Development* and *Unit 16: Managing Human Resources Policy*.

Health and safety issues

Edexcel Level 7 BTEC Advanced Professional Qualifications in Management Studies are practically based and health and safety issues are encountered throughout, but especially in *Unit 16: Managing Human Resources Policy*.

Equal opportunities issues

Equal opportunities issues are implicit throughout Edexcel BTEC Level 7 Advanced Professional Qualifications in Management Studies, but they are addressed in particular in *Unit 6: Human Resources Planning and Development*, *Unit 9: Culture Climate Values* and *Unit 16: Managing Human Resources Policy*.

Useful publications

Further copies of this document and related publications can be obtained from:

Edexcel Publications

Adamsway

Mansfield

Nottinghamshire NG18 4FN

Telephone: 01623 467 467

Fax: 01623 450 481

Email: publications@linneydirect.com

Related publications include:

- the current Edexcel publications catalogue and update catalogue
- key skills publications — specifications, tutor support materials and question papers

- *Guidance for Centres Offering Edexcel/BTEC NQF Accredited Programmes* (Edexcel, distributed to centres annually)
- *Accreditation of Prior Learning* — available on our website: www.edexcel.org.uk
- *The Statutory Regulation of External Qualifications in England, Wales and Northern Ireland* (QCA, 2004).

Edexcel publications concerning the Quality Assurance System and the internal and external verification of vocationally-related programmes may be found on the Edexcel website and in the Edexcel publications catalogue.

NB: Most of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

Professional body contact details

The Chartered Management Institute
3rd Floor
2 Savoy Court
Strand
London WC2R 0EZ

Telephone: 020 7497 0580
Fax: 020 7497 0463
Email: enquiries@managers.org.uk

How to obtain National Occupational Standards

The National Occupational Standards in Management can be obtained from:

Management Standards Centre
3rd Floor
17–18 Hayward's Place
London EC1R 0EQ

Telephone: 020 7240 2826
Fax: 020 7240 2853
Website: www.management-standards.org
Email: management.standards@managers.org.uk

Professional development and training

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

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

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches

- building key skills into your programme
- building in effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on the Edexcel website (www.edexcel.org.uk). You can request customised training through the website or by contacting one of our advisers in the Professional Development and Training team on telephone number 0870 240 9800 (calls may be recorded for training purposes) to discuss your training needs.

The training we provide:

- is active — ideas are developed and applied
- is designed to be supportive and thought provoking
- builds on best practice.

Our training will also underpin many areas of the FENTO standards for teachers working towards them.

Further information

Edexcel regularly produces policy statements on Edexcel qualifications and their accompanying procedures. Please check the Edexcel website for current information.

For further information please call Customer Services on 0870 240 9800 (calls may be recorded for training purposes) or visit our website at www.edexcel.org.uk.

Core

units

Unit 1: Advanced Professional Development

Learning hours: 30

NOF Level 7

Description of unit

This unit is designed to enable learners to take responsibility for their learning and development needs to meet personal, professional and organisational goals and objectives. This will be achieved through analysing current skills and preparing and implementing personal development plans. This unit highlights the importance of seeking feedback from others to improve performance continuously reviewing learning needs as these skills will equip the learner for future demanding responsibilities and career progression.

Evidence provided to achieve this unit will be continuous throughout the qualification, thereby enabling learners to take ownership of their future development needs. Learners will be able to demonstrate they have a regularly updated and realistic personal development plan which fits with their preferred learning style. This unit will also enable learners to evaluate the effectiveness and impact of their learning on their chosen career path.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Explore **methods to improve personal and professional skills** to meet organisational and own goals and objectives
- 2 Carry out a **personal skills audit** which identifies preferred learning style
- 3 Prepare and implement a **personal development plan**.

1 **Methods to improve personal and professional skills**

Professional skills: counselling and mentoring to support staff with their own learning and development requirements, coaching skills, multitasking, leadership skills, theories of leadership eg Adair; management styles, leadership styles, continuing self-development to meet requirements for industry sector professional bodies, leading and chairing meetings, delivering effective presentations

Personal skills: time management, what is time management, benefits of good time management, how to use time effectively, analysing time spent over a period, eg day, week, monthly logs; setting objectives, prioritising work tasks, effective delegation of tasks and monitoring, procrastination, comfort zones, dealing with interruptions to planned work, planning aids, stress management (recognising stress, dealing with stress), problem solving

Methods: using conceptual tools, identifying own strengths and limitations, developing personal networks, management development programmes, Continuing Professional Development (CPD) programmes

2 **Personal skills audit**

Skills audit: personal profile using appropriate self-assessment tools, psychometric testing, personal SWOT analysis (listing Strengths, Weakness, identifying Opportunities for improvement or career progression, identifying Threats to such progress), assessment against relevant management competence standards, importance of feedback from others, defining the gap, identifying learning and development needs to meet organisational objectives, identifying own learning style

3 **Personal development plan**

Personal development plan: strategy for developing a plan, importance of having a plan — to provide a systematic or structured approach to decisions about what is needed to learn and how to plan to learn it; setting objectives for life and career planning, identifying resources and support needed and available to meet objectives, identifying obstacles to achieving objectives and how to overcome them, review and monitor plan — the importance of self-review, provide a reflective record of management experience; gaining support from others to achieve goals and work objectives

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Explore methods to improve personal and professional skills to meet organisational and own goals and objectives	<ul style="list-style-type: none"> • evaluate the personal and professional skills required to meet both organisational and own goals and objectives • evaluate more effective ways to learn in the future
2 Carry out a personal skills audit which identifies preferred learning style	<ul style="list-style-type: none"> • undertake a personal skills audit, identifying preferred learning style, which focuses on the skills required for effective management and leadership
3 Prepare and implement a personal development plan	<ul style="list-style-type: none"> • produce a detailed personal development plan • evaluate and review the effectiveness and impact of your learning

Essential information for teachers

Delivery

This unit addresses the need for learners to become proactive and take ownership of their own personal and professional development. In order for learners to prepare a development plan and review and reflect on their management experience and development, it is recommended that this unit is either delivered first or integrated with other units on an ongoing basis.

Learners should be encouraged to plan their learning and development and to involve others in the process (eg manager, mentor, colleagues, friends, family) in order to gain feedback and support. This will enable learners to review and revise their performance and development needs to meet organisational and personal objectives. This can be achieved through a series of skills-based workshops or a residential training session for learners to analyse their personal development requirements.

Assessment

Assessment for this unit should be evidenced through a personal development plan which is monitored throughout the programme. Evidence for professional and personal skills can involve written reports and/or assignments or role plays.

It is important that learners evaluate their current skills using a skills audit and identify their preferred learning style. The personal development plan should demonstrate the learner's ability to identify the skills required for both current and likely future roles and responsibilities, reflect on their learning and development needs, identify target dates for review, and show how needs have been met.

Links

This unit has links across all the units of the qualification for improving and developing management practice, and the following units of the National Occupational Standards in Management and Leadership:

- Unit A1: Manage your own resources
- Unit A2: Manage your own resources and professional development
- Unit B6: Provide leadership in your area of responsibility
- Unit B7: Provide leadership for your organisation.

Resources

Access to the internet, psychometric testing and self-assessment interpretation and feedback is required for this unit.

Support materials

Books

Bailey K et al — *Pursuing Professional Development* (Heinle & Heinle, 2000)
ISBN: 0838411304

Earley P and Bubb S — *Leading and Managing Continuing Professional Development* (Paul Chapman Publications, 2004) ISBN: 0761943226

Harrison R — *Learning and Development* (Chartered Institute of Personnel and Development, 2002) ISBN: 0852929277

Meggison D — *Continuing Professional Development* (Chartered Institute of Personnel and Development, 2003) ISBN: 0852929900

Moon J — *Reflection in Learning and Professional Development: Theory and Practice* (RoutledgeFalmer, 2000) ISBN: 074943452X

Mumford A and Gold J — *Management Development* (Chartered Institute of Personnel and Development, 2004) ISBN: 0852929846

Treacy D — *Successful Time Management in a Week* (Hodder Stoughton, 1998)
ISBN: 0340705477

Journals/magazines

Management Today (Chartered Institute of Management)

People Management (Chartered Institute of Personnel and Development)

Websites

www.cipd.co.uk Chartered Institute of Personnel and Development

www.managers.org.uk Chartered Management Institute

www.peoplemanagement.co.uk current online magazine of the Chartered Institute of Personnel and Development

Unit 2: Managing Change in Organisations

Learning hours: 30

NQF Level 7

Description of unit

Alvin Toffler's famous comment 'There is only one constant today and that is change' was made some decades ago, but now change itself is changing at a fast rate. With such change comes uncertainty and insecurity. No longer can organisations, even in the public sector, where 'steady state' was ever the watchword, sit back. All are being increasingly challenged by change. As a result, organisations can either progress or perish.

This unit will look at the reasons for change and alternative models for its management. It will not look at change at local operational level. Rather it will focus on the need to implement processes and systems for ongoing, continuous structural and cultural change in organisations, through such methods as organisational development, business process re-engineering and the learning organisation model. In effect, it will ask learners to look to developing organisational models that challenge the bureaucracy of the past age.

Therefore, this unit will help learners come to realise that the ongoing management of change is really today the crucial role of any manager and requires a more open and participate approach. This, in turn, requires more than the traditional hierarchical skills of the old bureaucratic or mechanistic models of organisations.

*This unit is a core unit for only the Certificate and Diploma.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Explore the **background to change** affecting the current organisation
- 2 Develop **systems for understanding and involving others in the process of change**
- 3 Plan to **implement models for ensuring ongoing change**.

Content

1 **Background to change**

Factors: bureaucracy, hierarchy, mechanistic versus organic, scientific management, human relations school, Fordism; knowledge age, environmental turbulence, planned and emergent change, organisational life-cycle and development, strategy-structure fit, formal versus informal organisation

2 **Systems for understanding and involving others in the process of change**

Systems: stakeholder analysis, systems modelling, systems and sub-systems, input-transformation-output modelling, multiple cause diagrams, 'tropics' factors, configuration, divergence and convergence, functional and divisional structures, cultural web, images of organisations, team development, influencing skills, awareness raising, commitment development

3 **Implement models for ensuring ongoing change**

Models: organisational development, business process re-engineering, learning organisation, Kaizen, layering and right-sizing, matrix organisations, network organisations, adhocracy, virtual organisation, push and pull strategies, conflict handling, transformational leadership, empowerment, contextual planning, contingency planning

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Explore the background to change affecting the current organisation	<ul style="list-style-type: none"> • discuss the background to change that exists in today's economy • evaluate the strengths and weaknesses of bureaucratic organisations • compare alternative forms of organisational development
2 Develop systems for understanding and involving others in the process of change	<ul style="list-style-type: none"> • develop systems to involve appropriate stakeholders in the introduction of change • analyse and evaluate these systems
3 Plan to implement models for ensuring ongoing change	<ul style="list-style-type: none"> • develop and adapt appropriate models for change • plan the implementation process and outcomes

Guidance

Delivery

The unit requires considerable input initially but thereafter for the learner to take an active, participative role in the understanding, analysing and planning for the implementation of a change process that will radically change and update the organisation and ensure it is better placed to survive, compete and progress in the current economic climate. In other words it needs to ensure that students look beyond ‘single loop’ thinking towards challenging the existing organisational values and practices.

Even if working within their own organisations or linked individually into another organisation, group learning needs to be encouraged to encourage cross-fertilisation of perspective, approach and practice.

Assessment

Evidence of outcomes may be in the form of at least two of the following:

- direct involvement in the development of radical change in an organisation known to the student
- an investigation into the practices of one organisation undergoing radical change
- a reflective report following placement in an organisation managing radical change
- participation in a group learning process looking to compare radical change processes in a range of organisations followed by an individual report of learning
- a presentation justifying to an organisation a particular plan for radical change
- a report of a professional discussion on any of the above.

Links

This unit underpins every unit in this programme as change is fundamental to managing any organisation effectively. However, it has particular links to *Unit 4: Strategic Planning and Implementation* and *Unit 3: Management Research — Project and Presentation*. It also has links to Edexcel Level 4 BTEC Professional Qualifications in Management Studies, *Unit 5: Managing Change*.

The unit will provide knowledge and understanding for many units within the National Occupational Standards in Management, eg:

- Unit B7: Provide leadership for your organisation
- Unit C4: Lead change
- Unit C5: Plan change
- Unit C6: Implement change
- Unit D2: Develop productive working relationships with colleagues and stakeholders.

Resources

Access to local organisations is important with a case study library as back up. In addition, speakers from local organisations can prove beneficial. Access to textbooks, journals, newspapers and websites is essential.

Sufficient library resources need to be available to enable learners to achieve this unit. Learners need to be encouraged to read 'broadsheet' daily newspapers and weekly business magazines.

Support materials

Books

There is a wide range of books and other useful texts on the market and the list below is indicative. The list includes some standard texts that need to be used appropriately as well as some other texts that include case studies.

Belasco J A — *Teaching the Elephant to Dance* (Century Business, 1992) ISBN: 0712655395

Burnes B — *Managing Change: A Strategic Approach to Organisational Dynamics* (FT Prentice Hall, 1995) ISBN: 0273611186

Carnall C — *Managing Change in Organisations* (FT Prentice Hall, 2002) ISBN: 0273657356

Henry J and Mayle D (editors) — *Managing Innovation and Change* (Open University Business School/Sage, 2002) ISBN: 0761966099

Kotter J and Cohen D S — *The Heart of Change; Real Life Stories of How People Change Their Organisations* (Harvard Business School Press, 2002) ISBN: 1578512549

Mabey C and Maynon-White B (editors) — *Managing Change* (Paul Chapman Publishing, 1993) ISBN: 1853962260

Plant R — *Managing Change and Making it Stick* (Harper-Collins 1987) ISBN: 0006368735

Senior B — *Organisational Change* (FT Prentice Hall, 2001) ISBN: 02736251536

Smith D K — *Taking Charge of Change* (Perseus Books, 1997) ISBN: 0201916045

Journals/magazines

Academy of Management Journal (Academy of Management)

British Journal of Management (Blackwell)

California Management Review (University of California, Berkeley)

European Management Journal (Elsevier)

Harvard Business Review (Harvard Business School)

Journal of General Management (Braybrooke Press Ltd)

Journal of Management Studies (Blackwell)

Management Today (Chartered Institute of Management)

MIT Sloan Management Review (MIT Sloan School of Management)

Websites

Appropriate websites available will depend on the sector, market and organisation chosen. However, an indicative range of general websites is given below.

www.bbc.co.uk	British Broadcasting Corporation
www.bized.co.uk	learning materials and case studies
www.business.com	business search engine on business background
www.cipd.uk	Chartered Institute of Personnel and Development
www.enterprisenetworks.co.uk	Enterprise networks, advice on communications networks
www.findarticles.com	Looksmart — search for from more than 500 publications
www.ft.com	Financial Times Archive
www.direct.gov.uk	UK Online, Office of the e-Envoy
www.i-l-m.com	Institute of Leadership and Management
www.managers.org.uk	Chartered Institute of Management
www.mintel.co.uk	Mintel International on consumer markets
www.statistics.gov.uk	UK National Government Statistics

Unit 3: Management Research – Project and Presentation

Learning hours: 30

NQF Level 7

Description of unit

The purpose of this unit is to provide learners with an opportunity to integrate all the learning from the whole programme. This unit, together with *Unit 10: Management Research Methods*, recognises the importance of effective project management in today's economy. The fact that there are two units on the subject recognises the scale of work that is required to develop and implement a sound project. Learners can take either unit without the other, but may find it necessary to start with *Unit 10* before tackling this unit if they have no experience of research methodology.

As the rate of change escalates, it is important for organisations to not just hold their place in the market but to plan to move ahead. This unit recognises the importance for managers to have project management skills and expertise to enable this to happen. In effect, this unit requires managers to plan the implementation of a new product, service or process.

Learners need to take a full and active role in all aspects of the development of the project and the selection of an appropriate management issue is crucial to success. The learners cover a full range of management activities and roles including resource and people management and implementation of change. The result needs to be a substantial report of a style appropriate for the consideration of senior management.

This unit is only a core unit for the Diploma.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Identify **the development of a new product, service or process** in terms of overall profitability
- 2 Calculate, agree and plan for the **necessary resources** required for the project
- 3 Plan and agree the **implementation of the product, service or process and the measures for monitoring and evaluating success**.

Content

1 The development of a new product, service or process

Development: defining the product, service or process, developing a business case, case justification, primary and secondary sources, official sources, tacit knowledge, project lifecycle, added value, market and customer expectations, profit margins and vulnerability, market analysis, benchmarking, networking, stakeholder analysis, scoping process, political dimensions, informal contacts and networking, relationship to corporate strategy and planning, sustainability, MIS (market intelligence systems), environmental scanning, market research, market segmentation

2 Necessary resources

Resources: economy, efficiency and effectiveness, cost dimensions — labour, training and development, materials, supplies, their sources, equipment hire, accommodation or space, delivery, accessing funds, overheads, administration, budgeting and cash flow, cost margins, sources and evaluation of training and development, workforce planning, cost benefit analysis, contingency factors

3 Implementation of the product, service or process and the measures for monitoring and evaluating success

Implementation: market or pilot testing, leadership, delegation and motivation, teambuilding, stages breakdown, developing specifications, Gantt chart, PERT/CPA modelling, quality control and analysis, total quality management, quality chain, milestone charting, auditing, integration and negotiation roles, developing feedback systems, communication systems, time management, progress meetings, corrective measures, allocating project roles, variance analysis, bottlenecks, contracting, pricing policy, differentiation, market positioning and strategy, packaging, promotion and advertising, distribution costs, branding

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Identify the development of a new product, service or process in terms of overall profitability	<ul style="list-style-type: none"> • develop a business case for a new product, service or process built upon recent research • review current theoretical debate that supports this business case • incorporate into this business case information on market competitiveness and activity
2 Calculate, agree and plan for the necessary resources required for the project	<ul style="list-style-type: none"> • identify and cost all materials, equipment, labour and other resources required for developing the product, service or process • identify and cost the training and development of staff required • identify sources of all resources required
3 Plan and agree the implementation of the product, service or process and the measures for monitoring and evaluating success	<ul style="list-style-type: none"> • plan and agree the timescale for management and implementation of the project, service or process • plan and develop an appropriate marketing strategy for this implementation • develop appropriate measures to monitor and evaluate progress

Guidance

Delivery

The choice of the project itself is the crucial factor for success in this unit and considerable attention needs to be paid to learners' choice of project. They need to take an active part, if not the lead. The integration of learning from across the programme is the basis of this unit so ensuring that the project will draw on other units is essential.

While it is possible for the project to be based on a case study, if there is no possible alternative, a real workplace issue is much more valuable as a learning opportunity. Learners currently not in employment, or in employment where such project work is not available, could be seconded to an organisation where a suitable project can be agreed.

This unit needs little teaching in-put, as such, but does need ongoing one-to-one supervision by a suitable project supervisor, as well as opportunities for regular discussion with appropriate workplace personnel.

Assessment

Assessment to be based on the following:

- the completed management project report
- the presentation and its visual aids
- a report by the learner reflecting on the learning from the whole process.

Links

The unit, by being integrative, provides opportunities for learners to demonstrate knowledge and understanding developed from across all other units. The unit follows on from *Unit 10: Management Research Methods* and from *Unit 7: Managing Projects* from the Level 4 BTEC Professional Qualifications in Management Studies. It is closely related to *Unit 2: Managing Change in Organisations* but is related more to product, service or process introduction than operational or organisational development and change. It also links to *Unit 4: Strategic Planning and Implementation* although that is more concerned with overall organisational direction, and to *Unit 13: The Creative Manager* which is looking at innovative management approaches and styles.

The unit will provide knowledge and understanding for many units within the National Occupational Standards in Management, in particular:

- Unit B1: Develop and implement operational plans for your area of responsibility
- Unit B3: Develop a strategic business plan for your organisation
- Unit B4: Put the strategic business plan into action
- Unit F1: Manage projects
- Unit F4: Develop and review a framework for marketing
- Unit F12: Improve organisational performance.

Resources

Learners will need access to the internet and to appropriate organisations and case studies for learning and comparison.

Sufficient library facilities need to be available to enable learners to achieve this unit. In addition, learners need to regularly read the broadsheet press and weekly business magazines.

Support materials

Books

There is a growing range of books and other useful texts on the market and the list below is indicative. The list includes standard texts, that need to be used appropriately, as well as some other texts that include case studies. The year of first publication has been included below, but many texts have been reprinted and updated over the years and the use of latest editions is encouraged.

