Qualification Specification

# ProQual Level 2 Certificate/Diploma in Business Skills

# ProQual Level 2 Certificate/Diploma in
# Business Skills



These qualifications are part of ProQual's broad offer of qualifications in the Business Administration and Management Sector.

To find out more about other qualifications in this, or any other sector, or for our latest fees; check our Fees Schedule via the QR code below:



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# Introduction

The ProQual Level 2 Certifcate/Diploma in Business Skills provides a nationally recognised qualification in up-to-date and modern business practices. These qualifications feature multiple pathways to enable candidates to specialise in an area of business that is of interest to them, or – through the open pathway – to mix and match units they would like to complete. This qualification is ideal for young people, school leavers and career changers who wish to develop their skills and enter the business sector in a range of roles. This qualification would also suit those who are currently working in the sector, and who are looking to upskill.

This qualification would be well suited to a distance or blended learning delivery.

The aims of this qualification are:

- To develop the required knowledge of modern business practices, in a range of job roles.
- To provide an opportunity for candidates to develop and demonstrate competence at a range of fundamental business skills.
- To facilitate career development within the business sector.

The awarding body for this qualification is ProQual AB. This qualification has been approved for delivery in England. The regulatory body for this qualification is Ofqual, and this qualification has been accredited onto the Regulated Qualification Framework (RQF), and has been published in Ofqual's Register of Qualifications.

## Qualification Profile

| | |
|---|---|
| **Qualification Title:** | ProQual Level 2 Certificate in Business Skills |
| **Qualification Number:** | 610/5399/5 |
| **Level:** | 2 |
| **Total Qualification Time (TQT):** | Minimum 290 Hours<br>Minimum 29 Credits |
| **Guided Learning Hours (GLH):** | Minimum 160 Hours |
| **Assessment:** | Pass/Fail |
| | Internally assessed and verified by centre staff |
| | Externally verified by ProQual verifiers |
| **Qualification Start Date:** | 02/06/2025 |
| **Qualification Review Date:** | 02/06/2028 |

| | |
|---|---|
| **Qualification Title:** | ProQual Level 2 Diploma in Business Skills |
| **Qualification Number:** | 610/5400/8 |
| **Level:** | 2 |
| **Total Qualification Time (TQT):** | Minimum 370 Hours<br>Minimum 37 Credits |
| **Guided Learning Hours (GLH):** | Minimum 190 Hours |
| **Assessment:** | Pass/Fail |
| | Internally assessed and verified by centre staff |
| | Externally verified by ProQual verifiers |
| **Qualification Start Date:** | 02/06/2025 |
| **Qualification Review Date:** | 02/06/2028 |

# Learner Profile

There are no formal academic entry requirements for this qualification. Centres should carry out their own initial assessment of candidate skills and knowledge in order to identify gaps, plan the assessment, and satisfy themselves that the candidate will be able to access this qualification. If candidates are not yet ready to access this qualification, they may consider the ProQual Level 1 Qualifications in Preparing to Work in the Business Sector.

Learners must be **at least** 14 years old on the day that they are registered for this qualification. Centres are reminded that no assessment activity should take place until a candidate has been registered.

Candidates may already be employed in the business sector, but that is not a requirement for this qualification, as competence of practical skills may be evidenced through the use of case studies and simulated assessment.

Candidates who complete this qualification may progress onto other qualifications with the ProQual Suite of Administration and Management, such as the ProQual Level 3 Certificate/Diploma in Advanced Business Skills.

# Qualification Structure

This qualification consists of six pathways, allowing candidates to specialise in an area of the business sector that is of interest to them. Each pathway consists of a different combination of units, as detailed below.

Additionally, candidates may complete a number of units from different specialisms as part of the 'Open' pathway.

The pathway a candidate completes will appear on their qualification certificate, next to the title of the qualification.

**Pathway One: Business Administration**

This pathway consists of **four** mandatory units. Candidates must complete all mandatory units to complete this pathway.