Aygerou C — *Information Systems and Global Diversity* (Oxford University Press, 2003) ISBN: 0199263426

Boddy D, Marrakas A and Kennedy G — *Managing Information Systems; An Organizational Perspective* (FT Prentice Hall, 2004) ISBN: 0273655957

Drucker P F (editor) — *Harvard Business Review on Decision Making* (Harvard Business School, 2000) ISBN: 1578515572

Kovacic B — *New Approaches to Organizational Communication* (State University of New York Press, 1994) ISBN: 0791419185

Little S, Quintas P and Ray T — *Managing Knowledge: An Essential Reader* (Sage Publications, 2001) ISBN: 0761972137

March J G — *Primer on Decision Making; How Decisions Happen* (Free Press, 1994) ISBN: 0029200350

McKenzie J and van Winkelen C — *Understanding the Knowledgeable Organisation* (Thomson Learning, 2003) ISBN: 1861528957

Preston P — *Reshaping Communications* (Sage Publications, 2001) ISBN: 0803985630

Quirke B — *Communicating Corporate Change* (McGraw-Hill, 1996) ISBN: 0077093119

Stewart T A — *Intellectual Capital: The New Wealth of Organisations* (Nicholas Brearley Publishing Ltd, 1998) ISBN: 1857881834

Welch D — *Decisions, Decisions: The Art of Decision Making* (Prometheus, 2001) ISBN: 1573929341

Journals/magazines

Most general management journals contain relevant articles and these have been included in the list below along with specialist journals

Academy of Management Journal (Academy of Management)

British Journal of Management (Blackwell)

California Management Review (University of California, Berkeley)

Harvard Business Review (Harvard Business School)

Information Management (Elsevier)

Information Technology and People (Emerald, Bradford)

International Journal of Information Management (Pergamon Press)

Journal of Information Technology (Association of Information Technology Trust/Routledge)

Journal of Management Studies (Blackwell)

Knowledge Management (Arkgroup)

Management Today (Chartered Institute of Management)

MIT Sloan Management Review (MIT Sloan School of Management)

Organisation Studies (Sage Publications)

Organisations (Sage Publications)

Videos

BBC and The Centre for Tomorrow's Company 'Communications' from the 'Building Tomorrow's Company' series (1999), available from:

235 Blackfriars Road
London SE1 8NW

Telephone: 020 7021 0550

Fax: 020 7021 0549

Email: info@tomorrowscompany.com

Website: www.tomorrowscompany.com

Websites

The range of appropriate websites available will depend on the sector, market and organisation chosen. However, an indicative range of more general websites is given below.

www.bbc.co.uk	British Broadcasting Corporation
www.bized.co.uk	business case studies for educational purposes
www.business.com	business search engine on business background
www.cipd.uk	Chartered Institute of Personnel and Development
www.enterprisenetworks.co.uk	Sunday Times Archive
www.findarticles.com	Looksmart — search for articles from more than 500 publications
www.ft.com	Financial Times Archive
www.gov.uk/www.direct.gov.uk	UK Online, Office of the e-Envoy
www.i-l-m.com	Institute of Leadership and Management
www.kmmagazine.com	<i>Knowledge Management</i> magazine
www.managers.org.uk	Chartered Institute of Management
www.mintel.co.uk	Mintel International on consumer markets
www.statistics.gov.uk	UK National Government Statistics

Specialist units

Unit 4: Strategic Planning and Implementation

Learning hours: 30

NQF Level 7

Description of unit

This unit together with *Unit 11: Strategic Review*, recognises the importance of effective forecasting and planning in the current global economy. Organisations need to be proactive, with their direction determined by logical analysis. It is not always possible to calculate accurately future events but without any sense of progression it is easy to lose competitiveness, market position and customer loyalty.

Learners are required to plan and develop the implementation of a management strategy for an organisation they know well. Learners will need to interact with senior management and stakeholders as the emphasis is on a participative approach.

Strategy is split between this unit and *Unit 11: Strategic Review* in recognition of the amount of work required for successful strategic planning. Learners can take either unit without the other, but may find it more appropriate to start with this unit before tackling *Unit 11*.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Construct a **management strategy**
- 2 Develop **vision, mission, objectives and measures**
- 3 Plan for the **implementation of the strategy**.

Content

1 **Management strategy**

Management strategy: reviewing options; attractiveness to stakeholders; stakeholder participation; criteria for judging options; feasibility studies; risk assessment; reviewing additional recent material; cost benefit analysis; consistency with organisational values; effects on market position and share; costs and investments; opportunity costs; scenario planning; simulation modelling; sensitivity analysis; balanced scorecard approach; potential globalisation and internet advantages; financial, workforce, and identification of other resources issues

2 **Vision, mission, objectives and measures**

Vision vs mission: core organisational values eg ethical, cultural, environmental, social and business; growth, profit, customer orientation, workforce expectation, management style

Objectives and measures: SMART(ER) objectives; business ethics; raising awareness; promoting good practice; role modelling; stakeholder involvement; managing diversity; spiritual and cultural issues; environmental considerations

3 **Implementation of the strategy**

Planning: gaining general organisational agreement, organisational development, timetable for implementation, business process re-engineering, management by objectives, action planning, performance appraisal, structure and strategic fit, developing policy, communication systems, guidelines, focus and realignment, contingency planning, monitoring and evaluation control systems, dissemination and cascading processes

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Construct a management strategy	<ul style="list-style-type: none"> • propose a suitable structure to ensure appropriate participation in the process • develop criteria for reviewing potential options • construct an agreed strategy and include its resource implications
2 Develop vision, mission, objectives and measures	<ul style="list-style-type: none"> • consider the organisation's ethical, cultural, environmental, social and business background against current standpoints • develop appropriate vision and mission statements • agree appropriate objectives and develop measures for evaluation
3 Plan for the implementation of the strategy	<ul style="list-style-type: none"> • develop outline timetable for implementation • create appropriate dissemination processes to gain commitment • set up monitoring and evaluation systems

Guidance

Delivery

Throughout the delivery of this unit it is essential that learners apply their learning and understanding of the processes of strategic planning and implementation to a real organisation they know or are familiar with. The objective is not just to learn and understand the range of tools and concepts used in strategic planning and implementation but to realise that the strategic plan and implementation systems developed must be integrated to provide success.

Whilst some input sessions and discussion are needed to help learners familiarise themselves with the theoretical tools and concepts, learners need to be encouraged to research and compare findings in groups. Throughout, the emphasis will be on using recognised models and analytical tools to develop an understanding of the environmental factors affecting the organisation and its current performance in its existing sector or market.

The unit could be delivered jointly with *Unit 11: Strategic Review*. Learners could use *Unit 11: Strategic Review* as the basis of this unit, or they could use existing sources and experience from within their organisation. Learners could work in pairs or even small teams for this unit but this will require the selection of an organisation with appropriate breadth and depth of interest and activity as well as potential for development.

Assessment

The unit, by definition, requires the development of a plan for the implementation of a strategy on which assessment needs to be based. However, learners also need to be assessed on the learning that took place in relation to the participation with others and the integration of separate factors and this can be assessed by a reflective report, oral presentation or professional discussion.

Links

The natural link here is to *Unit 11: Strategic Review*, but in reality there are links to all other units in this programme, as this unit needs to incorporate, to a greater or lesser degree, some consideration from all areas and functions of organisational management. However, *Unit 2: Managing Change in Organisations*, *Unit 7: Management in the Wider Environment*, *Unit 15: Managing Virtual Organisations*, *Unit 17: Strategic Marketing Management* and *Unit 18: Developing a Communication Strategy* are all closely allied.

Links can be made to the National Occupational Standards in Management, in particular:

- Unit B3: Develop a strategic business plan for your organisation
- Unit B4: Put the strategic business plan into action
- Unit F12: Improve organisational performance.

Resources

Access to local organisations is the most valuable resource here with a case study library as back up. Local speakers can also prove beneficial. Access to books, journals, newspapers and websites is essential.

Support materials

Books

There is a wide range of books and other useful texts on the market and the list below is purely indicative. The list includes some standard texts that need to be used appropriately, as well as some other texts that include case studies. The year of first publication has been included, but many have been reprinted and updated over the years and the use of latest editions is encouraged.

Asch D and Bowman C — *Readings in Strategic Management* (Palgrave Macmillan, 1989)
ISBN: 0333518098

Caplan R and Norton D — *The Strategy-focused Organization* (Harvard Business School Press, 2000) ISBN: 1578512506

Cusumano M and Markides C — *Strategic Thinking for the Next Economy* (Jossey Bass, 2001)
ISBN: 0787957291

Grant R — *Contemporary Strategy Analysis* (Blackwell, 2004) ISBN: 1405119993

Gratton L — *Living Strategy: Putting People at the Heart of Corporate Purpose* (Prentice Hall, 2000) ISBN: 0273650157

Harrison J — *Strategic Management of Resources and Relationships: Concepts and Cases* (Wiley, 2002) ISBN: 0471222925

Johnson G and Scholes K — *Exploring Corporate Strategy* (Prentice Hall, 2003)
ISBN: 0582844495

Johnson G and Scholes K — *Exploring Public Sector Strategy* (Prentice Hall, 2000)
ISBN: 0273646877

Kaplan R and Norton D — *The Strategy-focused Organization: How Balanced Scorecard Companies Thrive in the New Business Environment* (Harvard Business School Press, 2000)
ISBN: 1578512506

Lynch R — *Corporate Strategy* (Prentice Hall, 2002) ISBN: 0273658549

Mintzberg H — *The Rise and Fall of Strategic Planning* (Prentice Hall, 2000)
ISBN: 0273650378

Mintzberg H, Ahlstrand B and Lampel J — *Strategy Safari: A Guided Tour through the Wilds of Strategic Management* (Prentice Hall, 2001) ISBN: 0273656368

Pettigrew A, Thomas H and Whittington R — *The Handbook of Strategy and Management* (Sage, 2001) ISBN: 0761958932

Schwartz P — *The Art of the Long View* (Wiley, 1997) ISBN: 0471977853

Stacey R — *Strategic Management and Organisational Dynamics* (Prentice Hall, 2002)
ISBN: 0273658980

Journals/magazines

Most management journals contain some articles at least on the subject and have been included together with more specialised journals

Academy of Management Journal (Academy of Management)

British Journal of Management (Blackwell)

California Management Review (University of California, Berkeley)

European Management Journal (Elsevier)

Harvard Business Review (Harvard Business School)

Journal of Business Strategy (Blackwell)

Journal of Management Studies (Blackwell)

Long Range Planning (Elsevier)

MIT Sloan Management Review (MIT Sloan School of Management)

Strategic Change (John Wiley & Sons Ltd)

Strategy and Leadership (Emerald)

Websites

A number of websites is available depending on the sector, market and organisation chosen.

www.ft.com Financial Times

www.managers.org.uk Chartered Institute of Management

www.sps.org.uk Strategic Planning Society

Unit 5: Managing Financial Principles and Techniques

Learning hours: 30

NOF Level 7

Description of unit

This unit is the first of two that provide learners with a foundation in financial principles and techniques relevant to the strategic management process. In this unit, the focus is on the management of costs through the use of forecasting, appraisal and financial reporting procedures. The main objective is to provide learners with the tools and confidence to apply, analyse and evaluate financial information. This will enhance their decision-making skills through the use and validation of forecasting techniques, and the consideration of financial statements.

To complete this unit effectively learners will need to show an ability to judge the sources, nature, accuracy and completeness of cost-based information. They will also need to apply strategies associated with determining sound management information with reference to the sources of funds, the potential investment of resources, and the interpretation of financial statements.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Apply relevant **forecasting** techniques to obtain information for decision making
- 2 Examine and apply the **financial appraisal techniques** used to evaluate potential investment decisions
- 3 Interpret **financial statements** for planning and decision making.

Content

1 **Forecasting**

Forecasting: forecasting costs, cash flow forecasts, forecasting techniques of scattergraph, time series, linear regression, forecasting and price movements, using indices, limitations of index numbers, forecasting problems, recommendations

Funds: sources, supporting proposals for obtaining funds internally and externally, gearing ratios, effect of different types of funding on shareholder and market perception, selecting appropriate sources of funds for different projects, comparison of costs

2 **Financial appraisal techniques**

Investment: definition, capital and revenue expenditure, types and interaction with risk, sensitivity analysis

Investment appraisal: accounting rate of return; payback period and cash flows, discounted cash flow — net present value and internal rate of return, time value of money and allowance for inflation in money and real rates of discount, taxation and project appraisal, post audit

Public sector capital budgeting: social and ethical costs and benefits and the use of cost benefit analysis

3 **Financial statements**

Statements: estimates and assumptions relating to the profit and loss account, balance sheet and cash flow statement, use of spreadsheets in financial planning, financial resources audits and the use of balanced scorecards — Kaplan and Norton

Financial ratios: employment of financial ratios internally and externally, financial profiles of businesses, calculation of key relationships reflecting business liquidity, efficiency and profitability

Interpretation and limitations of ratio analysis: emphasis on the interpretation of ratios and encouragement of the use of contingency and risk analysis to justify decisions

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Apply relevant forecasting techniques to obtain information for decision making	<ul style="list-style-type: none"> • select and use appropriate forecasting methods to enable cost and revenue forecasts to be constructed for an organisation, adjusting for expected movements such as price changes • identify and appraise the sources of funds available to an organisation, and make proposals for obtaining funds for a specific project or resource
2 Examine and apply the financial appraisal techniques used to evaluate potential investment decisions	<ul style="list-style-type: none"> • use current appraisal methods to analyse competing investment projects in the public and private sector and make justifiable decisions • select appropriate and relevant financial information for use in the process of making strategic decisions on investment • make recommendations based on a post-audit appraisal on the appropriateness of selected investment project decisions
3 Interpret financial statements for planning and decision making	<ul style="list-style-type: none"> • analyse financial statements using relevant techniques to assess the financial viability of an organisation • carry out a performance audit of an organisation including reference to internal and external factors • use appropriate calculations to improve the quality of financial information used • make recommendations on the strategic portfolio of an organisation based on the interpretation of financial and ancillary information

Guidance

Delivery

This unit enables learners to enhance and refine techniques commonly used to improve financial decision making as part of the strategic management process. It is essential that learners are encouraged to relate the focus of the unit to their own organisation. Research will be necessary in terms of the principles identified but application must be current and relevant and learners should be invited to use work-related experiences and projects. In certain circumstances, respecting the degree of confidentiality demanded, learners may be able to compare and contrast competing organisations operating within different economic sectors. Additionally, the use of case studies and current examples of issues within the public domain should be encouraged.

Delivery of this unit lends itself to seminars and learner-led discussions on alternatives and decisions associated with forecasting, investment or other project appraisal cost control and interpretation of financial information. Analysis should incorporate potential contingency and risk factors. This development will enhance the ability of the learner to adopt a holistic approach to the content of other units in the course such as *Unit 2: Managing Change in Organisations* and *Unit 14: Managing Finance for Strategic Managers*.

Discussion of the validity of certain forecasts or investment projects, and/or the selection and presentation of financial information, can be used positively to illustrate social or ethical influences or opportunity cost considerations which pervade most financial decisions.

Assessment

Assessment for this unit should reflect the learning outcomes and be set in context. The practical nature of the unit lends itself to tasks and exercises which will cover the forecasting, appraisal and analytical techniques available to managers. Tasks set may involve individual or group work with the opportunity to introduce a case study to enhance realism. However, where possible, learners should be using information, examples and research which involve their own organisations or those with which they are familiar. Learners will be producing evidence of research into different approaches to forecasting, project appraisal and interpretation of summarised financial information, and competence in the use and interpretation of appraisal and financial techniques.

Learners should be able to provide clear explanations of the function of forecasting and appraisal tools in the managerial decision-making process, giving relevant examples of current business practice. Thus, all learners should be able to carry out and interpret forecasting techniques, compare and contrast information arising from project appraisal and calculate ratios, using appropriate spreadsheet presentations.

The findings of learners' research, as related to the assessment mechanism used, should be presented logically and indicate some awareness of the application within the business context. Thus it would be appropriate at this level to expect outline summaries and reasoning in a report format.

Links

This unit links with *Unit 14: Managing Finance for Strategic Managers*.

There are also links with units within the National Occupational Standards in Management, in particular:

- Unit E2: Manage finance for your area of responsibility
- Unit E3: Obtain additional finance for the organisation
- Unit F12: Improve organisational performance.

Support materials

Books

Atrill P and McLaney E — *Management Accounting for Non-specialists, Third Edition* (FT Prentice Hall, 2002) ISBN: 0273655914

Berry A and Jarvis R — *Accounting in a Business Context* (Thomson Business Press, 1997) ISBN: 1861520905

Cox D and Fardon M — *Management of Finance* (Osborne Books, 1997) ISBN: 1872962238

Glynn J, Perrin J and Murphy M — *Accounting for Managers* (Thomson Learning, 2003) ISBN: 186152904X

Harris R — *Applied Time Series Modelling and Forecasting* (Wiley, 2003) ISBN: 0470844434

Lumby S and Jones C — *The Fundamentals of Investment Appraisal* (Thomson Learning, 2000) ISBN: 1861526075

Makridakis S et al — *Forecasting, Third Edition* (Wiley, 1998) ISBN: 0471532339

Pettinger R — *Investment Appraisal: A Managerial Approach* (Palgrave Macmillan, 2000) ISBN: 0333800591

White G I — *The Analysis and Use of Financial Statements* (Wiley, 2003) ISBN: 074142918X

Journals/magazines/newspapers

Newspapers can be a useful source for financial issues in both the private and public sector. Specialist periodicals also provide current articles on developments in related topic areas. Examples include:

The Financial Times

The Guardian

The Independent

Management Accounting Quarterly (Institute of Management Accountants, quarterly journal)

Management Today (Chartered Institute of Management magazine)

Strategic Finance (Institute of Management Accountants, monthly magazine)

The Times

Websites

Websites provide useful information, case studies and examples of the application of financial techniques in business situations. Company reports can be accessed and ordered through the *Financial Times* website or through the Registrar of Companies, whose website contains useful information on the style of reporting for company accounts and information on the content of company reports. Public limited companies have websites, which normally give access to their published accounts and accompanying reports.

Most of the professional accounting bodies (CIMA, ICA, CIPFA, AAT) have their own websites with access to library facilities (although if you are not a member, access may be restricted).

www.aat.co.uk	Association of Accounting Technicians
www.bized.ac.uk	learning materials and a wide range of company information
www.cimaglobal.com	Chartered Institute of Management Accountants
www.cipfa.org.uk	Chartered Institute of Public Finance and Accountancy
www.companies-house.gov.uk	Companies House home page
www.guardian.co.uk	an example of a broadsheet paper's website containing financial information
www.icaew.co.uk	Institute of Chartered Accountants in England and Wales
www.icsa.org.uk	Institute of Chartered Secretaries and Administrators
www2.marksandspencer.com/thecompany	an example of a company website containing information on its published accounts
www.thetimes100.co.uk	a series of company case studies

Unit 6: Human Resources Planning and Development

Learning hours: 30

NQF Level 7

Description of unit

This unit will enable learners to focus on the knowledge, understanding and skills necessary for the planning and development of an organisation's human resources (HR). Learners will research the role of the HR function, analyse HR planning and development methods and how they contribute to organisational objectives and requirements, and analyse performance enhancements.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Investigate how **Human Resources Management (HRM)** contributes to the achievement of organisational objectives
- 2 Examine **HR planning and development** methods
- 3 Analyse ways in which **performance** of HR may be enhanced.

Content

1 Human Resources Management (HRM)

Human resource management: definition, characteristics of HRM approach, models of HRM eg contingency model, best practice model, Harvard Framework, Guest, Patterson; key HRM activities, HRM and personnel management, HR consultancy

Human resource (HR) function: the role of the HR practitioner, models of HR management roles eg Legge, Tyson and Fell; activities eg guidance, advice, service provision, redeployment and outplacement, redundancy processes and procedures, organisational and legal constraints, integration to different organisational objectives, evaluating the HR function

2 HR planning and development

Human resource planning: functions and roles of HR planning, recruitment and selection processes and methods eg defining requirements, advertising approaches, selection methods, interviewing, evaluating the effectiveness of recruitment and selection processes, legislation relating to recruitment and selection

Human resource development: definition of human resource development (HRD), organisational learning, learning organisation, learning theory eg learning cycle, transfer of learning; identifying and developing effective training methods for people to achieve organisational objectives through training needs analysis, eg on-the-job training, off-the-job training, in-house training, management training; internal training courses, secondments, job rotation, open/distance learning, day release, seminars, workshops, evaluating effectiveness of training delivered

3 Performance

Performance: performance — monitoring methods eg performance appraisal, appraisal procedures and techniques, enhancement processes, reward management eg job evaluation purpose and methods, factors determining pay; motivation and job satisfaction, strategies for addressing under-performance eg discipline and grievance procedures, ACAS Codes of Practice; measures of staff satisfaction eg absenteeism, turnover rates, poor quality work, mechanisms for staff involvement and empowerment, methods of improvement

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Investigate how Human Resources Management (HRM) contributes to the achievement of organisational objectives	<ul style="list-style-type: none"> • identify three key HRM activities of an identified organisation • justify how the objectives of these were achieved by effective management of human resources • refer to at least two HRM models
2 Examine HR planning and development methods	<ul style="list-style-type: none"> • for an identified organisation select at least three HR planning and development methods • critically evaluate their effectiveness to meet organisational objectives
3 Analyse ways in which performance of HR may be enhanced	<ul style="list-style-type: none"> • critically review how HR performance in an identified organisation is currently indicated and monitored • suggest ways to improve this

Guidance

Delivery

This unit is designed to relate a theoretical understanding of Human Resource Management (HRM) to a practical investigation of the function within an organisation with which the learner is familiar with. Learners will have the opportunity to combine academic research with principles and models of HRM, and relate these to their own work environments or to an organisation with which they are familiar.