Candidates for the Certificate must then complete **one** additional unit from the list of allowed optional units. Candidates for the Diploma must complete **at least two** additional units from the list of allowed optional units.

| Unit Number | Unit Title | Level | TQT | GLH |
|---|---|---|---|---|
| Mandatory Units – Candidates must complete **all** units in this group. | | | | |
| T/651/4929 | Principles and Practice of Personal Development | 2 | 40 | 15 |
| D/651/4930 | Communication for Business | 2 | 40 | 30 |
| F/651/4931 | Office Software – Fundamental Skills | 2 | 70 | 35 |
| M/651/4936 | Principles and Practice of Business Administration | 2 | 70 | 50 |
| Optional Units – Candidates for the Certificate must complete **one** unit from this group. Candidates for the Diploma must complete **at least two** units from this group. | | | | |
| R/651/4937 | Principles and Practice of Reception Duties | 2 | 70 | 30 |
| L/651/4944 | Supporting Work Practices in a Business Environment | 2 | 80 | 55 |
| Y/651/4948 | Principles of Document Design and Production | 2 | 100 | 70 |
| A/651/4949 | Information Management for Business | 2 | 100 | 80 |
| H/651/4950 | Processing Customer Information | 2 | 80 | 50 |

**Pathway Two: Management and Leadership**

This pathway consists of **four** mandatory units. Candidates must complete all mandatory units to complete this pathway.

Candidates for the Certificate must then complete **one** additional unit from the list of allowed optional units. Candidates for the Diploma must complete **at least two** additional units from the list of allowed optional units.

| Unit Number | Unit Title | Level | TQT | GLH |
|---|---|---|---|---|
| Mandatory Units – Candidates must complete **all** units in this group. | | | | |
| T/651/4929 | Principles and Practice of Personal Development | 2 | 40 | 15 |
| D/651/4930 | Communication for Business | 2 | 40 | 30 |
| J/651/4951 | Promoting Equality and Diversity | 2 | 80 | 70 |
| K/651/4952 | Principles of Team Leadership | 2 | 70 | 50 |
| Optional Units – Candidates for the Certificate must complete **one** unit from this group. Candidates for the Diploma must complete **at least two** units from this group. | | | | |
| L/651/4944 | Supporting Work Practices in a Business Environment | 2 | 80 | 55 |
| F/651/4931 | Office Software – Fundamental Skills | 2 | 70 | 35 |
| L/651/4953 | Developing and Delivering Presentations | 2 | 100 | 50 |
| R/651/4955 | Monitoring and Developing Employees | 2 | 120 | 80 |
| T/651/4956 | Managing Team Communications | 2 | 100 | 70 |
| Y/651/4984 | Promoting Team Wellbeing | 2 | 90 | 70 |
| A/651/4985 | Leading Meetings in a Business Setting | 2 | 80 | 50 |
| D/651/4986 | Managing Conflicts in the Work Environment | 2 | 120 | 100 |

**Pathway Three: Marketing and Sales**

This pathway consists of **three** mandatory units. Candidates must complete all mandatory units to complete this pathway.

Candidates for the Certificate must then complete **two** additional unit from the list of allowed optional units. Candidates for the Diploma must complete **at least three** additional units from the list of allowed optional units.

| Unit Number | Unit Title | Level | TQT | GLH |
|---|---|---|---|---|
| Mandatory Units – Candidates must complete **all** units in this group. | | | | |
| T/651/4929 | Principles and Practice of Personal Development | 2 | 40 | 15 |
| D/651/4930 | Communication for Business | 2 | 40 | 30 |
| F/651/4931 | Office Software – Fundamental Skills | 2 | 70 | 35 |
| Optional Units – Candidates for the Certificate must complete **two** units from this group. Candidates for the Diploma must complete **at least three** units from this group. | | | | |
| L/651/4953 | Developing and Delivering Presentations | 2 | 100 | 50 |
| T/651/4992 | Winning and Retaining Customers | 2 | 100 | 80 |
| Y/651/4993 | Social Media for Business | 2 | 80 | 70 |
| F/651/4996 | SEO for Business | 2 | 80 | 70 |
| J/651/5012 | Managing Brand Identity and Reputation | 2 | 80 | 60 |
| J/651/5176 | Principles and Practice of Email Marketing | 2 | 80 | 50 |
| L/651/5014 | Building and Maintaining Sales Relationships | 2 | 100 | 80 |
| K/651/5013 | Negotiating and Closing Sales | 2 | 100 | 70 |
| K/651/5040 | Understanding Sales Tools and Technologies | 2 | 70 | 40 |
| A/651/5064 | Selling Products and Services Face to Face | 2 | 100 | 80 |
| D/651/5065 | Selling Products and Services Remotely | 2 | 100 | 80 |
| F/651/5066 | Selling Products and Services Internationally | 2 | 100 | 80 |

**Pathway Four: Customer Service**

This pathway consists of **four** mandatory units. Candidates must complete all mandatory units to complete this pathway.