The unit will benefit from being delivered with a range of strategies — case studies, group discussion, guest speaker HR practitioners and visits to both public and private sector organisations to compare practices and results. Role plays could also be used for an employee appraisal interview. Learners should identify the training philosophy of the organisation, and understand how and why the training is evaluated.

Assessment

Assessment may be in the form of assignments, investigations of specific business organisations or case studies.

Links

This unit has links to units within the National Occupational Standards for Management, in particular:

- Unit B7: Provide leadership for your organisation
- Unit B8: Ensure compliance with legal, regulatory, ethical and social requirements
- Unit B12: Promote diversity in your organisation
- Unit D1: Develop productive working relationships with colleagues
- Unit D2: Develop productive working relationships with colleagues and stakeholders.

Resources

The following resources are recommended:

- case study materials
- visiting human resource practitioners
- visits to other organisations
- internet access for up-to-date legislation and information.

Support materials

Books

Armstrong M — *A Handbook of Human Resource Management Practice* (Kogan Press, 2003) ISBN: 0749441054

Beardwell I and Holden L — *Human Resource Management: A Contemporary Approach* (Prentice Hall, 2003) ISBN: 0273679112

Belbin M — *Team Roles at Work* (Butterworth-Heinemann, 1996) ISBN: 0750626755

Bratton J and Gold J — *Human Resource Management: Theory and Practice* (Palgrave-Macmillan, 2003) ISBN: 0333993268

Mullins L — *Management and Organisational Behaviour* (Prentice Hall, 2004) ISBN: 0273688766

Journals/magazines

Management Today (Chartered Management Institute)

People Management (Chartered Institute of Personnel and Development)

Websites

www.acas.org.uk	this site contains current ACAS leaflets and publications, advice, training and other employment information
www.bized.ac.uk	learning materials and case studies
www.cipd.co.uk	this site contains information about HR practices and current legislation relating to employment
www.managers.org.uk	website for the Chartered Management Institute
www.peoplemanagement.co.uk	current online magazine of the Chartered Institute of Personnel and Development

Unit 7: Management in the Wider Environment

Learning hours: 30

NQF Level 7

Description of unit

The increase in information and communication technology, the consequent globalisation of markets and competition and the need to respect today's more diverse society means that organisations have to ensure they are more aware of the wider environment. Managers need to be much more concerned with the cultural, moral, ethical, spiritual and environmental effects of their activities, to ensure that these do not cause conflict within their sphere of operations. In addition, managers need to be aware of current and developing national and European legislation.

The need for corporate social responsibility or governance lies at the heart of this unit. Its objective is to encourage managers to look beyond organisational success and progress, and to realise the importance of respecting and taking responsibility for societal values in general. It looks at this through a number of spheres — global, international and European, legal, environmental, social, cultural, ethnic and moral, including the need to enhance the welfare of the workforce generally.

This unit is, designed to help managers realise the implications of 'wider curriculum'. The unit will also help them to respond to the increasing expectation of society that all decisions, policies, processes and activities undertaken by organisations take into account standards beyond business success.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Examine **the wider implications and effects of European and global integration on organisations**
- 2 Investigate **the range and effects of environmental legislation, directives and guidance and the processes organisations need to adopt**
- 3 Explore **the socio-cultural, ethical and moral issues that affect organisations in the current economic environment to establish and implement good practice.**

Content

1 The wider implications and effects of European and global integration on organisations

European and global integration: corporate social responsibility, human rights, corporate values, international institutions — World Bank, IMFR, GATT, WTO, OECD, cultural imperialism and hegemony, sovereignty, intensification and ‘interpenetration’, deregulation, technological determinism, enmeshment and marginalisation, foreign direct investment, MNCs and TNCs, core and periphery economies, corporate governance, comparative practice, developing business relationships, respecting other cultures

European Union: role, responsibility, membership, European directives and legislation, the principle of subsidiarity, effects of enlargement, welfare provision

2 The range and effects of environmental legislation, directives and guidance and the processes organisations need to adopt

Environmental legislation: European legislation, European Social Fund, employment mobility legislation, education and training provision, Investors in People, LSEs

Processes: green debate, biodiversity, environment degradation, decentralised management, ecological controlling and accounting, ecological modernisation theory, externalities, public goods, free goods, organic management, risk management, genetic engineering, Gaia theory, ecological and anthropocentric world views, global warming, toxic waste and pollution, health and safety at work, accident prevention, corporate responsibility, employment contracts, implied terms, employer’s duty of care

3 The socio-cultural, ethical and moral issues that affect organisations in the current economic environment to establish and implement good practice

Social, cultural, ethical and moral issues and implementing good practice: managing diversity, workforce profiling, equal opportunities, equal opportunity legislation, dignity in the workplace, multi-culturalism, racism, harassment, bullying and whistle-blowing, privacy, confidentiality, contracts of employment and implied terms, stereotyping and labelling, political correctness, prejudice, ethnicity, disability, direct and indirect discrimination, ‘glass ceiling’, institutional racism, positive action, civil rights, Citizen’s Charter, moral imperatives, value rigidity, empowerment, stress, management style, balanced lifestyles, childcare provision, vocational education and training standards, worker participation, retirement policies

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Examine the wider implications and effects of European and global integration on organisations	<ul style="list-style-type: none"> • identify the effects of globalisation on national economies • discuss the influence of international institutions • summarise the role and responsibility of European Union membership on the workplace
2 Investigate the range and effects of environmental legislation, directives and guidance and the processes organisations need to adopt	<ul style="list-style-type: none"> • discuss the economics of adopting a policy of environmental awareness • summarise actions that need to be taken by organisations to maintain the environment • specify the measures that exist to improve workplace health and safety practice
3 Explore the socio-cultural, ethical and moral issues that affect organisations in the current economic environment to establish and implement good practice	<ul style="list-style-type: none"> • analyse the responsibilities of organisations to improving workforce welfare • review approaches to the management of diversity • compare organisational approaches to ensuring positive policies of workforce diversity

Guidance

Delivery

The social, ethical and value themes in this unit means that it cannot be taught as straightforward knowledge. Discussions with advocates of the various aspects may be the best mode of delivery. Group discussions and group work should be encouraged throughout.

The approach to assessment is that individual learners need to gain an awareness of the full range of corporate responsibilities as well as specialising in one particular aspect of it.

Assessment

As the subject matter in this unit is very wide, learners need to develop one general discussion and one specific subject assessment as follows:

- a report on a company that the learner knows well, evaluating its general approach to corporate social responsibility as a whole
- a presentation on a company that the learner knows well, evaluating its general approach to corporate social responsibility as a whole
- a group report and presentation on a company that the learner knows well, evaluating its general approach to corporate social responsibility as a whole
- a research report comparing different organisational approaches to one factor of corporate social responsibility
- a presentation comparing different organisational approaches to one factor of corporate social responsibility
- a group report and presentation comparing different organisational approaches to one or more factors of corporate social responsibility.

Links

The unit covers the whole area of organisational or business ethics and thus lies at the core of every other unit. It has particular links, however, to *Unit 15: Managing Virtual Organisations* and *Unit 9: Culture Climate Values*. It also has links to *Unit 3: Leadership* in the Level 4 BTEC Professional Qualifications in Management Studies.

Many links can be made to units within the National Occupational Standards in Management, in particular:

- Unit B8: Ensure compliance with legal, regulatory, ethical and social requirements
- Unit B11: Promote diversity in your area of responsibility
- Unit B12: Promote diversity in your organisation.

Resources

Access to local organisations is the resource most needed here with a case study library as back up. Local speakers can also prove beneficial. Access to books, journals, newspapers and websites is also essential.

Sufficient library resources need to be available to enable learners for this unit. Learners need to be encouraged to read the 'broadsheet' daily newspapers and weekly business magazines.

Support materials

Books

There is a wide range of books and other useful texts on the market and the list below is purely indicative. The list includes some standard texts that need to be used appropriately, as well as some other texts that include case studies. The year of first publication has been included but many have been reprinted and updated over the years and the use of latest editions is encouraged.

Af Malmborg M and Strath B (editors) — *The Meaning of Europe* (Berg, 2002)
ISBN: 1859735819

Andriof J and McIntosh M — *Perspectives on Corporate Citizenship* (Greenleaf Publishing, 2001) ISBN: 187471939X

Balanya B — *Europe Inc.* (Pluto Press, 2004) ISBN: 0745321631

Beck U — *The Brave New World of Work* (Polity Press, 2000) ISBN: 0745623980

Braithwaite J and Drahos P — *Global Business Regulation* (Cambridge University Press, 2000)
ISBN: 0521784999

Chryssides G and Kaler J — *Essentials of Business Ethics* (McGraw-Hill 1996)
ISBN: 007707856X

Cram L and Dinan D — *Developments in the European Union* (Palgrave Macmillan, 1999)
ISBN: 0333736338

Crane R — *European Business Culture* (FT Prentice Hall, 1999) ISBN: 0135745594

Friedman T — *The Lexus and the Olive Tree* (HarperCollins, 2000) ISBN: 0006551394

Galford R and Drapeau A — *The Trusted Leader: Bringing Out the Best in Your People and Your Company* (Simon & Schuster, 2003) ISBN: 0743235398

Griseri P — *Managing Values: Ethical Change in Organisations* (Palgrave Macmillan, 1998)
ISBN: 0333711076

Guirdham M — *Communicating Across Cultures* (Palgrave Macmillan, 1999)
ISBN: 0333754107

Hilton S and Gibbons G — *Good Business* (Thomson Learning, 2004) ISBN: 1587991616

Kandola R and Fullerton J — *Diversity in Action: Managing the Mosaic* (Institute of Personnel and Development, 1998) ISBN: 0852927428

Konopaske R and Ivancevich J — *Global Management and Organisational Behaviour* (McGraw-Hill, 2003) ISBN: 0071232516

McEwan T — *Managing Values and Beliefs in Organisations* (Prentice Hall, 2001)
ISBN: 0273643401

Nixon B — *Global Forces: A Guide for Enlightened Leaders on what Companies and Individuals Can Do* (Chalford Management Books, 2000) ISBN: 1852523530

Robbins P — *Greening the Corporation: Management Strategy and the Environmental Challenge* (Earthscan, 2001) ISBN: 1853837725

Rugman A — *The End of Globalization* (Random House, 2001) ISBN: 0712684956

Solomon J and Solomon A — *Corporate Governance and Accountability* (Wiley, 2004) ISBN: 0470843659

Weiss J — *Business Ethics: A Stakeholder and Issues Management Approach* (Thomson Learning, 2000) ISBN: 0030184584

Journals/magazines

Most general management journals contain relevant articles at least and these have been included in the list below along with more specialist journals

Academy of Management Journal (Academy of Management)

British Journal of Management (Blackwell)

Business Week (McGraw-Hill)

California Management Review (University of California, Berkeley)

European Journal of Industrial Relations (Sage Publications)

Equal Opportunities Review (Lexis Nexis UK)

European Management Journal (Elsevier)

Harvard Business Review (Harvard Business School)

IRS Employment Review (IRS Croydon)

Journal of General Management (The Braybrooke Press Ltd)

Journal of Management Studies (Blackwell)

Journal of World Business (Elsevier)

Management Services (Institute of Management Services)

Management Today (Chartered Institute of Management)

MIT Sloan Management Review (MIT Sloan School of Management)

Organisational Dynamics (Elsevier Science Inc)

People Management (Chartered Institute of Personnel and Development)

Websites

Appropriate websites will depend on the sector, market and organisation chosen. However, an indicative range of general websites is given below.

www.acas.org.uk	Advisory Conciliation and Arbitration Service
www.bbc.co.uk	British Broadcasting Corporation
www.bized.ac.uk	learning materials and case studies
www.business.com	business search engine on business background
www.cipd.uk	Chartered Institute of Personnel and Development
www.cre.gov.uk	Commission for Racial Equality

www.direct.gov.uk	public service information
www.drc.gov.uk	Disability Rights Commission
www.enterprisenetworks.co.uk	Enterprise Networks conference and exhibition
www.eoc.org.uk	Equal Opportunities Commission
www.findarticles.com	Looksmart — search for articles from more than 500 publishers
www.ft.com	Financial Times Archive
www.hse.gov.uk	Health and Safety Executive
www.icomesdata.co.uk	Incomes Data Services
www.i-l-m.com	Institute of Leadership and Management
www.managers.org.uk	Chartered Management Institute
www.mintel.co.uk	Mintel International on consumer markets
www.statistics.gov.uk	UK National Government Statistics

Unit 8: Leadership of Your Organisation

Learning hours: 30

NQF Level 7

Description of unit

This unit gives learners an insight into current thinking on leadership from the perspective of the organisation. In a rapidly changing working environment the emphasis is on the studies of the last ten years rather than traditional leadership models. Learners will consider the range of competences and styles of successful leaders, the importance of the context in which leadership exists and how organisations can plan to meet their current and future requirements for leadership.

Although the unit takes the perspective of the organisation, it provides insights that can contribute to the learners' development of their own leadership skills. The unit also offers the opportunity to develop analytical and long-term planning skills.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Examine a range of **current theories and models of leadership and their applicability to different sub-divisions, organisations, industries and sectors**
- 2 Investigate the **current and future requirements** of leadership within a sub-division, organisation, industry or sector
- 3 Make **proposals for the development of leadership** competences to meet current and predicted future requirements within a sub-division, organisation, industry or sector.

Content

1 **Current theories and models of leadership and their applicability to different sub-divisions, organisations, industries and sectors**

Theories, models and styles: universal theories such as Transformational Leadership, Transactional Leadership (Bennis, Bass), Charismatic Leadership (Conger and Kanungo, Shamir, House and Arthur, 1994), Level 7 Leadership (Collins, 2001)

Situational theories: eg Tri-dimensional Leadership Theory (Yukl, 2004)

Emotional intelligence (EQ): its influence on leadership effectiveness, drivers; constrainers and enablers (Higgs and Dulewicz); studies on the overall competences of leaders such as Dulewicz and Higgs; Emotional Intelligence (EQ) Cognitive (IQ) and Managerial (MQ) Competencies

Applicability to different sub-divisions, organisations, sectors and industries: varying importance of factors (eg Zajac, Kraatz and Bresser, 1999) such as efficiency, reliability, innovation, adaptation and human resources in sectors, organisations and sub-units, size and stage of development of organisation eg business start-up versus established business, turnaround leadership, public or private sector, cultural issues

2 **Current and future requirements**

Current and future requirements of leadership: generic challenges eg information age, virtual organisations, diversity, new careers — generation X, new psychological contracts, the effects of market globalisation, the importance of shared organisational learning, mergers and acquisitions, privatisation of public sector organisations, increased accountability and regulation, scenario building to identify specific future challenges for organisations. Work of Council for Excellence in Management and Leadership (CEML): Best Practice Guide for Organisations

3 **Proposals for the development of leadership**

Proposals for development of leadership: different methods of developing leaders: training courses, coaching, mentoring, companies' own universities, action learning, partnerships with key academics, changing methodology in leadership development programmes, developing leaders versus recruiting as needed; model for assessing future leadership requirements such as CEML Best Practice Guide for Organisations and accompanying toolkit

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Examine a range of current theories and models of leadership and their applicability to different sub-divisions, organisations, industries and sectors	<ul style="list-style-type: none"> • evaluate a range of leadership theories and models that reflect current thinking • explain the expected impact of a range of leadership styles on specific sub-divisions, organisations, industries, sectors or industries
2 Investigate the current and future requirements of leadership within a sub-division, organisation, industry or sector	<ul style="list-style-type: none"> • assess current requirements • develop an internally consistent and plausible scenario of likely future requirements of leadership for an organisation, industry or sector
3 Make proposals for the development of leadership competences to meet current and predicted future requirements within a sub-division, organisation, industry or sector	<ul style="list-style-type: none"> • make proposals that are designed to meet the specific requirements of an organisation, industry or sector • critically evaluate the use of a full range of methods of leadership development within the specified context • select and justify choices made

Guidance

Delivery

With so much literature available on leadership there is a need to select influential theories and models which are representative of current thinking. The content is intended to be illustrative of the thinking at the time of writing and as ideas evolve some changes may be appropriate.

When delivering to a homogeneous cohort, the models most appropriate to the employment situation of the learners can be emphasised.

Learners should be given ample opportunity to explore theory and develop analytical skills through the use of case studies, discussion and group exercises. The development of future scenarios provides a particularly rich opportunity for working in small groups.

Models of delivery should allow time for reflection and development of understanding over a period of time.

As a Level 7 vocational unit, the emphasis should be on the practical application at strategic level.

Assessment

A vital aspect of assessment is that learners apply theory to specific situations and produce practical proposals.

Assessment could be through a series of activities or through one larger project. The subject could be a range of organisations, an organisation selected for the purpose or the learner's own organisation.

Assessment vehicles could include written management reports, oral presentations and questioning.

Links

This unit links with *Unit 1: Advanced Professional Development*, *Unit 2: Managing Change in Organisations*, *Unit 4: Strategic Planning and Implementation*, *Unit 6: Human Resources Planning and Development*, *Unit 7: Management in the Wider Environment* and *Unit 9: Culture Climate Values*.

The unit also provides underpinning knowledge and skills for the following units within the National Occupational Standards in Management:

- Unit B2: Map the environment in which your organisation operates
- Unit B3: Develop a strategic business plan for your organisation
- Unit B7: Provide leadership for your organisation
- Unit B9: Develop the culture of your organisation.

Resources

The European Foundation for Quality Management (EFQM) Excellence model includes leadership as a major enabler of organisational results. It includes questionnaires suitable for small and medium enterprises (SMEs) and large organisations in the private and public sector. See www.efqm.org for details.

Cambridge Strategy Publications offers scoreable company self-audits on:

- The Business Innovation Audit
- The Organisational Leadership Audit
- The Organisation Shadow-Side Audit.

Cambridge Strategy Publications
39 Cambridge Place
Cambridge CB2 1NS

Telephone: 01223 355 855

Website: www.cambridgestrategy.com

TV Choice offers a range of reasonably priced videos on various topics, including managerial styles, available from:

TV Choice
PO Box 597
Bromley
Kent BR2 0YB

Telephone: 020 8464 7402

Fax: 020 8464 7845

Email: tvchoiceuk@aol.com

Support materials

Books

Boyett J — *The Guru Guide: the Best Ideas of the Top Management Thinkers* (Wiley, 2000)
ISBN: 0471380547

Brooks I — *Organisational Behaviour: Individuals, Groups and Organisation* (Prentice Hall, 2002) ISBN: 0273657984

Burke R and Cooper C — *Leading in Turbulent Times* (Blackwell, 2003) ISBN: 140511522X

Collins J — *Good to Great* (Random House Business Books, 2001) ISBN: 0712676090

Katzenbach J — *Teams at the Top* (Harvard Business School Press, 1998) ISBN: 0875847897

Nahavandi A — *The Art and Science of Leadership* (Prentice Hall, 2002) ISBN: 0130458120

Peters T — *Re-imagine!* (Dorling Kindersley, 2003) ISBN: 1405300493

Rollinson D — *Organisational Behaviour and Analysis* (Prentice Hall, 2003)
ISBN: 0582820766

Sadler P — *Leadership* (Kogan Page, 2003) ISBN: 074943919X

Tompkins J — *The Genesis Enterprise* (McGraw-Hill, 1995) ISBN: 0070651035

Ulrich D et al — *Results-based Leadership* (Harvard Business School Press, 1999)
ISBN: 0875848710

Journals/magazines

Academy of Management Executive (Academy of Management)

Chartered Management Institute reports, *Leadership, the challenge for all?* (2001)

Leading change in the public sector: making the difference (May 2003)

Harvard Business Review (Harvard)

International Journal of Project Management (Europrojex)

International Journal of Training and Development (Blackwell)

Management Today (Chartered Institute of Management)

Organizational Dynamics (Elsevier Science Inc)

People Management (Chartered Institute of Personnel and Development)

Professional Manager (Institute of Management)

Websites

www.aboveclouds.org	free downloadable articles on trends in working life and ask for your opinions on the trends in return
www.ase-solutions.co.uk	consultancy offering free articles and an electronic newsletter on leadership and HR issues
www.ccl.org	non-profit making educational institution offering research findings in areas of creative leadership
www.hbsp.harvard.edu	extracts from Harvard Business Review articles
www.managers.org.uk	the Chartered Management Institute — has searchable database which members can use to access journal articles and other publications

Unit 9: Culture Climate Values

Learning hours: 30

NQF Level 7

Description of unit

This unit focuses on the crucial importance of understanding culture and climate in a globalised, diverse and repeatedly restructured working environment. The unit explores cultural issues at national and organisational levels and the differences between culture, climate and values. The unit also explores how a manager can interact effectively in different cultural settings and influence the development of a desired organisational culture.