Candidates for the Certificate must then complete **one** additional unit from the list of allowed optional units. Candidates for the Diploma must complete **at least two** additional units from the list of allowed optional units.

| Unit Number | Unit Title | Level | TQT | GLH |
|---|---|---|---|---|
| Mandatory Units – Candidates must complete **all** units in this group. | | | | |
| T/651/4929 | Principles and Practice of Personal Development | 2 | 40 | 15 |
| D/651/4930 | Communication for Business | 2 | 40 | 30 |
| F/651/4931 | Office Software – Fundamental Skills | 2 | 70 | 35 |
| H/651/5067 | Principles and Practice of Customer Service | 2 | 70 | 50 |
| Optional Units – Candidates for the Certificate must complete **one** unit from this group. Candidates for the Diploma must complete **at least two** units from this group. | | | | |
| T/651/4992 | Winning and Retaining Customers | 2 | 100 | 80 |
| J/651/5068 | Processing Customer Information | 2 | 80 | 50 |
| K/651/5069 | Providing Customer Support Online | 2 | 80 | 70 |
| D/651/5137 | Being a Customer Service Champion | 2 | 100 | 80 |
| M/651/5150 | Delivering Customer Service to Challenging Customers | 2 | 120 | 100 |
| R/651/5151 | Handling Customer Complaints | 2 | 120 | 100 |

**Pathway Five: Entrepreneurship**

This pathway consists of **three** mandatory units. Candidates must complete all mandatory units to complete this pathway.

Candidates for the Certificate must then complete **two** additional units from Option Group A. Candidates for the Diploma must complete **two** additional units from Option Group A, and then a further **one** unit from either Option Group A or Option Group B.

| Unit Number | Unit Title | Level | TQT | GLH |
|---|---|---|---|---|
| Mandatory Units – Candidates must complete **all** units in this group. | | | | |
| T/651/4929 | Principles and Practice of Personal Development | 2 | 40 | 15 |
| D/651/4930 | Communication for Business | 2 | 40 | 30 |
| F/651/4931 | Office Software – Fundamental Skills | 2 | 70 | 35 |
| Option Group A<br>Candidates for the Certificate must complete **two** units from this group.<br>Candidates for the Diploma must complete **at least two** units from this group. | | | | |
| T/651/5152 | Planning Business Direction | 2 | 80 | 50 |
| Y/651/5153 | Running a Home-Based Business | 2 | 100 | 70 |
| A/651/5154 | Principles and Practice of Freelance Services | 2 | 100 | 80 |
| D/651/5155 | Exploring Business Potential | 2 | 80 | 50 |
| R/651/5160 | Developing a Business Vision and Goals | 2 | 80 | 50 |
| Option Group B<br>Candidates for the Diploma may complete **one** unit from this group | | | | |
| L/651/4953 | Developing and Delivering Presentations | 2 | 100 | 50 |
| T/651/4992 | Winning and Retaining Customers | 2 | 100 | 80 |
| J/651/5012 | Managing Brand Identity and Reputation | 2 | 80 | 60 |
| R/651/4955 | Monitoring and Developing Employees | 2 | 120 | 80 |
| T/651/4956 | Managing Team Communications | 2 | 100 | 70 |
| T/651/5161 | Understanding Business Structures | 2 | 70 | 50 |
| Y/651/5162 | Principles and Practice of Financial Records for Business | 2 | 120 | 100 |
| A/651/5163 | Managing Cash Flow for Business | 2 | 100 | 90 |
| D/651/5164 | Principles and Practice of Business Banking | 2 | 100 | 80 |
| H/651/5166 | Preparing and Paying Wages | 2 | 80 | 70 |

**Pathway Six: Finance and Accounting**

This pathway consists of **three** mandatory units. Candidates must complete all mandatory units to complete this pathway.

Candidates for the Certificate must then complete **two** additional units from the list of allowed optional units. Candidates for the Diploma must complete **at least three** additional units from the list of allowed optional units.

| Unit Number | Unit Title | Level | TQT | GLH |
|---|---|---|---|---|
| Mandatory Units – Candidates must complete **all** units in this group. | | | | |
| T/651/4929 | Principles and Practice of Personal Development | 2 | 40 | 15 |
| D/651/4930 | Communication for Business | 2 | 40 | 30 |
| F/651/4931 | Office Software – Fundamental Skills | 2 | 70 | 35 |
| Optional Units – Candidates for the Certificate must complete **two** units from this group. Candidates for the Diploma must complete **at least three** units from this group. | | | | |
| A/651/4949 | Information Management for Business | 2 | 100 | 80 |
| Y/651/5162 | Principles and Practice of Financial Records for Business | 2 | 120 | 100 |
| A/651/5163 | Managing Cash Flow for Business | 2 | 100 | 90 |
| D/651/5164 | Principles and Practice of Business Banking | 2 | 100 | 80 |
| F/651/5165 | Managing Customer Payments | 2 | 100 | 80 |
| H/651/5166 | Preparing and Paying Wages | 2 | 80 | 70 |

**Pathway Seven: Open**

This pathway consists of **three** mandatory units. Candidates must complete all mandatory units to complete this pathway.