Learners will explore the work that has been done to develop an understanding of both national and organisational cultural dimensions and consider how this affects their interaction with stakeholders from different cultural groups.

Learners will investigate studies on the development of organisational values and the climate in the workplace and the extent to which these can be influenced by managers.

Although the unit is underpinned by exploration of relevant theory, the intention is that learners apply their learning to specific organisations and situations. They will develop realistic strategies for interacting effectively with people from different cultures and for contributing to the development of organisational culture.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Examine different **national and organisational cultures** and how they affect **the achievement of organisational objectives**
- 2 Develop strategies for **communicating effectively with stakeholders** belonging to different cultural groups
- 3 Explore the development of desired **organisational values** and an effective work climate in an organisation.

Content

1 National and organisational cultures and the achievement of organisational objectives

Culture: culture as shared values, practices and customs, definitions of organisational and national cultures, culture at ascending levels, sub-cultures, professional cultures, organisational culture, industry culture, national and supra-national culture; models of culture eg Trompenaars' Implicit-Explicit factors, Schein's three levels

National cultures: methods of classifying national culture eg the work of Laurent, Hofstede and Trompenaars

Organisational culture: models of organisational culture, eg Handy's power, role, person and task cultures, Johnson and Scholes cultural web, Organisational Change Programmes — activities, effectiveness, successful and unsuccessful cases

Impact on achievement of organisational objectives: areas of differences and potential misunderstandings — communications, management, negotiation, buyer behaviour, misinterpreting conflicting cultural signals (eg work of Trompenaars and Hampden-Turner 1998), cultural shock, case studies illustrating importance of developing cohesive culture in merged organisations

2 Communicating effectively with stakeholders

Communicating effectively: strategies, developing self-awareness of own and organisational culture, benefits of diverse workforce, acculturation programmes, intercultural communication skills

Stakeholders: customers, consumers, employees, shareholders, governments, communities, business partnerships and alliances — the increasing need to co-operate with people from different cultural groupings (including beliefs, values, customs and language)

3 Organisational values

Values: values or core values as a part of organisational culture, crisis of ethics in business and the new emphasis on value leadership — framework for developing and supporting strong corporate core values

Climate: how climate is defined, difference between climate and culture, key aspects of organisational climate eg flexibility, responsibility, standards, rewards, clarity, team commitment, impact of management practices on climate, impact of climate on efficiency and effectiveness, methods of improving climate

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Examine different national and organisational cultures and how they affect the achievement of organisational objectives	<ul style="list-style-type: none"> • build a coherent and soundly-based cultural profile of one other national cultural group with which an organisation needs to co-operate • compare the cultural differences between two organisations or parts of an organisation, within one national culture • produce a justified judgement on the probable impact of the success or failure of inter-cultural co-operation on a project or part of an organisation
2 Develop strategies for communicating effectively with stakeholders belonging to different cultural groups	<ul style="list-style-type: none"> • develop realistic and comprehensive strategies of communication, which address cultural differences of stakeholders including differences in beliefs, values, customs and language
3 Explore the development of desired organisational values and an effective work climate in an organisation	<ul style="list-style-type: none"> • objectively evaluate existing climate • develop proposals that take into account the specific strategic and operational needs of the organisation

Guidance

Delivery

It is recommended that a range of strategies be used to deliver this unit in order to facilitate the assimilation of theory, its application to practical situations and the development of awareness of the learners' own cultures. As this is a Level 7 management unit, learners should be encouraged to actively consider how the insights gained can be applied within an organisational context at a strategic level.

Discussion, debate, individual workplace comparisons and use of case studies are all elements of this unit. Where groups of learners are from one organisation or sector, consideration of cultural issues can be based upon the needs of the organisation or sector.

Video footage, not necessarily relating to business or management, or acting could be used to illustrate some aspects of culture.

The use of investigative tools is recommended to encourage both self-awareness and the practical application of the insights gained.

Assessment

A key feature of the assessment strategy for this unit is the practical application of the theoretical content to an organisational situation at strategic level. Learners who have the support of their organisations could develop individual assessment plans using opportunities identified from their workplace.

Where this unit is delivered as part of a larger programme, the assessment could be fully or partly integrated into the assessment strategy for other units such as *Unit 1: Advanced Professional Development*, *Unit 2: Managing Change*, *Unit 3: Management Research Project and Presentation*, *Unit 10: Management Research Methods* and *Unit 17: Strategic Marketing Management*.

The evidence for this unit could be presented in a range of business formats including management reports, project plans, business case proposals and presentations.

Links

This unit links to *Unit 2: Managing Change in Organisations*, *Unit 7: Management in the Wider Environment*, *Unit 6: Human Resources Planning and Development*, *Unit 8: Leadership of Your Organisation*, *Unit 13: The Creative Manager*, *Unit 17: Strategic Marketing Management* and *Unit 18: Developing a Communication Strategy*.

The unit also has links with many of the units within the National Occupational Standards for Management, in particular:

- Unit B9: Develop the culture of your organisation
- Unit B12: Promote diversity in your organisation
- Unit C4: Lead change
- Unit C6: Implement change
- Unit D2: Develop productive working relationships with colleagues and stakeholders
- Unit D4: Plan the workforce.

Support materials

Books

- Brooks I — *Organisational Behaviour: Individuals, Groups and Organisations* (Prentice Hall, 2002) ISBN: 0273657984
- Brown A — *Organisational Culture* (FT Prentice Hall, 1998) ISBN: 0273631470
- Chaney L and Martin J — *Intercultural Business Communication, Third Edition* (Prentice Hall, 2003) ISBN: 0131419307
- Gatley S et al — *Comparative Management: a Transcultural Odyssey* (McGraw-Hill, 1996) ISBN: 0077091841
- Goffee R and Jones G — *The Character of a Corporation* (Profile Business, 2003) ISBN: 1861976399
- Handy C — *Understanding Organizations* (Penguin, 1997) ISBN: 0140268413
- Handy C — *Gods of Management* (Arrow Books 1995) ISBN: 0099548410
- Hofstede G — *Culture and Organizations: Software of the Mind* (McGraw-Hill, 2004) ISBN: 0071439595
- Hofstede G — *Culture's Consequences, Second Edition* (Sage, 2001) ISBN: 0803973233
- Scott-Morgan P — *The Unwritten Rules of the Game* (McGraw-Hill, 1994) ISBN: 0070570752
- Rollinson D — *Organisational Behaviour and Analysis* (Prentice Hall, 2003) ISBN: 0582820766
- Rousseau D et al — *Psychological Contracts in Employment: Cross-national Perspectives* (Sage, 2000) ISBN: 0761916814
- Schein E — *Organisational Culture and Leadership, Third Edition* (Pfeiffer Wiley, 2004) ISBN: 0787968455

Journals/magazines

Academy of Management Executive (Oxford University Press)

Business Strategy Review (Blackwell)

Harvard Business Review (Harvard)

International Journal of Project Management (Europrojex)

Journal of World Business (Pergamon Press)

Management Today (Chartered Institute of Management)

People Management (Chartered Institute of Personnel and Development)

Copies of articles from the above journals can be obtained from the Chartered Management Institute via its searchable database.

Other publications

The Hofstede questionnaire on national cultures is available from The Institute for Research on Intercultural Cooperation:

Tilburg University
PO Box 90153
5000 LE Tilburg
The Netherlands

Telephone: +31 13 466 2816
Fax: +31 13 466 8018
Website: www.uvt.nl/iric
Email: IRIC@uvt.nl

Hay Resources Direct offers two questionnaires on managerial style and organisational climate. The package includes trainer's handbook available from:

Hay Resources Direct
52 Grosvenor Direct
London SW1W 0AU

Email: sales_europe@haygroup.com

Cambridge Strategy Publications offers scoreable company self-audits on:

The Business Innovation Audit
The Organisational Leadership Audit
The Organisation Shadow-Side Audit
Cambridge Strategy Publications

The self-audits are available from:

39 Cambridge Place
Cambridge CB2 1NS

Website: www.cambridgestrategy.com
Telephone: 01223 355 855

TV Choice offers a range of reasonably priced videos on various topics, including managerial styles and teamworking. Please contact:

TV Choice Ltd
PO Box 597
Bromley
Kent BR2 0YB

Telephone: 020 8464 7402
Fax: 020 8464 7845
Email: tvchoiceuk@aol.com

Websites

www.ccl.org	non-profit making educational institution offering research findings in areas of creative leadership
www.haygroup.co.uk	the Hay Group is a consultancy group whose website has information on assessing climate in work groups
www.hbsp.harvard.edu	extracts from Harvard Business Review articles
www.managers.org.uk	the Chartered Management Institute has searchable database which members can use to access journal articles and other publications
www.nationmaster.com	site developed by Rapid and contains a wealth of international statistics
www.uvt.nl/iric	the Institute for Research on Intercultural Cooperation

Unit 10: Management Research Methods

Learning hours: 30

NQF Level 7

Description of unit

This unit is designed to introduce learners to the techniques and methods required when carrying out formal research. The unit addresses a variety of research methodologies and offers the opportunity to carry out interventionist or action research.

Learners will be required to produce a project proposal based on independent research into an area of professional business practice that interests them and will add to their professional development. Where appropriate learners can link the outcomes of this unit with those from units that deal with project implementation.

The study should use both primary and secondary sources of information, and should focus on an issue appropriate to the learners' programme of study. The study undertaken should build on the knowledge, skills and understanding achieved in other units. Tutor approval should be sought before commencing study and the final learner-produced report should be produced to a given format.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Identify a **research proposal**
- 2 Carry out the **research** into a specified area of management
- 3 **Present and evaluate** the findings with regard to the initial proposal.

Content

1 **Research proposal**

Research methodologies: intervention, non-intervention, action research

Hypothesis: definition, suitability, skills and knowledge to be gained, aims, objectives, terms of reference, duration, ethical issues

Action plan: rationale for research question or hypothesis, task dates, review dates, monitoring/reviewing process, strategy

Preparation: identifying ideas/topics/areas of investigation, research question(s), scope and feasibility, hypothesis, literature search, agreeing the process, targets, milestones, action plan, timetable and procedure, monitoring and revision

Methodology: literature search, eg library, internet, sector data sources; pure and applied research, developmental, longitudinal, survey, case study, research and development, concepts and theories, terminology, validity and reliability

2 **Research**

Primary: questionnaires — type, layout, distribution, original research data gathered by the learner; interviews, selecting interviewees, bias, verification of data, time, place, style; interviews — preparation, format, style, recording

Secondary: eg books, journals, library search, use of IT, internet, media

Qualitative data analysis: interpreting transcripts and records, coding techniques, categorisation, relationships, trends, processes, use of computers; presentation of data and information

Quantitative data analysis: coding/values, manual/electronic methods, specialist software; presentation of data, eg bar/pie charts, graphs, statistical tables; comparison of variables, trends, forecasting

3 **Present and evaluate**

Presentation: eg formal written format, by viva voce or oral presentation, diagrammatic or graphical figures

Methodology: presentation, eg IT, audio, visual aids, time, pace; delivery critique of the methods used in the study, recommendations, eg using the findings, recommendations for the future, areas for future research

Evaluation: planning, objectives, focus, benefits, difficulties

Criteria: purpose, editing, format, sequencing success, critical analysis, discussion of evidence and findings

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Identify a research proposal	<ul style="list-style-type: none"> • identify a research question or hypothesis and justify choice • justify the chosen methodology in terms of the research question • prepare an action plan with target dates and methods for monitoring and updating
2 Carry out the research into a specified area of management	<ul style="list-style-type: none"> • collect and review data using appropriate methods, including primary and secondary research techniques • analyse and interpret appropriate qualitative and quantitative data
3 Present and evaluate the findings with regard to the initial proposal	<ul style="list-style-type: none"> • record findings in an accepted format • present and summarise the findings using suitable methods • evaluate the methodology used and critically analyse the findings • propose recommendations based on the findings which identify and justify areas for future research

Guidance

Delivery

Learners may have developed a range of investigative skills throughout the programme of study, but this unit focuses on formal research methods leading to the production of a ‘thesis style’ report. It is important that learners understand the elements that make up formal research, including the different methodologies, the proposal, action planning, carrying out the research itself and recording and presenting their findings. Tutors will need to cover the theory underpinning formal research to enable learners to complete this unit satisfactorily.

The research proposal itself is dependent on the learner, the context of their area of learning, their focus of interest and the anticipated outcomes. The unit should draw together a range of other content areas from the programme of study to form a holistic piece of work that makes a positive contribution to commercial practice. As *Unit 3: Management Research — Project and Presentation* requires delivery of a major project, the research proposal could underpin the practical outcomes required by that unit. To meet the outcomes learners will need to establish relationships with commercial and industrial organisations in order to collect data that will lead them to their conclusions. It is essential for the tutor to monitor the development of individual research proposals closely to ensure learners are following the correct guidelines and working towards agreed objectives.

Learners will need further guidance to support the presentation and evaluation of their work. The presentation of their research should follow formal presentation practice, with correct referencing and bibliography details. Tutors should deliver an appropriate session to underpin this approach, but the teaching of presentation skills should not be the focus of this area of work.

Assessment

Evidence for this unit should be generated through a written assignment or report, demonstrating a sound understanding of research methods and protocol. The report should show evidence of both primary and secondary research. It should look at the present day and the current culture and operation of the service, giving a view on the issues that affect it. There should also be an appreciation of historical events that have the greatest impact on current structure and operations. Crucially, the research needs to be focused on meeting its objectives and the outcomes need to be credible. Learners will need to demonstrate the ability to work independently, and to provide evidence of an individual approach in their finished work. Learners will require close supervision and organised tutor support in order to design a study which is realistic, achievable and economically viable within the scope of the unit. Tutor approval should be sought before beginning the study.

Links

The unit, by being integrative, provides opportunities for learners to demonstrate knowledge and understanding developed from across all the other units. The unit follows on from *Unit 10: Management Research Methods* and *Unit 7: Managing Projects* from the Level 4 BTEC Advanced Professional Award/Certificate/Diploma in Management Studies. It is closely related to *Unit 2: Managing Change in Organisations* in terms of product, service or process introduction rather than operational or organisational development and change. It has links with *Unit 4: Strategic Planning and Implementation* which is more concerned with overall organisational direction and to *Unit 13: The Creative Manager* that looks at innovation of management approach and style.

The unit also has links with many units of the National Occupational Standards in Management, in particular:

- Unit C5: Plan change
- Unit E4: Promote the use of technology within your organisation
- Unit F2: Manage a programme of complementary projects
- Unit F10: Develop a customer-focused organisation
- Unit F12: Improve organisational performance.

Resources

Tutors will need to establish the availability of resources to support independent study before allowing learners to proceed with their proposals.

Where learners are engaged in primary research, the tutor must check that access has been negotiated and that ethical research procedures are being followed. Learners will need access to ICT and to appropriate commercial organisations.

Learners will need access to ICT when analysing their findings and writing up their reports.

Support materials

Books

Bell J — *Doing your Research Project, Third Edition* (Open University Press, 1999)
ISBN: 0335203884

Best J — *Research in Education* (Prentice Hall, 1997) ISBN: 0137740182

Cohen L and Manion L — *Research Methods in Education* (RoutledgeFalmer, 2000)
ISBN: 0414195411

Coolican H — *Introduction to Research Methods and Statistics in Psychology*
(Hodder & Stoughton, 1996) ISBN: 0340679379

Elliott J — *Action Research for Educational Change* (Open University Press, 1991)
ISBN: 0335096891

Gill J and Johnson P — *Research Methods for Managers, Second Edition* (Sage Publications, 2002) ISBN: 0761940022

Hoinville G and Jowell R — *Survey Research Practice* (Avebury, 1985) ISBN: 0566051567

Kane E — *Doing Your Own Research* (Marion Boyars, 1997) ISBN: 0714530433

Lock D — *Project Management* (Gower Publications, 2003) ISBN: 0566085518

Marshall L — *A Guide to Learning Independently, Second Edition* (FT Prentice Hall, 2001)
ISBN: 0582811708

McNiff J — *Action Research: Principles and Practice* (RoutledgeFalmer, 2001)
ISBN: 0415219949

Robson C — *Real World Research* (Blackwell Publications, 2002) ISBN: 0631213058

Saunders M, Lewis P and Thornhill A — *Research Methods for Business Students*
(FT Prentice Hall, 2002) ISBN: 0273658042

Unit 11: Strategic Review

Learning hours: 30

NQF Level 7

Description of unit

This unit together with *Unit 4: Strategic Planning and Implementation* helps learners to recognise the importance of effective forecasting and planning in the current global economy. Organisations need to be proactive with their direction determined by logical analysis. It is not always possible to calculate future events but without any sense of progression it is easy to lose competitiveness, market position and customer loyalty.

For this unit, learners will be required to undertake a strategic review and calculate where an organisation is now in relation to other organisations in its market. Learners will also look at what factors need to be taken into account in order to suggest fairly clearly the possible ways to progress.

Strategic management is divided between *Unit 4: Strategic Planning and Implementation* and *Unit 11: Strategic Review*. This recognises the amount of work that is required for successful strategic planning. Learners can take either unit without the other but may find it more fulfilling to start with *Unit 4* before tackling this unit.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Examine existing **short- and long-term environmental factors** affecting an organisation or sector
- 2 Review the effectiveness of **existing business strategies, policies and plans**
- 3 Develop and consider **options for strategic planning**.

Content

1 Short- and long-term environmental factors

Environmental factors: the needs and expectations of customer groups, shareholders, suppliers and sub-contractors, the workforce and the community as a whole, review the success and direction of competitors and the market sector as a whole, effects of potential changes likely to happen in the longer term — in politics and legislation, in technology, in product design, in trends and expectations, use of external surveys and statistics, use of appropriate tools, SWOT analysis, STEEP analysis, market research, primary and secondary information, customer complaints and feedback, feasibility

2 Existing business strategies, policies and plans

Business strategies: use of appropriate tools — value chain analysis, Porter's five forces, Boston growth-share matrix etc, internal surveys and statistics, product life, strategic drift, market share, measures for monitoring and evaluating, unrealised and emergent strategy, life cycle analysis, effects of globalisation, sustainable competitive advantage, pricing strategies, resources analysis, economies of scale and scope, core skills and competences, organisational culture analysis, market equilibrium, experience curves, comparative analysis

3 Options for strategic planning

Strategic planning: Ansoff strategies, vertical, backwards and forwards integration, horizontal integration, differentiation, cost leadership, Mintzberg's strategies emergent, leadership and differentiation, strategic alliance, merger, acquisition, competitive strategies, value-based strategy, contingency strategy, market niche, market segmentation, adding value, market share, workforce competence development, product portfolio, reconfiguration, gap analysis, vertical integration, profitability, niche markets, present portfolio analysis, benchmarking

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Examine existing short- and long-term environmental factors affecting an organisation or sector	<ul style="list-style-type: none"> • identify the importance of environmental factors affecting the organisation or sector • analyse the needs and expectations of all stakeholders involved • conclude the major changes taking place in the environment that will affect strategy
2 Review the effectiveness of existing business strategies, policies and plans	<ul style="list-style-type: none"> • develop and use appropriate tools and measures to analyse the effects of current business plans • summarise the position of the organisation in its current market • evaluate the competitive strengths and weaknesses of the organisation's current strategies
3 Develop and consider options for strategic planning	<ul style="list-style-type: none"> • use a range of tools and models to develop strategic options • develop a comparative understanding of activity from organisations in the market • create a range of feasible options as the basis of future organisational strategy

Guidance

Delivery

Throughout this unit it is essential that learners apply their learning and understanding of the methods of strategic review to a real organisation that they know or with which they are familiar. The objective is not just to learn and understand the range of tools and concepts used in strategic analysis but also to be able to use them to develop a valuable and insightful report.

While some input sessions and discussion are needed to help learners familiarise themselves with the theoretical tools and concepts, they need to be encouraged to research and compare findings in groups. Throughout, the emphasis will be on using recognised models and analytical tools to develop an understanding of the environmental factors affecting the organisation and its current performance in its existing sector or market.

From these analyses, learners should use rational techniques to suggest and propose strategic options for the organisation or sector to consider in any revision of its strategy or business planning. The unit could be delivered jointly with *Unit 4: Strategic Planning and Implementation* with planning for implementation following the review undertaken here. Learners could work in pairs or even in small teams for this unit but this will require the selection of an organisation with appropriate width and depth of interest and activity as well as potential for development.

Assessment

For this unit the learner has to develop a report based on an analysis of the environment, the current performance of the organisation (or a number of organisations in a market) and suggest some rational options, as the basis of future strategic plans. The report could then be presented to an audience.

Should learners opt to work in pairs or teams, they need to provide evidence of reflection of their learning and undertake a joint presentation at the end.

Links

The natural link here is to *Unit 4: Strategic Planning and Implementation*, but in reality there are links to all other Level 7 Management units as the unit needs to incorporate, to a greater or lesser degree, some consideration from all areas and functions of organisational management. However, *Unit 7: Management in the Wider Environment*, *Unit 15: Managing Virtual Organisations*, *Unit 17: Strategic Marketing Management* and *Unit 18: Developing a Communication Strategy* are all closely allied.

This unit also has links with the National Occupational Standards in Management, in particular:

- Unit B3: Develop a strategic business plan for your organisation
- Unit B4: Put the strategic business plan into action.

Resources

Case studies, as well as a good range of texts and journals need to be available. Video material can also be of value. Sufficient library facilities need to be available to enable learners to achieve this unit. In addition, learners need to be prepared to read the 'broadsheet' press and weekly business magazines on a regular basis.

Support materials

There is a growing range of books and other useful texts on the market and the list below is indicative. It includes some standard texts that need to be used appropriately as well as other texts that include case studies. The year of first publication has been included in some cases but the use of later editions where these are available is recommended.

Asch D and Bowman C — *Readings in Strategic Management* (Palgrave Macmillan, 1989)
ISBN: 0333518098

Caplan R and Norton D — *The Strategy-focused Organization* (Harvard Business School Press, 2000) ISBN: 1578512506

Cusumano M and Markides C — *Strategic Thinking for the Next Economy* (Jossey Bass, 2001)
ISBN: 0787957291

Grant R — *Contemporary Strategy Analysis* (Blackwell, 2004) ISBN: 1405119993

Gratton L — *Living Strategy: Putting People at the Heart of Corporate Purpose* (Prentice Hall, 2000) ISBN: 0273650157

Johnson G and Scholes K — *Exploring Corporate Strategy* (Prentice Hall, 2003)
ISBN: 0582844495

Johnson G and Scholes K — *Exploring Public Sector Strategy* (Prentice Hall, 2000)
ISBN: 0273646877

Lynch R — *Corporate Strategy* (Prentice Hall, 2002) ISBN: 0273658549

Mintzberg H — *The Rise and Fall of Strategic Planning* (Prentice Hall, 2000)
ISBN: 0273650378

Mintzberg H, Ahlstrand B and Lampel J — *Strategy Safari: A Guided Tour through the Wilds of Strategic Management* (Prentice Hall, 2001) ISBN: 0273656368

Stacey R — *Strategic Management and Organisational Dynamics* (Prentice Hall, 2002)
ISBN: 0273658980

Journals/magazines

Most general management journals will contain some relevant articles and these have been listed along with specialist journals

Academy of Management Journal (Academy of Management)

British Journal of Management (Blackwell)

California Management Review (University of California, Berkeley)

European Management Journal (Elsevier)

Harvard Business Review (Harvard Business School)

Journal of Business Strategy (Blackwell)

Journal of Management Studies (Blackwell)

Long Range Planning (Elsevier)

Management Today (Chartered Institute of Management)

MIT Sloan Management Review (MIT Sloan School of Management)

Strategic Change (Wiley Publishers)

Strategy and Leadership (Emerald)

Websites

Availability of appropriate websites will depend on the sector, market and organisation chosen. However, an indicative range of general websites is given below.

www.bbc.co.uk	British Broadcasting Corporation
www.bized.ac.uk	learning materials and case studies
www.business.com	business search engine on business background
www.cipd.uk	Chartered Institute of Personnel and Development
www.direct.gov.uk	public service information
www.enterprisenetworks.co.uk	Enterprise Networks conference and exhibition
www.findarticles.com	Looksmart search for more than 500 publications
www.ft.com	Financial Times archive
www.i-l-m.com	Institute of Leadership and Management
www.managers.org.uk	Chartered Institute of Management
www.mintel.co.uk	Mintel International on consumer markets
www.sps.org.uk	Strategic Planning Society
www.statistics.gov.uk	UK National Government Statistics

Unit 12: Supply Chain Management

Learning hours: 30

NQF Level 7

Description of unit

The aim of this unit is to provide an understanding of the strategies, systems, policies, procedures and techniques involved with managing the supply chain. The unit will help learners to understand the evolution of supply chain management and the strategies organisations develop to maintain effective supplier relationships. The unit gives learners the opportunity to evaluate its increasing contribution to business objectives. The unit also considers how e-supply chain business solutions help to integrate the supply chain for competitive advantage.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Explain the **evolution of supply chain management** and its growing contribution to business objectives
- 2 Explore **strategies used** by organisations **to develop and maintain effective supplier relationships**
- 3 Investigate **how web-based applications contribute to the full integration of the supply chain**
- 4 Investigate the effectiveness of **systems, policies and processes** for web-based transactions.

Content

1 Evolution of supply chain management (SCM)

Development: physical distribution management, materials management, logistics management and SCM (upstream and downstream)

Concepts: demand and supply management, push and pull models, enterprise resource planning (ERP), vendor managed inventory (VMI), efficient consumer response (ECR), value chains, lean supply, global SCM, contribution to business objectives

2 Strategies used to develop and maintain effective supplier relationships

Different types of relationship: eg adversarial, developmental, collaborative and strategic alliances, supplier development, e-tailing, business to business, business to consumer, intermediation and disintermediation

Networks: supplier associations, supplier tiering, organisational networks, personal networks, auctions

3 How web-based applications contribute to the full integration of the supply chain

Individual elements: the use of intranets and extranets in building value chains for organisations linked in the supply chain, order processing, web-based EDI, tracking systems

4 Systems, policies and processes

Differing applications for cost reductions and customer service: time compression, demand fulfilment, total cost of ownership reduction

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Explain the evolution of supply chain management and its growing contribution to business objectives	<ul style="list-style-type: none"> • describe and analyse the stages in the evolution of supply chain management • evaluate supply chain strategies and assess the contribution they make to the achievement of key business objectives
2 Explore strategies used by organisations to develop and maintain effective supplier relationships	<ul style="list-style-type: none"> • determine suitable strategies with regard to the development of relationships with suppliers, using appropriate web-based technologies • evaluate the effectiveness of strategies used by an organisation • devise effective systems for relationship maintenance
3 Investigate how web-based applications contribute to the full integration of the supply chain	<ul style="list-style-type: none"> • evaluate how web-based technologies may assist integration of different parts of the supply chain/network • demonstrate how web-based technologies have contributed to the effective management of the supply chain in an organisation and evaluate its effectiveness in this
4 Investigate the effectiveness of systems, policies and processes for web-based transactions	<ul style="list-style-type: none"> • evaluate the policies, strategies and systems used by an organisation for web-based transactions

Guidance

Delivery

Delivery will normally be a mixture of lectures and seminars. Learners will be required to work on case studies and they should be able to undertake research and investigation within their own workplace. It should be supplemented by visits to organisations, wherever possible, so that learners consider a range of policies, strategies and processes. The unit should be delivered as practically as possible as it provides numerous opportunities for experiential learning.

Visiting speakers from external organisations who can provide current examples of e-procurement (eg online businesses) is one recommended so that students learn about approaches adopted by different types of organisations including those involved in global sourcing.

Assessment

Evidence may be in the form of assignments, examinations and/or case studies. Assignments may be based around investigations into actual online business organisations or case study material. As part of the assessment process, learners should produce a work-related or work-based report focused on supply chain management in their own organisation.

Where workplace case studies are used for assessment purposes, learners should give a clear explanation of relevant situations and the importance of the policies and strategies of their organisation to the situation.

Links

This unit has links with units within the National Occupational Standards in Management, in particular:

- Unit B1: Develop and implement operational plans for your area of responsibility
- Unit B2: Map the environment in which your organisation operates
- Unit F4: Develop and review a framework for marketing
- Unit F9: Build your organisation's understanding of its market and customers
- Unit F10: Develop a customer-focused organisation.

Resources

Sufficient library resources should be available to enable learners to achieve this unit.

Support materials

Books

Chaffey D — *E-business and E-commerce* (FT Prentice Hall, 2003) ISBN: 0273683780

Harvard Business Review on Managing the Value Chain (Harvard Business School Press, 2000) ISBN: 1578512344

Martin C — *Logistics and Supply Chain Management* (FT Prentice Hall, 1998)
ISBN: 0273630490

Turban E et al — *Electronic Commerce: a Managerial Perspective* (Prentice Hall, 2003)
ISBN: 0131230158

Journals/magazines

European Journal of Purchasing and Supply (Elsevier Science)

Supply Chain Management (Emerald Group Publishing)

The Journal of Supply Chain Management (Institute for Supply Management)

Websites

Website content in this area is constantly changing. Tutors therefore need to investigate website availability and content. The following are examples currently worthy of investigation.

www.cips.org	Chartered Institute of Purchasing and Supply
www.emeraldinsight.com/scm	<i>Supply Chain Management</i> journal
www.iwvaluechain.com	<i>Industry Week's</i> 'The Value Chain'
www.jiscmail.ac.uk/lists/supply-management	academics and professionals in the area of supply chain management
www.logistics.about.com/mbody	news about logistics and supply chain

Unit 13: The Creative Manager

Learning hours: 30

NQF Level 7

Description of unit

This unit is concerned with creativity and innovation. Innovative people generally challenge the status quo and seek a variety of options, displaying a curiosity to learn and try out new things and generating and recognising imaginative solutions. Innovators take calculated and managed risks, having learnt from experience and reflected on experiences, using them to inform future actions. They set demanding but achievable objectives and respond positively and creatively to setbacks. Importantly, they anticipate likely scenarios based upon realistic analysis of trends and developments and they seek out and act on new opportunities. Innovators are imaginative and are creative.

The unit seeks to provide learners with the knowledge and skills to be effective innovators.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Challenge **current ways of working and current services and products**
- 2 Generate and recognise **creative and innovative solutions**
- 3 Articulate **cases for innovation** and persuade and influence others
- 4 Overcome **obstacles and barriers to innovation** to ensure effective innovative change is achieved.

Content

1 **Current ways of working and current services and products**

Methods of unlocking own creativity and the creativity of others: current and emerging political, economic, social, technological, environmental and legal developments; the importance of customer expectations and perceptions and how to monitor and visualise future trends; the importance of competitors and identifying trends and changes in their behaviour

The importance and influence of an organisation's vision, values and culture: indicators of organisational performance; the influence of the organisation's strategic plan and business plan on innovation; methods, theory and practice of influencing and motivating others, including methods of rewarding staff for appropriate behaviours

2 **Creative and innovative solutions**

Creative and innovative solutions: theory and application of lateral thinking, visioning and problem-solving techniques; theory and use of analytical tools — SWOT and PESTLE techniques; the use of cost/benefit analysis; decision-making processes and styles; risk analysis and risk-management techniques

3 **Cases for innovation**

Cases for innovation: main models and methods for effecting change management and their relative strengths and weaknesses; relationship between transformational and transactional change; leadership styles and behaviours, their relative strengths and how to adopt the appropriate style for different circumstances; decision-making processes and style; key stakeholders in organisations, their perceptions and motivational influences and how to influence them; different methods of communication and their relative strengths and weaknesses in various circumstances

4 **Obstacles and barriers to innovation**

Obstacles and barriers to innovation: political, bureaucratic and resource barriers techniques for addressing them; conflict resolution; the politics of working relationships; theory and practice of reward management; techniques and their applications in managing expectations; theory and application of the change/performance curve

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Challenge current ways of working and current services and products	<ul style="list-style-type: none"> • evaluate current ways of working and develop innovative ways of working, services and products • lead others into welcoming innovation and change as a positive opportunity
2 Generate and recognise creative and innovative solutions	<ul style="list-style-type: none"> • learn from experiences, reflecting regularly on own and others experiences, using these to inform innovation • identify and evaluate opportunities, threats, relevant strengths and weaknesses • realistically assess risks and benefits associated with innovations and evaluate a strategy for managing the risks involved, basing innovations upon key strengths
3 Articulate cases for innovation and persuade and influence others	<ul style="list-style-type: none"> • ensuring the rationale and benefits are clear, champion and articulate a vision and persuade all stakeholders of the vision, ensuring they accept its validity and that they celebrate the innovation • evaluate and establish key goals and priorities
4 Overcome obstacles and barriers to innovation to ensure effective innovative change is achieved	<ul style="list-style-type: none"> • identify and evaluate the obstacles to innovation and address these effectively to ensure people understand their accountabilities and what is expected of them • analyse issues and trends, evaluate their impact upon the innovation • identify strategies for achieving the vision and communicate these clearly to all involved

Guidance

Delivery

Delivery should normally be a mixture of lectures and seminars. Learners will be required to work on case studies and learners should be able to undertake research and investigation in their own workplace, supplemented by visits to organisations, wherever possible, so that learners can consider a range of policies, strategies and processes. The unit should be delivered as practically as possible as it provides numerous opportunities for experiential learning.

Visiting speakers from external organisations who can provide current examples of e-procurement (eg online businesses) would be helpful so that learners learn about approaches adopted by different types of organisations including those involved in global sourcing.

Assessment

Evidence may be in the form of assignments, examinations and/or case studies. Assignments may be based around investigations into actual online business organisations or case study material. As part of the assessment process, learners should produce a work-related or work-based report focused on supply chain management in their own organisation.

Where workplace case studies are used for assessment purposes, learners should give a clear explanation of the situations and the importance of the policies and strategies of their organisation to the situation.

Links

This unit has links with units within the National Occupational Standards in Management, in particular:

- Unit C1: Encourage innovation in your team
- Unit C2: Encourage innovation in your area of responsibility
- Unit C3: Encourage innovation in your organisation
- Unit C4: Lead change
- Unit C5: Plan change
- Unit C6: Implement change.

Resources

Sufficient library resources should be available to enable learners to achieve this unit.

Support materials

Books

- Ashkenas R, Ulrich D, Jick T and Kerr S — *The Boundaryless Organization* (Jossey-Bass, 2002) ISBN: 078795943X
- Birkinshaw J and Hagstrom P — *The Flexible Firm* (Oxford University Press, 2001) ISBN: 0199248559
- Cairncross F — *The Death of Distance* (Harvard Business School Press, 2001) ISBN: 157851438X
- Chell E — *Entrepreneurship: Globalization, Innovation and Development* (Thomson Learning, 2000) ISBN: 1861523181
- Christensen C — *Innovation and the General Manager* (McGraw-Hill, 1999) ISBN: 0073659150
- Christiansen J — *Competitive Innovation Management: Techniques to Improve Innovation Performance* (Palgrave MacMillan, 1999) ISBN: 0333800524
- Clegg B — *Creativity and Innovation for Managers* (Butterworth-Heinemann, 1999) ISBN: 0750642556
- Drucker P — *Innovation and Entrepreneurship: Practice and Principles* (Butterworth-Heinemann, 1999) ISBN: 0750643889
- Financial Times — *Mastering Global Business* (FT Prentice Hall, 1998) ISBN: 0273637061
- Ford D et al — *Managing Business Relationships* (Wiley, 2003) ISBN: 0470851252
- Galbraith J — *Designing the Global Corporation* (Jossey-Bass, 2000) ISBN: 0787952753
- Gupta A and Westney E — *Smart Globalization* (Jossey-Bass, 2003) ISBN: 0787965324
- Hammer M and Champy J — *Reengineering the Corporation* (HarperBusiness, 2004) ISBN: 0060559535
- Hofstede G — *Cultures and Organizations: Software of the Mind* (McGraw-Hill, 2004) ISBN: 0071439595
- Jones T — *Innovating at the Edge* (Butterworth-Heinemann, 2002) ISBN: 0750655194
- Konopaske R and Ivancevich J — *Global Management and Organizational Behavior* (McGraw-Hill, 2003) ISBN: 0071232516
- Mead R — *International Management* (Blackwell Publishing, 1998) ISBN: 0631200037
- Mercado S, Welford R and Prescott K — *European Business* (FT Prentice Hall, 2000) ISBN: 0273646001
- Mole J — *Mind Your Manners* (Nicholas Brealey Publishing, 2003) ISBN: 1857883144
- Neuhauser P, Bender R and Stromberg K — *Culture.com* (Wiley, 2000) ISBN: 0471645397
- Pasternack B and Viscio A — *The Centerless Corporation* (Simon & Schuster, 1998) ISBN: 0684838354
- Schneider S and Barsoux J L — *Managing Across Cultures* (Prentice Hall, 2002) ISBN: 027364663X
- Thussu D — *International Communications: Continuity and Change* (Oxford University Press, 2001) ISBN: 0340741317
- Tidd J, Bessant J and Pavitt K — *Managing Innovation* (Wiley, 2001) ISBN: 0471496154

Journals/magazines

Academy of Management Journal (Academy of Management)

British Journal of Management (Blackwell)

California Management Review (University of California, Berkeley)

EuroBusiness (European Press Ltd)

EuroMedia (Headley Bros)

European Management Journal (Elsevier)

Global Trade Review (Exportia Publishing)

Journal of Management Studies (Blackwell)

Harvard Business Review (Harvard Business School)

Management Today (Chartered Institute of Management)

MIT Sloan Management Review (MIT Sloan School of Management)

Websites

Websites in this area are constantly changing. Tutors therefore need to investigate website availability and content. The following websites are examples currently worthy of investigation.

www.asa.org.uk	Advertising Standards Authority
www.bbc.co.uk	British Broadcasting Corporation
www.benchmarkingnetwork.com	The Benchmarking Network Inc
www.bized.ac.uk	learning materials and case studies
www.britishcouncil.org.uk	British Council
www.business.com	business search engine on business background
www.cipd.uk	Chartered Institute of Personnel and Development
www.dataprotection.gov.uk	office for the Data Protection Registrar
www.direct.gov.uk	public service information
www.enterprisenetworks.co.uk	Sunday Times Archive
www.findarticles.com	Looksmart — search for articles for more than 500 publications
www.ft.com	Financial Times Archive
www.i-l-m.com	Institute of Leadership and Management
www.informationcommissioner.gov.uk	Information Commissioner's Office
www.iso9000.org	International Quality Systems Directory
www.managers.org.uk	Chartered Institute of Management
www.mintel.co.uk	Mintel International on consumer markets
www.statistics.gov.uk	UK National Government Statistics

Unit 14: Managing Finance for Strategic Managers

Learning hours: 30

NQF Level 7

Description of unit

This unit is the second of two that provide learners with a foundation in financial principles and techniques relevant to the strategic management process. To enable learners to use appropriate decision-making skills in their own organisations, this unit encourages them to explore the nature of cost-based financial data and information, the impact of the budgeting process upon the organisation, and the development of cost reduction and management procedures and processes.

To complete this unit effectively, learners will need to show an ability to create and prepare strategies to influence others, make decisions that are based on well-researched options, monitor quality of performance against organisational objectives and decide on the validity of information sources used in the decision-making process.

Learners will study issues of cost, responsibility and control in the contexts of management accounting and the management process. This unit offers learners the opportunity to enhance their competency in the construction, review and evaluation of cost-based financial information, and introduces them to the analysis, control or reduction of costs in a range of situations.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Investigate **cost concepts and their application** to the decision-making process
- 2 Control costs and participate in the **budgetary process** within an organisation
- 3 Investigate the scope and practicalities of **cost reduction and management** for an organisation.

Content

1 Cost concepts and their application

Concepts and systems: classifications in terms of object, function, product (service) and behaviour, opportunity cost, recording and analysing costs, job costing, batch costing, process costing, contract costing

Responsibility and control: cost centres, profit centres, investment centres, accountable management, planning and control methods

Application: absorption and marginal costing, their nature, similarities, differences and uses in decision making, relationship to pricing policy, standard costing, variance calculations, variance analysis and management by exception

2 Budgetary process

Process: importance to management, brief coverage of the steps in the process from functional to master budget, relationship to cost and quality control, resource utilisation and profitability, computer-assisted processes

Budgets: types, flexible and fixed budgets, zero-based budgeting

Monitoring process: budgeted and actual figures, accounting for and investigating variances, favourable and adverse, the need for prompt and relevant corrective action, brief reference to the behavioural issues relating to budgeting eg management participation, authority, performance evaluation

3 Cost reduction and management

Cost reduction: purpose compared with cost control (standard costing and budgetary control), value analysis and value engineering, difficulties with introducing cost reduction programmes, quality and value, total quality management (TQM), measuring the costs of quality

Cost management: development of activity-based costing (ABC), use in calculating costs and pricing policy, activity-based budgeting, merits and limitations of these systems

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Investigate cost concepts and their application to the decision-making process	<ul style="list-style-type: none"> • classify costs and identify their importance in pricing strategy • design an appropriate costing system for use within an organisation • make recommendations on the use and suitability of different costing techniques in an organisation
2 Control costs and participate in the budgetary process within an organisation	<ul style="list-style-type: none"> • select appropriate budgetary targets for an identified organisation • participate in the creation of a master budget for an organisation • evaluate the need for corrective action • make recommendations on the implementation of a programme of corrective action, taking account of the behavioural issues created
3 Investigate the scope and practicalities of cost reduction and management for an organisation	<ul style="list-style-type: none"> • make recommendations concerning the application of value analysis or value engineering principles within an organisation • evaluate the potential for, or use of, activity-based costing in an organisation

Guidance

Delivery

This unit allows learners to explore and utilise techniques relating to financial decision making within the strategic management process, wherever possible within their own organisation. Techniques must be couched in environments appropriate for individual learners, who should, therefore, use work-related experiences and projects. In certain circumstances, respecting the degree of confidentiality demanded, learners may be able to compare and contrast competing organisations operating within different economic sectors. Additionally, the use of case studies and current examples of issues within the public domain should be encouraged.

The unit lends itself to seminars and learner-led discussions on the investigation of cost control, reporting, analysis and reduction. Analysis should incorporate potential contingency and risk factors. They development will enhance the ability of the learner to adopt a holistic approach to the content of other units in the programme such as *Unit 2: Managing Change in Organisations* and *Unit 4: Strategic Planning and Implementation*.

Social and ethical issues regarding the validity of certain approaches to cost control or other management accounting methods may arise. These can be used positively to illustrate opportunity cost or other considerations that pervade most cost-based financial decisions.

Assessment

Assessment for this unit should reflect the learning outcomes set in context. The practical nature of the unit lends itself to tasks and exercises which will cover the costing and budgeting techniques available to managers. Tasks set may involve individual or group work with the opportunity to introduce a case study to enhance realism. However, where possible, learners should be using information, examples and research based on their own organisations or those with which they are familiar. Learners will be producing evidence of research into different approaches to cost control, participation in budgeting and capital budgeting processes, and analysis of specific approaches to cost reduction and cost management.

There must be evidence of research into cost classifications and control mechanisms, budgeting and budget-monitoring processes, and cost management. Learners should be able to provide clear explanations of the role of these technicians in the managerial decision-making process, giving relevant examples of current business practice. All learners should be able to compare and contrast approaches to management of cost, budgeting and cost reduction using relevant techniques.

The findings of learners' research, as related to the assessment mechanism used, should be presented logically and indicate some awareness of the application within the business context. It is be appropriate at this level to expect outline summaries and reasoning in an acceptable report format.

Links

This unit has links with *Unit 5: Managing Financial Principles and Techniques*. It also has links with some of the units within the National Occupational Standards in Management, in particular:

- Unit E1: Manage a budget
- Unit E2: Manage finance for your area of responsibility
- Unit E3: Obtain additional finance for the organisation.

Support materials

Books

Atrill P and McLaney E — *Management Accounting for Non-specialists, Third Edition* (FT Prentice Hall, 2002) ISBN: 0273655914

Berry A and Jarvis R — *Accounting in a Business Context* (Thomson Business Press, 1997) ISBN: 1861520905

Cox D and Fardon M — *Management of Finance* (Osborne Books, 1997) ISBN: 1872962238

Drury C — *Management Accounting for Business Decisions* (Thomson Learning, 2001) ISBN: 1861527705

Glynn J, Perrin J and Murphy M — *Accounting for Managers* (Thomson Learning, 2003) ISBN: 186152904X

Monden Y — *Cost Reduction Systems: Target Costing and Kaizen Costing* (Productivity Press, 1995) ISBN: 1563270684

Secrett M — *Mastering Spreadsheets, Budgets and Forecasts* (FT Prentice Hall, 1999) ISBN: 0273644912

Sleight S — *Managing Budgets* (Dorling Kindersley, 2000) ISBN: 0751307718

Yoshikawa T et al — *Strategic Value Analysis* (FT Prentice Hall, 2002) ISBN: 0273654292

Journals/magazines/newspapers

Specialist periodicals often provide current articles on developments in related topic areas. Newspapers can be a useful source for financial issues in both the private and public sectors.

The Financial Times

The Guardian

The Independent

Strategic Finance (Institute of Management Accountants)

Management Accounting Quarterly (Institute of Management Accountants)

Management Today (Chartered Institute of Management)

The Times

Websites

Websites provide useful information, case studies and examples of the application of financial techniques in business situations. For those managing small businesses, useful general information, including financial advice, is available on www.clearlybusiness.com.

Most of the professional accounting bodies (CIMA, ICA, CIPFA, AAT) have their own websites with access to library facilities (though if you are not a member, this may be restricted).

www.aat.co.uk	Association of Accounting Technicians
www.bized.ac.uk	learning materials and a wide range of company information
www.cimaglobal.com	Chartered Institute of Management Accountants
www.cipfa.org.uk	Chartered Institute of Public Finance and Accountancy
www.companies-house.gov.uk	Companies House home page
www.icaew.co.uk	Institute of Chartered Accountants in England and Wales
www.icsa.org.uk	Institute of Chartered Secretaries and Administrators
www.thetimes100.co.uk	a series of company case studies

Unit 15: Managing Virtual Organisations

Learning hours: 30

NQF Level 7

Description of unit

Rapid developments in information communication and technology in the last decade or so have enabled greater interaction between organisations on a global scale, not only in trade and through trans/multinational organisations, but also via partnerships and joint ventures. This means that links and networks can, and are being formed, not only between the more advanced industrial economies of ‘the West’ and the developing economies of ‘the South’, but also, following recent reforms, with more recently with the new transitional economies of the former Soviet Union, the Soviet Block and China. The increase in size of the European Union adds a further dimension to this growth and the opportunity to outsource activities.

As a result, increasing numbers of managers are working in business activities that are no longer bounded by geographic limitations and they operate in what is termed ‘virtual organisations’. This type of organisational working means managers have to form working relationships that often require awareness of different business cultures. It also requires the formation of different organisational structures and modes of operating and the use of alternative communication systems. This unit enables learners to gain realisation and understanding of the importance of these factors, as well as allowing them to review and reflect on enabling processes and systems.

Although this unit has been developed with a global or overseas perspective, it could look at national organisations where operations are being managed on a virtual organisation model.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Explore the **cultural differences** of two or three different business cultures and consider how these can be managed in terms of joint working
- 2 Develop **alternative organisational structures and communication systems** suitable for working in a virtual organisation
- 3 Investigate processes for developing **appropriate virtual teams and networks**.

Content

1 Cultural differences

Globalisation theory: globalizers, traditionalists, transformers, managing across cultures, opportunities and threats

Cultural hegemony and imperialism: nation states and national culture and business practice, differences between culture and ethnicity, avoiding xenophobic practice, observing cultural practice and impact on management practice, exploring local understanding, background preparation, occupational cultures, political awareness, handling conflict, sub cultures, comparative cultures and learning, supranational organisations, multi- and trans-cultural organisations, culture flows, local cultural behaviour, formal and informal multicultural relationships

2 Alternative organisational structures and communication systems

Virtual organisation theory: ‘boundaryless organisations’, organisational structures, matrix structures, management bureaucracy, organic and mechanistic structures, global structures, networking, business process re-engineering, organisational development, open and closed organisations, adhocracy, flexible structures, contingency theory, organisational politics and power, empowerment and delegation, joint ventures, partnerships, alliances, unitarist and pluralistic viewpoints, layering, empowerment, socio-technical systems, communication etiquettes, ‘netiquette’, communication processes, cellular working, outsourcing, online and direct communication processes

3 Appropriate virtual teams and networks

Virtual teams and networks: business relationship building and maintaining, informal and formal relationships, global network, teams vs groups, interactive communications, body language, team development theory, information exchange, team role theory, leadership theories, management style, decision making and taking, online communication, collaborative working, win-win theory, types of meetings, team behaviour, groupthink, brainstorming, team formation theory, developing synergy, team maintenance practice, inter-team relationships and working, trust building

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Explore the cultural differences of two or three different business cultures and consider how these can be managed in terms of joint working	<ul style="list-style-type: none"> • demonstrate an awareness of the value of cultural understanding • demonstrate different management practice for alternative cultures • develop formal and informal multicultural relationships
2 Develop alternative organisational structures and communication systems suitable for working in a virtual organisation	<ul style="list-style-type: none"> • implement sound management practice in a virtual organisation • create effective online and direct communication processes • create effective global structures
3 Investigate processes for developing appropriate virtual teams and networks	<ul style="list-style-type: none"> • interact effectively in a virtual organisation • plan to create an effective global network and work effectively in a global team

Guidance

Delivery

While some direct teaching input is required, interactive, reflective and comparative learning needs to be at the forefront of delivery. Groups from different cultural backgrounds, if possible, need to work on appropriate case studies and role-play incidents. Exchange with a relevant organisation or organisations elsewhere in the country or overseas is also a useful learning strategy.

The importance of informal and formal relationships should be emphasised throughout. Learners may wish to specialise in developing understanding in one overseas area and exchange this with their peers. All written work needs to be geared to the problems of the virtual organisation in terms of developing effective operational working and maintaining effective communications.

Assessment

Evidence of outcomes may be in the form of the following:

- an investigation into the practices of one organisation managing on a virtual systems approach
- a report on a case study or case studies by a ‘multicultural group’
- a reflective report following placement in an organisation managing on a virtual systems approach
- participation in a group-learning process which exchanges and compares overseas business and communication practices followed by an individual report of learning
- participation in a simulated or live team working project in an organisation managing with a virtual systems approach followed by an individual report of learning
- a report of a professional discussion on any of the above.

Links

This unit links with every other unit in this programme to an extent. However, it has particular links to *Unit 7: Management in the Wider Environment* and *Unit 18: Developing a Communication Strategy*. It also has links to units within the Level 4 BTEC Professional qualifications in Management Studies, especially *Unit 2: Communications at Work*.

This unit also links with units within the National Occupational Standards in Management, in particular:

- Unit B1: Develop and implement operational plans for your area of responsibility
- Unit B2: Map the environment in which your organisation operates
- Unit B12: Promote diversity in your organisation
- Unit C3: Encourage innovation in your organisation
- Unit D2: Develop productive working relationships with colleagues and stakeholders
- Unit E4: Promote the use of technology within your organisation.

Resources

Case studies, as well as a good range of texts and journals, need to be available. Links with organisations, both UK and overseas, working on a virtual systems approach are valuable in facilitating visits, placement or even active working participation. Video material can also be of value. Sufficient library facilities need to be available.

Support materials

Learners need to be prepared to read regularly the 'broadsheet' press and regular weekly business magazines.

Books

There is a growing range of books and other useful texts on the market and the list below is indicative. It includes some standard texts that need to be used appropriately as well as other texts that include case studies. The year of first publication has been included but many texts have been reprinted and updated over the years and the use of latest editions is encouraged.

Ashkenas R, Ulrich D, Jick T and Kerr S — *The Boundaryless Organization* (Jossey-Bass, 2002) ISBN: 078795943X

Birkinshaw J and Hagstrom P — *The Flexible Firm* (Oxford University Press, 2001) ISBN: 0199248559

Cairncross F — *The Death of Distance* (Harvard Business School Press, 2001) ISBN: 157851438X

Chell E — *Entrepreneurship: Globalization, Innovation and Development* (Thomson Learning, 2000) ISBN: 1861523181

Financial Times — *Mastering Global Business* (FT Prentice Hall, 1998) ISBN: 0273637061

Ford D et al — *Managing Business Relationships* (Wiley, 2003) ISBN: 0470851252

Galbraith J — *Designing the Global Corporation* (Jossey Bass, 2000) ISBN: 0787952753

Gupta A and Westney E — *Smart Globalization* (Jossey-Bass, 2003) ISBN: 0787965324

Hammer M and Champy J — *Reengineering the Corporation* (HarperBusiness, 2004) ISBN: 0060559535

Hofstede G — *Cultures and Organizations: Software of the Mind* (McGraw-Hill, 2004) ISBN: 0071439595

Jones T — *Innovating at the Edge* (Butterworth-Heinemann, 2002) ISBN: 0750655194

Konopaske R and Ivancevich J — *Global Management and Organizational Behavior* (McGraw-Hill, 2003) ISBN: 0071232516

Mead R — *International Management* (Blackwell Publishing, 1998) ISBN: 0631200037

Mercado S, Welford R and Prescott K — *European Business* (FT Prentice Hall, 2000) ISBN: 0273646001

Mole J — *Mind Your Manners* (Nicholas Brealey Publishing, 2003) ISBN: 1857883144

Neuhauser P, Bender R and Stromberg K — *Culture.com* (Wiley, 2000) ISBN: 0471645397

Pasternack B and Viscio A — *The Centerless Corporation* (Simon & Schuster, 1998) ISBN: 0684838354

Schneider S and Barsoux J L — *Managing Across Cultures* (Prentice Hall, 2002) ISBN: 027364663X

Thussu D — *International Communications: Continuity and Change* (Oxford University Press, 2001) ISBN: 0340741317

Journals/magazines

Most general management journals will contain some relevant articles. These have been listed along with specialist journals.

Academy of Management Journal (Academy of Management)

British Journal of Management (Blackwell)

California Management Review (University of California, Berkeley)

EuroBusiness (European Press Ltd)

EuroMedia (Headley Bros)

European Management Journal (Elsevier)

Global Trade Review (Exportia Publishing)

Harvard Business Review (Harvard Business School)

Journal of Management Studies (Blackwell)

Management Today (Chartered Institute of Management)

MIT Sloan Management Review (MIT Sloan School of Management)

Websites

The range of appropriate websites will depend on the chosen project area. However, an indicative range of general websites is given below. Websites from other units can also be consulted.

www.asa.org.uk	Advertising Standards Authority
www.bbc.co.uk	British Broadcasting Corporation
www.benchmarkingnetwork.com	The Benchmarking Network Inc
www.bized.ac.uk	learning materials and case studies
www.britishcouncil.org.uk	British Council
www.business.com	business search engine on business background
www.cipd.uk	Chartered Institute of Personnel and Development
www.dataprotection.gov.uk	office for the Data Protection Registrar
www.direct.gov.uk	public service information
www.enterprisenetworks.co.uk	Sunday Times Archive
www.findarticles.com	Looksmart — search for more than 500 publications
www.ft.com	Financial Times Archive
www.i-l-m.com	Institute of Leadership and Management
www.informationcommissioner.gov.uk	Information Commissioner's Office
www.iso9000.org	International Quality Systems Directory
www.managers.org.uk	Chartered Institute of Management
www.mintel.co.uk	Mintel International on consumer markets
www.statistics.gov.uk	UK National Government Statistics

Unit 16: Managing Human Resources Policy

Learning hours: 30

NQF Level 7

Description of unit

This unit is designed to enable learners to critically examine human resources (HR) policies in their own organisations and compare them with other organisations to identify good practice. Learners will have the opportunity to research relevant legislation and make appropriate recommendations on how to improve policy in their own work environments.

The structure and culture of an organisation contribute to the approach adopted by the organisation and learners will be able to evaluate how this affects HR.

To ensure that business objectives are achieved and to see where improvements are needed, the overall effectiveness of the HR function at both strategic and support level should be evaluated and monitored. Learners will examine approaches of performance measurement to evaluate HR effectiveness.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Examine **HR policy requirements**
- 2 Determine how an organisation's **structure and culture** contribute to HR performance
- 3 Evaluate **HR policy in a given organisation.**

Content

1 HR policy requirements

HR policy: definition of HR policies compared with procedures, importance of HR policies, policy areas eg quality of working life, working conditions, equity

Types of policy: employee development, promotion, work-life balance, quality of employees, age and employment, redundancy, ethnic monitoring, discipline, grievance, whistleblowing, bullying, smoking, harassment, reward, equal opportunities, employee relations, health and safety

2 Structure and culture

Structure: theories of organisation structure eg Weber, Mintzberg, Handy, different forms of structure and design and how these impact on HR eg functional, product-based, geographical, divisionalised, matrix; centralisation, decentralisation

Culture: what is organisation culture, inter relationships between culture and other aspects of the organisation, eg purpose and goals, rules and procedures, organisation policies; how culture impacts on the HR function, theoretical models of culture eg Handy, Hofstede, Schein

3 HR policy in a given organisation

Evaluate: analyse existing HR policies and guidance notes, examine a wide range of external influences eg employment legislation, codes of practice, ACAS; identify areas which need improvement or revision, consult and agree with line management and employees to determine views on policies

Performance measures: distinction between efficiency and effectiveness to achieve business objectives, quantitative measures eg absenteeism figures, employee retention and staff turnover, number of references to industrial tribunals, accident frequencies, cost savings from employee suggestions; qualitative measures eg employee attitude surveys, stakeholder perspective; benchmarking, service level agreements and standards, utility analysis to evaluate the costs and benefits of HR decisions

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Examine HR policy requirements	<ul style="list-style-type: none"> • compare and contrast a minimum of three HR policies across two diverse organisations
2 Determine how an organisation's structure and culture contribute to HR performance	<ul style="list-style-type: none"> • explain how one organisation's structure and culture impact on the management of HR • evaluate referring to two theoretical models
3 Evaluate HR policy in a given organisation	<ul style="list-style-type: none"> • critically analyse at least three HR policies in an organisation you are familiar with • make recommendations for improvement and monitoring the improvement

Guidance

Delivery

This unit is designed to relate a theoretical understanding of managing HR policy to a practical investigation of the function within an organisation which the learner is familiar with, taking into account the impact of organisation structure and culture. Learners will have the opportunity to combine academic research with principles and models of HRM, and relate these to their own work environments or an organisation with which they are familiar.

The unit will benefit from being delivered through range of strategies. These could include case studies, group discussion, visiting HR practitioners and visits to both public and private sector organisations.

Assessment

Assessment of this unit may be in the form of assignments, investigations of specific business organisations or case studies. Learners should compare diverse organisations, eg large and small and different industry sectors eg voluntary with the public sector, manufacturing with retail.

Links

This unit links to *Unit 6: Human Resources Planning and Development*. It also has links with units within the National Occupational Standards in Management, in particular:

- Unit B3: Develop a strategic business plan for your organisation
- Unit B4: Put the strategic business plan into action
- Unit B5: Provide leadership for your team
- Unit B6: Provide leadership in your area of responsibility
- Unit B7: Provide leadership for your organisation
- Unit D1: Develop productive working relationships with colleagues
- Unit D2: Develop productive working relationships with colleagues and stakeholders
- Unit D3: Recruit, select and keep colleagues
- Unit D7: Provide learning opportunities for colleagues
- Unit E5: Ensure your own actions reduce risks to health and safety
- Unit E6: Ensure health and safety requirements are met in your area of responsibility
- Unit E7: Ensure an effective organisational approach to health and safety.

Resources

Resources could include case study materials, visiting human resource practitioners, visits to other organisations and internet access for up-to-date legislation and information.

Support materials

Books

Armstrong M — *A Handbook of Human Resource Management Practice* (Kogan Page, 2003) ISBN: 0749441054

Beardwell I and Holden L — *Human Resource Management: A Contemporary Approach* (FT Prentice Hall, 2003) ISBN: 0273679112

Belbin M — *Team Roles at Work* (Butterworth-Heinemann, 1996) ISBN: 0750626755

Bratton J and Gold J — *Human Resource Management: Theory and Practice* (Palgrave Macmillan, 2003) ISBN: 0333993268

Journals/magazines

Management Today (Chartered Institute of Management)

People Management (Chartered Institute of Personnel and Development)

Websites

www.acas.org.uk this site contains current ACAS leaflets and publications, advice, training and other employment information

www.bized.ac.uk learning materials and case studies

www.cipd.co.uk this site contains information about recruitment, selection and employment practices

www.peoplemanagement.co.uk current online magazine of the Chartered Institute of Personnel and Development

Unit 17: Strategic Marketing Management

Learning hours: 30

NQF Level 7

Description of unit

This unit introduces marketing strategy to learners who are not professional marketers but would like to understand how to support the strategic marketing process.

This unit introduces learners to the principles of marketing strategies. It develops learners' knowledge and understanding of the formulation of a marketing plan, allows them to investigate the current marketing environment and helps them to consider how all managers in an organisation can contribute towards the achievement of marketing objectives. Learners will learn about the theoretical concepts associated with a marketing strategy and the marketing planning process and its application to different market situations.

The unit combines theory and practice. Learners will demonstrate their knowledge and understanding of marketing strategy concepts, tools and techniques and then apply the knowledge to specific situations.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Investigate the **planning principles and range of tools and techniques** involved in developing a marketing strategy
- 2 Examine a range of **marketing strategy options**
- 3 Explore the **implications of changes in the marketing environment** for organisations.

Content

1 Planning principles and range of tools and techniques

Principles: concepts, systematic approach, sequencing and scheduling of activities, integration of activities, resource requirements, timescaling, monitoring and control elements

Processes: strategic marketing planning processes (eg Peter Doyle, Malcolm McDonald) including strategic marketing analysis, marketing strategy objective setting, option evaluation, choice, formulation, implementation and control.

Strategic marketing: key definitions of strategic marketing from the Chartered Institute of Marketing and key authors, (eg Hugh Davidson; Peter Doyle; Philip Kotler; Malcolm McDonald), the nature of strategy and marketing links to corporate strategy (eg Michael Porter), role and importance of strategic marketing in an organisation

Marketing strategy: setting marketing objectives and marketing strategy, segmenting, targeting and positioning, marketing activity strategies for product/service, pricing, distribution, promotion (advertising, sales promotion, personal selling, direct marketing, public relations), people (internal, intermediaries, customer service), processes and physical evidence, e-marketing strategy, customer relationship management, resource requirements (financial, people, marketing), integration of marketing activity strategies

Tools and techniques: organisation, industry and market environment situation analysis tools and techniques (Porter's Five Forces model; structure, conduct and performance model; SWOT analysis, STEEPLE analysis, marketing audit), portfolio analysis techniques (eg BCG matrix, Product Life Cycle model)

Plan: current corporate and marketing situation, key market factors, nature and potential of key market segments, corporate objectives and strategy considerations, marketing objectives and strategy, marketing activity objectives and strategies, resource requirements including marketing budget, timescales, monitoring, review and control mechanisms

2 Marketing strategy options

Options: Porter's generic strategies (focus, cost leadership and differentiation), core competences (G Johnson and K Scholes, G Hamel and C K Prahalad), competitive advantage (H Davidson, M Porter), investment opportunity evaluation (D F Abell and J S Hammond), General Electric model, Shell directional policy matrix, market leadership, market challenger, market follower, market niche, market pioneer, offensive, defensive and value-based marketing strategies

3 Implications of changes in the marketing environment

Changes in the marketing environment: shift from supply to demand environment, fashionisation of markets, micro-markets, rising expectations, technological change, competition, globalisation, importance of service, commoditisation, erosion of brands, new constraints

Implications: changing marketing strategies: speed of new product developments, customisation, Information handling as competitive advantage, e-marketing, core focus, partnerships with customers and other stakeholders, changes to organisations — delayering, small business units, self-managing teams, re-engineering, networks and alliances, transnational organisations, learning organisations, innovation strategies, account managers, expeditionary marketing, future orientation

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Investigate the planning principles and range of tools and techniques involved in developing a marketing strategy	<ul style="list-style-type: none"> • provide a clear and accurate outline of the planning principles and processes involved in developing a marketing strategy with appropriate supporting examples • accurately describe and critically evaluate a range of tools and techniques used to produce a strategic marketing plan • provide a range of supporting examples
2 Examine a range of marketing strategy options	<ul style="list-style-type: none"> • explain with clarity a range of marketing strategy options available and evaluate their benefits and limitations, using supporting examples
3 Explore the implications of changes in the marketing environment for organisations	<ul style="list-style-type: none"> • assess the current changes in the marketing environment for an organisation • analyse how an organisation could respond to the changes • specify how a range of functional areas may develop to contribute to the achievement of an organisation's marketing objectives over a period of at least three years

Guidance

Delivery

This unit enables learners to develop a knowledge and understanding of a marketing strategy and to undertake practical activities that enable them to contribute to the development and achievement of a marketing plan.

As a 30-hour unit, there is a need to be selective in the content. Nevertheless, delivery should, convey the concepts and application of a marketing strategy and its constituent activities through taught input, research and investigation activities, discussion and group activity. Learners must be given the opportunity to explore the range of activities involved in the planning, implementing, controlling and reviewing of the marketing strategy and to consider the implications for other functional areas.

Learners should be encouraged to be creative in their work, as well as to evaluate examples of marketing strategy. Opportunities could include: marketing audits, market analyses, marketing strategies and the marketing mix.

Learners should be encouraged to use ICT resources for research and investigation activities and for producing their final assessment.

This unit could be delivered jointly with *Unit 4: Strategic Planning and Implementation* or *Unit 11: Strategic Review*, enabling learners to understand the corporate strategy as a critical underpinning activity and how it integrates into the overall marketing strategy and the marketing mix strategies.

Assessment

The assessment for this unit involves learners in the study of marketing strategy principles, activities and practice. Evidence produced for this unit should include a combination of demonstrating knowledge and understanding of marketing strategy principles and activities and their practical application to marketing strategy situations.

A range of assessment methods is suitable for use with this unit including:

- a business-style report
- case study analysis and decision activity
- a presentation
- application of portfolio and strategic analysis models
- marketing audit activities
- marketing strategy proposal and/or critical review activity
- a collection or portfolio of supporting evidence to demonstrate learners understanding of marketing strategy in practice.

Assessment involving a range of assessment methods and a combination of individual and group activities should be encouraged.

Learners should demonstrate knowledge and understanding of the concepts, tools and techniques of marketing strategy and planning, along with providing appropriate examples of marketing strategy and planning in practice. Learners should provide evidence of an understanding of the integration of marketing activity strategies and of the implications for other functional areas.

Links

This unit links to *Unit 4: Strategic Planning and Implementation*, *Unit 7: Management in the Wider Environment*, *Unit 11: Strategic Review* and *Unit 12: Supply Chain Management*.

This unit also has links with units within the National Occupational Standards in Management, in particular:

- Unit B1: Develop and implement operational plans for your area of responsibility
- Unit B3: Develop a strategic business plan for your organisation
- Unit B4: Put the strategic business plan into action
- Unit F4: Develop and review a framework for marketing.

Support materials

Books

Brassington F and Pettitt S — *Principles of Marketing, Third Edition* (FT Prentice Hall, 2002) ISBN: 0273657917

Chaffey D — *E-business and E-commerce* (FT Prentice Hall, 2003) ISBN: 0273683780

Chaston I — *E-Marketing Strategy* (McGraw-Hill, 2000) ISBN: 007709753X

Christopher M, Payne A and Ballantyne D — *Relationship Marketing: Creating Stakeholder Value* (Butterworth-Heinemann, 2001) ISBN: 0750648392

Dibb S et al — *Marketing: Concepts and Strategies, Fourth Edition* (Houghton Mifflin, 2000) ISBN: 0395962447

Doyle P — *Marketing Management and Strategy* (FT Prentice Hall, 2001) ISBN: 027365501

Fifield P — *Marketing Strategy, Second Edition* (Butterworth-Heinemann, 1998) ISBN: 0750632844

Hatton A — *The Definitive Marketing Plan* (FT Prentice Hall, 2000) ISBN: 0273649329

McDonald M — *Marketing Plans: How to Prepare Them, How to Use Them, Fifth Edition* (Butterworth-Heinemann, 2002) ISBN: 0750656255

O'Connor J and Galvin E — *Marketing in the Digital Age, Second Edition* (Prentice Hall, 1999) ISBN: 0273641956

Sleight S — *Moving to E-Business* (Dorling Kindersley, 2001) ISBN: 0751312150

Journals/magazines

Admap (World Advertising Research Centre)

Campaign (Haymarket Publishing)

European Journal of Marketing (Emerald Group Publishing)

Journal of the Academy of Marketing Science (Academy of Marketing Science)

Journal of Consumer Behaviour (Academy of Marketing Science)

Journal of Marketing Management (Westburn Publishers)

Marketing Business (The Chartered Institute of Marketing Magazine)

Marketing Intelligence and Planning (Emerald Group Publishing)

Marketing Week (Centaur Communications Ltd)

Revolution (Haynet)

Websites

www.businesslink4london.com	Business Link London with freely available resources designed to support small and medium sized businesses
www.cim.co.uk	Chartered Institute of Marketing — resources available only to members
www.hbsp.harvard.edu	extracts from Harvard Business Review articles
www.knowthis.com	Know This.com — a marketing virtual library with many free articles
www.mad.co.uk	<i>Marketing Week</i> magazine online
www.managers.org.uk	Chartered Management Institute — searchable database with access to articles and books for members only
www.marketing.haynet.com	<i>Marketing</i> magazine online
www.marketingpower.com	American Marketing Association with access to searchable free resources
www.westburn.co.uk	<i>Journal of Marketing Management</i> online

Unit 18: Developing a Communication Strategy

Learning hours: 30

NQF Level 7

Description of unit

Communication is crucial to organisational effectiveness as the basis for maintaining pace and of ensuring that change can happen at all levels of the organisation. It is through the management of sound and co-ordinated systems of communication that an organisation can integrate its various parts to ensure workforce harmonisation to achieve awareness and performance.

Organisations today need to plan their communication systems to ensure up-to-date information, knowledge and awareness are always available to all who need them.

This unit gives learners an opportunity to look to the design of a communication system within one organisation, eg their own workplace, one to which they are seconded or through a case study. This is a developing area of interest and to an extent creates 'the infrastructure' that the organisation needs to ensure all are aware, involved and committed. It is only through a planned system that organisation flows can develop upwards, sideways and downwards to ensure that required information, knowledge and awareness reaches its intended audience within or outside the organisational structure itself.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Evaluate **the strengths and weaknesses, of the current internal communication processes** in an organisation or organisations
- 2 Evaluate **the strengths and weaknesses, of the current external communication processes** in an organisation or organisations
- 3 Develop plans for the **implementation, integration and evaluation of a strategy for effective communications.**

Content

1 **The strengths and weaknesses of the current internal communication processes**

Internal communication processes: efficient and effective, integrated and coordinated systems, communication channels and flows, the grapevine, networking, conferences, newsletters and company magazines, video conferencing, email and websites, roadshows, seminars, training and appraisals, team meetings, team briefing processes, updating systems, vertical teams, action sets, lateral, downward and upward communication systems, interdepartmental/divisional, information as power, confidentiality and data protection, testing and evaluating information, primary and secondary data, organisational structure and culture, listening skills, megaphone management, unfreezing and selling change, developing synergy, evaluation processes, participation levels, types of strategy, systems thinking, connectivity, learning organisation, intellectual capital and knowledge management, strategic intelligence, decision making and taking

2 **The strengths and weaknesses of the current external communication processes**

External communication processes: efficient and effective, integrated and coordinated systems, networking, conferences, partnerships, joint ventures, customer and business forums, action sets, stakeholder inclusiveness and integration, communication channels and flows, developing relationships of trust, creating synergy, connectivity, systems thinking, inter-organisational participation processes, research processes, websites, expert institutions linkage, breaking down barriers, information exchange and negotiation, intellectual capital and knowledge management, strategic intelligence, decision making and taking, collaborative advantage, collaborative capability, 'boundaryless' organisations, virtual communications, incrementalism, scenario building, win-win and zero-sum theory

3 **Implementation, integration and evaluation of a strategy for effective communications**

Strategy for effective communications: communications as infrastructure, strategic objectives, strategic implementation, planned and emergent strategies, strategic drift, monitoring versus evaluation, feedback processes, setting and measuring outcomes, action planning, agreeing timescales, cost-benefit analysis, feedback systems, control loop, target revision, regular and exception reporting, surveys and interviews, iterative processes, formal and informal knowledge channels, measuring inputs, processes, outputs and outcomes, quantitative and qualitative measures, 80/20 rule, disseminating awareness, sustainability

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Evaluate the strengths and weaknesses, of the current internal communication processes in an organisation or organisations	<ul style="list-style-type: none"> • analyse existing methods for internal communication of appropriate information, knowledge and awareness throughout the organisation • determine communication barriers and weaknesses in terms of decisions taken and poor commitment, understanding and awareness of organisational policies and plans • suggest areas where greater coordination is necessary
2 Evaluate the strengths and weaknesses, of the current external communication processes in an organisation or organisations	<ul style="list-style-type: none"> • analyse existing communication methods for gaining and exchanging external information, knowledge and awareness appropriate to the organisation • determine communication barriers and weaknesses in terms of decisions taken and deteriorating competitiveness or customer satisfaction • suggest areas where greater coordination necessary
3 Develop plans for the implementation, integration and evaluation of a strategy for effective communications	<ul style="list-style-type: none"> • agree and plan a communication strategy to ensure the wider participation necessary • inform and implement the new communication strategy • develop measures to evaluate the ongoing effectiveness of the new communication strategy

Guidance

Delivery

Learners need to focus on a single organisation whether it be their own workplace, work placement or a case study. They can work alone or in groups. Either way, learners need to exchange approaches, findings and options for improving communications within an organisation and between it and stakeholders and others in its environment.

Learners should be encouraged to link up with external organisations such as competitors, customer groups, suppliers, councils or institutions of expertise. Learners need to confirm the value of this information, knowledge and awareness and suggest how it can be gained on an ongoing basis by the organisation and shared appropriately within it.

Learners also need to develop a process whereby information, knowledge and awareness gained from frontline working can be passed appropriately throughout the organisation.

Assessment

A variety of methods can be adopted for assessment:

- individual or group reflective reports
- individual or group reflective summaries
- individual professional discussion
- workplace evidence
- workplace testimony.

Links

This unit underpins every unit in this qualification as communication provides the ‘infrastructure’ for effectively managing any organisation. However, this unit has particular links to *Unit 15: Managing Virtual Organisations* and *Unit 10: Management Research Methods*. It also has links to the Level 4 BTEC Professional qualifications in Management Studies *Unit 2: Communications at Work*.

This unit also has links with units within the National Occupational Standards in Management, in particular:

- Unit B3: Develop a strategic business plan for your organisation
- Unit B4: Put the strategic business plan into action
- Unit D1: Develop productive working relationships with colleagues
- Unit D2: Develop productive working relationships with colleagues and stakeholders.

Resources

The internet will be necessary to provide access to information and case studies and can be useful for developing appropriate websites.

There is a technical element to this unit but the focus should be on the effective development of systems to support management decision making. Literature is emerging on the subject, which is indicated below, although appropriate articles need to be sought in either the more technical or more general management journals. Websites are similarly indicative. Sufficient library facilities need to be available.

In addition, learners should read the 'broadsheet' press and weekly business magazines on a regular basis.

Support materials

Books

A number of texts are now emerging that are directly relevant and of general relevance to the following the list is indicative:

Avgerou C — *Information Systems and Global Diversity* (Oxford University Press, 2003) ISBN: 0199263426

Beyerlein M — *Guiding the Journey to Collaborative Work Systems: A Strategic Design Workbook* (Wiley, 2003) ISBN: 0787967882

Boddy D, Boonstra A and Kennedy K — *Managing Information Systems: An Organisational Perspective* (FT Prentice Hall, 2001) ISBN: 0273655957

Chun Wei Choo — *The Knowing Organization: How Organizations Use Information to Construct Meaning, Create Knowledge and Make Decisions* (Oxford University Press, 1998) ISBN: 0195110129

Clutterbuck D and Hirst S — *Talking Business; Making Communications Work* (Butterworth Heinemann, 2002) ISBN: 0750654996

Dawson R — *Living Networks: Leading Your Company, Customers and Partners in the Hyper-connected Economy* (FT Prentice Hall, 2002) ISBN: 0130353337

Erbschloe M — *Socially Responsible IT Management* (Butterworth-Heinemann, 2002) ISBN: 1555582907

Galliers R et al — *Strategic Information Management* (Butterworth-Heinemann, 2002) ISBN: 0750656190

Holtz S — *Corporate Conversations: A Guide to Crafting Effective and Appropriate Internal Communications* (Amacom, 2003) ISBN: 0814407706

Kovacic B — *New Approaches to Organizational Communication* (State University of New York Press, 1994) ISBN: 0791419185

Little S, Quintas P and Ray T — *Managing Knowledge: An Essential Reader* (Sage Publications, 2001) ISBN: 0761972137

McKenzie J and van Winkelen C — *Understanding the Knowledgeable Organisation* (Thomson Learning, 2003) ISBN: 1861528957

Preston P — *Reshaping Communications* (Sage Publications, 2001) ISBN: 0803985630

Quirke B — *Communicating Corporate Change* (McGraw-Hill, 1996) ISBN: 0077093119

Quirke B — *Making the Connections: Using Internal Communication to Turn Strategy into Action* (Gower, 2002) ISBN: 0566085178

Stewart T A — *Intellectual Capital: The New Wealth of Organisations* (Currency, 1999) ISBN: 0385483813

Thussu D — *International Communications: Continuity and Change* (Oxford University Press, 2001) ISBN: 0340741317

Journals/magazines

Most general management journals will contain some relevant articles and have been listed together with more specialised journals.

Academy of Management Journal (Academy of Management)

British Journal of Management (Blackwell)

California Management Review (University of California, Berkeley)

Computer Business Review (Datamonitor plc)

E.Learning Age (Bizmedia)

European Management Journal (Elsevier)

Harvard Business Review (Harvard Business School)

Information Age (Infoconomy)

Information Management (Elsevir.com)

Information Technology and People (Emerald, Bradford)

International Journal of Information Management (Pergamon Press)

Internet Magazine (Emap Automation)

Journal of Information Technology (Association of Information Technology Trust/Routledge)

Journal of Management Studies (Blackwell)

Knowledge Management (Arkgroup)

Management Today (Chartered Institute of Management)

MIT Sloan Management Review (MIT Sloan School of Management)

Organisation Studies (Sage Publications)

Organisations (Sage Publications)

Videos

BBC and The Centre for Tomorrow's Company 'Communications' from the 'Building Tomorrow's Company' series (1999), available from:

235 Blackfriars Road
London SE1 8NW

Telephone: 020 7021 0550

Fax: 020 7021 0549

Email: info@tomorrowscompany.com

Website: www.tomorrowscompany.com

Websites

The number of websites available will depend on the sector, market and organisation chosen. However, an indicative range of general websites is given below.

www.bbc.co.uk	British Broadcasting Corporation
www.bized.ac.uk	learning materials and case studies
www.business.com	business search engine on business background
www.cipd.uk	Chartered Institute of Personnel and Development
www.cityoflondon.gov.uk/Corporation/leisure_heritage	City of London Business Library
www.direct.gov.uk	public service information
www.enterprisenetworks.co.uk	Enterprise Networks conference and exhibition
www.findarticles.com	Looksmart — search for articles from more than 500 publications
www.ft.com	Financial Times Archive
www.i-l-m.com	Institute of Leadership and Management
www.informationcommissioner.gov.uk	Information Commissioner's office
www.kmmagazine.com	knowledge management magazine
www.managers.org.uk	Chartered Institute of Management
www.mintel.co.uk	Mintel International on consumer markets
www.statistics.gov.uk	UK National Government Statistics

Unit 19: Quality and Systems Management

Learning hours: 30

NQF Level 7

Description of unit

This unit focuses on the effective and efficient strategic planning and control of operational systems to improve their effectiveness and efficiency. Learners will develop an understanding of the design and monitoring of systems and processes and how they can be monitored and improved.

This unit enables learners to study the development and evolution of quality and quality models and how they relate to management. Learners will be able to focus on important quality aspects within their own organisation and on improving organisational performance.

As a result of studying this unit, learners will be able to contribute to business excellence within their own organisation.

Summary of learning outcomes

To achieve this unit a learner must:

- 1 Evaluate **the strategic objectives of operations management** within the organisation
- 2 Design and monitor **appropriate systems** to ensure quality of product and services
- 3 Improve **organisational performance**.

Content

1 The strategic objectives of operations management

Strategic objectives: the importance of effective operations management; role of operations; operations strategy; strategic objectives; quality; timing; reliability; flexibility; cost; strategic decisions

2 Appropriate systems

Quality: definitions, quality gurus, evolution of quality, product quality and service quality, five quality gaps, benchmarking, best practice, self-assessment, vision, continuous improvement

Designing systems: process, objectives, systems and operations, layout and flow of processes, the impact of technology on operations and systems, total quality management (TQM) philosophy, principles, methods and techniques

Monitoring systems: quality systems, quality circles, ISO9000/EN29000, TQM, managing and monitoring quality

Models: development, eg Japanese, USA, European, Deming, Baldrige, European Foundation of Quality Management, '6 Sigma', current focus, future trends

3 Organisational performance

Action plan: purpose, aims/objectives, eg specific, measurable, achievable, realistic, time constrained (SMART), resources, targets

Initiatives: eg mission statement, business plans, quality audits/checks, service standards, people development, health and safety, energy efficiency, risk assessment, Investors in People (IiP), Hazard Analysis Critical Control Path (HACCP), ISO9000, synergy of business improvement

Monitoring organisational performance: principles of models underpin organisational performance, types of performance measures and how to determine and set them, cost/benefit analysis, risk analysis, the value of a customer focused culture, the importance of prevention rather than correction, importance of developing a continual improvement culture and how to involve others, planning, proposing, implementing and evaluating change, identifying wider implications of change within the organisation, Business Process Re-engineering (BPR)

Outcomes and assessment criteria

Outcomes	Assessment criteria for pass To achieve each outcome a learner must demonstrate the ability to:
1 Evaluate the strategic objectives of operations management within the organisation	<ul style="list-style-type: none"> • identify and explain the role and importance of effective operations management • analyse the strategic objectives of the organisation • evaluate the success of operations objectives in meeting organisational objectives
2 Design and monitor appropriate systems to ensure quality of product and services	<ul style="list-style-type: none"> • define resources, tools and systems required to support business process • define and implement quality audit systems/practice to manage and monitor quality to standards specified by the organisation and process operated • embed a quality culture to ensure continuous monitoring and development of the process
3 Improve organisational performance	<ul style="list-style-type: none"> • monitor systems and work activities and identify problems and opportunities for improvement • recommend improvements which align with the organisation's objectives and goals and which result in a reduction in the variation between what customers and other stakeholders want and what products, processes and services deliver • evaluate the wider implications of proposed changes within the organisation • plan, implement and evaluate changes within an organisation

Guidance

Delivery

This unit enables learners to develop an understanding of the issues relating to systems and quality management. Delivery should be structured so that learners are required to undertake research and investigation within their own workplace. However, learners should also have the opportunity to examine the management of systems and quality within other organisations and tutors should establish links with organisations willing to welcome investigating learners either as individuals or as groups.

The unit lends itself to organised discussion and debate on the various aspects of systems and quality management. Learners should find this approach interesting and stimulating, particularly as there is generally a wide range of experience within the learner group and frequently some strongly-held views over methodology. Learners are required to work on case studies.

Assessment

Evidence may be in the form of assignments, examinations and/or case studies. Learners should be asked to identify, research, analyse and evaluate the management of quality and systems in their own workplace. A critical and developmental report on this should form a major piece of the assessment requirement.

Learners are expected to include a clear explanation of the problem to be examined and the importance of the objectives and culture of their organisation to the problem. Learners should gather data about this problem to a level of detail that will enable them to conduct an analysis, which should provide the basis for the proposed solution. Learners should then plan the proposed improvement activity and measure the improvement gained.

Learners should conclude with a discussion of the processes for change that they have implemented and reflect on issues that could be improved.

Learners will be expected to present their findings in a logical and well-presented format that provides evidence of effective research and investigation.

Where the working situation of learners renders this activity impractical, learners should be encouraged to use a 'host' organisation, or a job situation with which they are familiar, to simulate the role of a manager. Tutors should be aware that good use can be made of all managerial situations even if these are unpaid and/or part-time in nature.

Links

This unit has links with units within the National Occupational Standards in Management, in particular:

- Unit B1: Develop and implement operational plans for your area of responsibility
- Unit F12: Improve organisational performance.

Resources

Sufficient library resources should be available.

Support materials

Books

- Banks J — *The Principles of Quality Control* (Wiley, 1989) ISBN: 0471635510
- Banks J — *The Essence of Total Quality Management* (Prentice Hall, 1997) ISBN: 0135731143
- Beckford J — *Quality: A Critical Introduction* (Routledge, 2002)
- Bicheno J — *The Quality 75: Towards Six Sigma Performance in Service and Manufacturing* (Picsie Press, 2002) ISBN: 0954124405
- Burnes B — *Managing Change* (Prentice Hall, 2004) ISBN: 0273683365
- Harrison A et al — *Cases in Operations Management, Third Edition* (FT Prentice Hall, 2002) ISBN: 0273655310
- Naylor J — *Introduction to Operations Management, Second Edition* (FT Prentice Hall, 2002) ISBN: 0273655787
- Oakland J — *TQM: Text with Cases, Third Edition* (Butterworth-Heinemann, 2003) ISBN: 0750657405
- Pike J and Barnes R — *TQM in Action* (Kluwer Academic, 1995) ISBN: 0412715309
- Slack N et al — *Operations Management* (FT Prentice Hall, 2003) ISBN: 0273679066

Journals/magazines

A good daily broadsheet eg *The Times*, *The Guardian* or *The Financial Times*

Many of the professional institutes and academic institutions publish journals relevant to this unit. Examples are:

Production, Planning and Control (Taylor and Francis Group)

The TQM Magazine (Emerald Group Publishing Ltd)

Websites

There are many websites available covering various areas of the unit. Websites can provide reports on research and current theories as well as providing case study materials. The following are examples.

www.businesscases.org/newInterface	business case studies
www.dti.gov.uk/mbp	Department of Trade and Industry — management best practice
www.efqm.org	EFQM — helping European businesses
www.european-quality.co.uk	European Quality magazine
www.hbsworkingknowledge.hbs.edu	Harvard Business School Working Knowledge
www.hse.gov.uk	Health and Safety Executive
www.hsl.gov.uk	Health and Safety Laboratory

www.iso9000.org	international directory of ISO-certified companies
www.managerwise.com	business management information and resources
www.praxiom.com	translates ISO quality standards into understandable language and presents three internal audit programmes
www.quality.co.uk	Quality Network — guide to subject of quality management
www.sussex.ac.uk/Users/dt31/TOMI/index.html	Technology and Operations Management, information on resources
www.tandf.co.uk	Taylor & Francis — international publishers of academic books and journals

Annexe A

QCA codes

The QCA National Qualifications Framework (NQF) code is known as a Qualification Accreditation Number (QAN). This is the code that features in the DfES Funding Schedule, Section 97, and is to be used for all qualification funding purposes. Each unit within a qualification will also have a QCA NQF unit code.

The QCA qualification and unit codes will appear on the learner's final certification documentation.

The QANs for qualifications in this publication are:

100/4343/3 Edexcel Level 7 BTEC Advanced Professional Award in Management Studies

100/4344/5 Edexcel Level 7 BTEC Advanced Professional Certificate in Management Studies

100/4345/7 Edexcel Level 7 BTEC Advanced Professional Diploma in Management Studies

Annexe B

The revised National Qualifications Framework

The table below indicates the position of BTEC Professional and Advanced Professional Qualifications in the revised National Qualifications Framework (NQF).

NQF		Framework for Higher Education Qualifications (FHEQ)
Original levels	Revised levels #	
5 Level 5 BTEC Advanced Professional Diplomas, Certificates and Awards	8 No current BTEC qualifications	D (doctoral) doctorates
	7 Level 7 BTEC Advanced Professional Diplomas, Certificates and Awards	M (masters) masters degrees, postgraduate certificates and diplomas
4 Level 4 BTEC Higher National Diplomas and Certificates Level 4 BTEC Professional Diplomas, Certificates and Awards	6 BTEC qualifications to be developed	H (honours) bachelors degrees, graduate certificates and diplomas
	5 Level 5 BTEC Higher National Diplomas and Certificates Level 5 BTEC Professional Diplomas, Certificates and Awards	I (intermediate) diplomas of higher education and further education, foundation degrees, higher national diplomas
	4 Level 4 BTEC Professional Diplomas, Certificates and Awards	C (certificate) certificates of higher education
3 <i>There is no change to Level 3 in the revised NQF</i> Level 3 BTEC National Diplomas, Certificates and Awards Level 3 BTEC Diplomas, Certificates and Awards Advanced GCE		
2 <i>There is no change to Level 2 in the revised NQF</i> Level 2 BTEC First Diplomas and Certificates Level 2 BTEC Diplomas, Certificates and Awards GCSEs grades A*-C		
1 <i>There is no change to Level 1 in the revised NQF</i> Level 1 BTEC Introductory Diplomas and Certificates Level 1 BTEC Diplomas, Certificates and Awards GCSEs grades D-G		
Entry <i>There is no change to Entry Level in the revised NQF</i> Entry Level BTEC Certificates in Skills for Working Life and Life Skills		

The revised NQF applies from 1 September 2004 and will be fully implemented from 1 January 2006.

The revision is designed to recognise more precisely the academic levels at the higher levels of the framework: the actual content and other attributes of the respective qualifications are not altered or diminished.

The revision also provides better alignment with the FHEQ used in universities and higher education institutions.

Level indicators in the revised NQF

The level indicators proposed by QCA for the revised NQF are a guide to qualification levels.

They describe the learning and achievement that happens at each level and show how the skills and knowledge relate to job roles. The indicators are not intended to be precise or comprehensive — they are working guides. QCA will continue to review and consult on them.

The level indicators have been designed for:

- individual learners
- parents
- teachers/tutors/trainers
- careers advisers
- employers.

Framework level	Level indicators
Entry	Entry Level qualifications recognise basic knowledge and skills and the ability to apply learning in everyday situations under direct guidance or supervision. Learning at this level involves building basic knowledge and skills and is not geared towards specific occupations.
Level 1	Level 1 qualifications recognise basic knowledge and skills and the ability to apply learning with guidance or supervision. Learning at this level is about activities which mostly relate to everyday situations and may be linked to job competence.
Level 2	Level 2 qualifications recognise the ability to gain a good knowledge and understanding of a subject area of work or study, and to perform varied tasks with some guidance or supervision. Learning at this level involves building knowledge and/or skills in relation to an area of work or a subject area and is appropriate for many job roles.
Level 3	Level 3 qualifications recognise the ability to gain, and where relevant apply a range of knowledge, skills and understanding. Learning at this level involves obtaining detailed knowledge and skills. It is appropriate for people wishing to go to university, people working independently, or in some areas supervising and training others in their field of work.
Level 4	Level 4 qualifications recognise specialist learning and involve detailed analysis of a high level of information and knowledge in an area of work or study. Learning at this level is appropriate for people working in technical and professional jobs, and/or managing and developing others. Level 4 qualifications are at a level equivalent to Certificates of Higher Education.

Framework level	Level indicators
Level 5	Level 5 qualifications recognise the ability to increase the depth of knowledge and understanding of an area of work or study to enable the formulation of solutions and responses to complex problems and situations. Learning at this level involves the demonstration of high levels of knowledge, a high level of work expertise in job roles and competence in managing and training others. Qualifications at this level are appropriate for people working as higher grade technicians, professionals or managers. Level 5 qualifications are at a level equivalent to intermediate higher education qualifications such as Diplomas of Higher Education, Foundation and other degrees that do not typically provide access to postgraduate programmes.
Level 6	Level 6 qualifications recognise a specialist high level knowledge of an area of work or study to enable the use of an individual's own ideas and research in response to complex problems and situations. Learning at this level involves the achievement of a high level of professional knowledge and is appropriate for people working as knowledge-based professionals or in professional management positions. Level 6 qualifications are at a level equivalent to Bachelors degrees with honours, graduate certificates and graduate diplomas.
Level 7	Level 7 qualifications recognise highly developed and complex levels of knowledge which enable the development of in-depth and original responses to complicated and unpredictable problems and situations. Learning at this level involves the demonstration of high level specialist professional knowledge and is appropriate for senior professionals and managers. Level 7 qualifications are at a level equivalent to Masters degrees, postgraduate certificates and postgraduate diplomas.
Level 8	Level 8 qualifications recognise leading experts or practitioners in a particular field. Learning at this level involves the development of new and creative approaches that extend or redefine existing knowledge or professional practice.

Currently, qualification titles such as 'certificate' and 'diploma' are not indicators of the level of a qualification.

Annexe C

Mapping against the National Occupational Standards in Management (2004)

National Occupational Standards unit titles \ BTEC titles	Unit 1: Advanced Professional Development	Unit 2: Managing Change in Organisations	Unit 3: Management Research – Project and Presentation	Unit 4: Strategic Planning and Implementation	Unit 5: Managing Financial Principles and Techniques	Unit 6: Human Resources Planning and Development	Unit 7: Management in the Wider Environment	Unit 8: Leadership of Your Organisation	Unit 9: Culture Climate Values	Unit 10: Management Research Methods	Unit 11: Strategic Review	Unit 12: Supply Chain Management	Unit 13: The Creative Manager	Unit 14: Managing Finance for Strategic Managers	Unit 15: Managing Virtual Organisations	Unit 16: Managing Human Resources Policy	Unit 17: Strategic Marketing Management	Unit 18: Developing a Communication Strategy	Unit 19: Quality and Systems Management
A: Managing self and personal skills																			
A1: Manage your own resources	✓																		
A2: Manage your own resources and professional development	✓																		
A3: Develop your personal networks																			
B: Providing direction																			
B1: Develop and implement operational plans for your area of responsibility			✓									✓			✓		✓		✓
B2: Map the environment in which your organisation operates								✓				✓			✓				

National Occupational Standards unit titles \ BTEC titles	Unit 1: Advanced Professional Development	Unit 2: Managing Change in Organisations	Unit 3: Management Research — Project and Presentation	Unit 4: Strategic Planning and Implementation	Unit 5: Managing Financial Principles and Techniques	Unit 6: Human Resources Planning and Development	Unit 7: Management in the Wider Environment	Unit 8: Leadership of Your Organisation	Unit 9: Culture Climate Values	Unit 10: Management Research Methods	Unit 11: Strategic Review	Unit 12: Supply Chain Management	Unit 13: The Creative Manager	Unit 14: Managing Finance for Strategic Managers	Unit 15: Managing Virtual Organisations	Unit 16: Managing Human Resources Policy	Unit 17: Strategic Marketing Management	Unit 18: Developing a Communication Strategy	Unit 19: Quality and Systems Management
B3: Develop a strategic business plan for your organisation			✓	✓				✓			✓					✓	✓	✓	
B4: Put the strategic business plan into action			✓	✓							✓					✓	✓	✓	
B5: Provide leadership for your team																✓			
B6: Provide leadership in your area of responsibility	✓															✓			
B7: Provide leadership for your organisation	✓	✓				✓		✓								✓			
B8: Ensure compliance with legal, regulatory, ethical and social requirements						✓	✓												
B9: Develop the culture of your organisation								✓	✓										
B10: Manage risk																			
B11: Promote diversity in your area of responsibility							✓												

National Occupational Standards unit titles / BTEC titles	Unit 1: Advanced Professional Development	Unit 2: Managing Change in Organisations	Unit 3: Management Research — Project and Presentation	Unit 4: Strategic Planning and Implementation	Unit 5: Managing Financial Principles and Techniques	Unit 6: Human Resources Planning and Development	Unit 7: Management in the Wider Environment	Unit 8: Leadership of Your Organisation	Unit 9: Culture Climate Values	Unit 10: Management Research Methods	Unit 11: Strategic Review	Unit 12: Supply Chain Management	Unit 13: The Creative Manager	Unit 14: Managing Finance for Strategic Managers	Unit 15: Managing Virtual Organisations	Unit 16: Managing Human Resources Policy	Unit 17: Strategic Marketing Management	Unit 18: Developing a Communication Strategy	Unit 19: Quality and Systems Management
B12: Promote diversity in your organisation						✓	✓		✓						✓				
C: Facilitating change																			
C1: Encourage innovation in your team													✓						
C2: Encourage innovation in your area of responsibility													✓						
C3: Encourage innovation in your organisation													✓	✓					
C4: Lead change		✓							✓				✓						
C5: Plan change		✓								✓			✓						
C6: Implement change		✓							✓				✓						
D: Working with people																			
D1: Develop productive working relationships with colleagues						✓										✓		✓	
D2: Develop productive working relationships with colleagues and stakeholders		✓				✓			✓					✓	✓			✓	

National Occupational Standards unit titles \ BTEC titles	Unit 1: Advanced Professional Development	Unit 2: Managing Change in Organisations	Unit 3: Management Research — Project and Presentation	Unit 4: Strategic Planning and Implementation	Unit 5: Managing Financial Principles and Techniques	Unit 6: Human Resources Planning and Development	Unit 7: Management in the Wider Environment	Unit 8: Leadership of Your Organisation	Unit 9: Culture Climate Values	Unit 10: Management Research Methods	Unit 11: Strategic Review	Unit 12: Supply Chain Management	Unit 13: The Creative Manager	Unit 14: Managing Finance for Strategic Managers	Unit 15: Managing Virtual Organisations	Unit 16: Managing Human Resources Policy	Unit 17: Strategic Marketing Management	Unit 18: Developing a Communication Strategy	Unit 19: Quality and Systems Management
D3: Recruit, select and keep colleagues																✓			
D4: Plan the workforce								✓											
D5: Allocate and check work in your team																			
D6: Allocate and monitor the progress and quality of work in your area of responsibility																			
D7: Provide learning opportunities for colleagues																✓			
E: Using resources																			
E1: Manage a budget														✓					
E2: Manage finance for your area of responsibility					✓									✓					
E3: Obtain additional finance for the organisation					✓									✓					

National Occupational Standards unit titles \ BTEC titles	Unit 1: Advanced Professional Development	Unit 2: Managing Change in Organisations	Unit 3: Management Research — Project and Presentation	Unit 4: Strategic Planning and Implementation	Unit 5: Managing Financial Principles and Techniques	Unit 6: Human Resources Planning and Development	Unit 7: Management in the Wider Environment	Unit 8: Leadership of Your Organisation	Unit 9: Culture Climate Values	Unit 10: Management Research Methods	Unit 11: Strategic Review	Unit 12: Supply Chain Management	Unit 13: The Creative Manager	Unit 14: Managing Finance for Strategic Managers	Unit 15: Managing Virtual Organisations	Unit 16: Managing Human Resources Policy	Unit 17: Strategic Marketing Management	Unit 18: Developing a Communication Strategy	Unit 19: Quality and Systems Management
E4: Promote the use of technology within your organisation										✓					✓				
E5: Ensure your own action reduce risks to health and safety (ENTO unit A)																✓			
E6: Ensure health and safety requirements are met in your area of responsibility																✓			
E7: Ensure an effective organisational approach to health and safety																✓			
F: Achieving results																			
F1: Manage projects			✓																
F2: Manage a programme of complementary projects										✓									
F3: Manage business processes																			
F4: Develop and review a framework for marketing			✓									✓					✓		

National Occupational Standards unit titles	Unit 1: Advanced Professional Development	Unit 2: Managing Change in Organisations	Unit 3: Management Research — Project and Presentation	Unit 4: Strategic Planning and Implementation	Unit 5: Managing Financial Principles and Techniques	Unit 6: Human Resources Planning and Development	Unit 7: Management in the Wider Environment	Unit 8: Leadership of Your Organisation	Unit 9: Culture Climate Values	Unit 10: Management Research Methods	Unit 11: Strategic Review	Unit 12: Supply Chain Management	Unit 13: The Creative Manager	Unit 14: Managing Finance for Strategic Managers	Unit 15: Managing Virtual Organisations	Unit 16: Managing Human Resources Policy	Unit 17: Strategic Marketing Management	Unit 18: Developing a Communication Strategy	Unit 19: Quality and Systems Management
F5: Resolve customer service problems (Unit 4 in Customer Service NOS at Level 2)																			
F6: Monitor and solve customer service problems (Unit 4 in Customer Service NOS at Level 3)																			
F7: Support customer service improvements (Unit 5 in Customer Service NOS at Level 2)																			
F8: Work with others to improve customer service (Unit 3 in Customer Service NOS at Level 3)																			
F9: Build your organisation's understanding of its market and customers												✓							

National Occupational Standards unit titles	BTEC titles																		
	Unit 1: Advanced Professional Development	Unit 2: Managing Change in Organisations	Unit 3: Management Research — Project and Presentation	Unit 4: Strategic Planning and Implementation	Unit 5: Managing Financial Principles and Techniques	Unit 6: Human Resources Planning and Development	Unit 7: Management in the Wider Environment	Unit 8: Leadership of Your Organisation	Unit 9: Culture Climate Values	Unit 10: Management Research Methods	Unit 11: Strategic Review	Unit 12: Supply Chain Management	Unit 13: The Creative Manager	Unit 14: Managing Finance for Strategic Managers	Unit 15: Managing Virtual Organisations	Unit 16: Managing Human Resources Policy	Unit 17: Strategic Marketing Management	Unit 18: Developing a Communication Strategy	Unit 19: Quality and Systems Management
F10: Develop a customer focused organisation										✓		✓							
F11: Manage the achievement of customer satisfaction																			
F12: Improve organisational performance			✓	✓	✓					✓									✓

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