Candidates for the Certificate must then complete **two** additional units from the list of allowed optional units. Candidates for the Diploma must complete **at least three** additional units from the list of allowed optional units.

| Unit Number | Unit Title | Level | TQT | GLH |
|---|---|---|---|---|
| Mandatory Units – Candidates must complete **all** units in this group. | | | | |
| T/651/4929 | Principles and Practice of Personal Development | 2 | 40 | 15 |
| D/651/4930 | Communication for Business | 2 | 40 | 30 |
| F/651/4931 | Office Software – Fundamental Skills | 2 | 70 | 35 |
| Optional Units – Candidates for the Certificate must complete **two** units from this group. Candidates for the Diploma must complete **at least three** units from this group. | | | | |
| M/651/4936 | Principles and Practice of Business Administration | 2 | 70 | 50 |
| R/651/4937 | Principles and Practice of Reception Duties | 2 | 70 | 30 |
| L/651/4944 | Supporting Work Practices in a Business Environment | 2 | 80 | 55 |
| Y/651/4948 | Principles of Document Design and Production | 2 | 100 | 70 |
| A/651/4949 | Information Management for Business | 2 | 100 | 80 |
| H/651/4950 | Processing Customer Information | 2 | 80 | 50 |
| J/651/4951 | Promoting Equality and Diversity | 2 | 80 | 70 |
| K/651/4952 | Principles of Team Leadership | 2 | 70 | 50 |
| L/651/4953 | Developing and Delivering Presentations | 2 | 100 | 50 |
| R/651/4955 | Monitoring and Developing Employees | 2 | 120 | 80 |
| T/651/4956 | Managing Team Communications | 2 | 100 | 70 |
| Y/651/4984 | Promoting Team Wellbeing | 2 | 90 | 70 |
| A/651/4985 | Leading Meetings in a Business Setting | 2 | 80 | 50 |
| D/651/4986 | Managing Conflicts in the Work Environment | 2 | 120 | 100 |
| T/651/4992 | Winning and Retaining Customers | 2 | 100 | 80 |
| Y/651/4993 | Social Media for Business | 2 | 80 | 70 |
| F/651/4996 | SEO for Business | 2 | 80 | 70 |
| J/651/5012 | Managing Brand Identity and Reputation | 2 | 80 | 60 |
| J/651/5176 | Principles and Practice of Email Marketing | 2 | 80 | 50 |
| L/651/5014 | Building and Maintaining Sales Relationships | 2 | 100 | 80 |

| Unit Number | Unit Title | Level | TQT | GLH |
|---|---|---|---|---|
| K/651/5013 | Negotiating and Closing Sales | 2 | 100 | 70 |
| K/651/5040 | Understanding Sales Tools and Technologies | 2 | 70 | 40 |
| A/651/5064 | Selling Products and Services Face to Face | 2 | 100 | 80 |
| D/651/5065 | Selling Products and Services Remotely | 2 | 100 | 80 |
| F/651/5066 | Selling Products and Services Internationally | 2 | 100 | 80 |
| H/651/5067 | Principles and Practice of Customer Service | 2 | 70 | 50 |
| K/651/5069 | Providing Customer Support Online | 2 | 80 | 70 |
| D/651/5137 | Being a Customer Service Champion | 2 | 100 | 80 |
| M/651/5150 | Delivering Customer Service to Challenging Customers | 2 | 120 | 100 |
| R/651/5151 | Handling Customer Complaints | 2 | 120 | 100 |
| T/651/5152 | Planning Business Direction | 2 | 80 | 50 |
| Y/651/5153 | Running a Home-Based Business | 2 | 100 | 70 |
| A/651/5154 | Principles and Practice of Freelance Services | 2 | 100 | 80 |
| D/651/5155 | Exploring Business Potential | 2 | 80 | 50 |
| R/651/5160 | Developing a Business Vision and Goals | 2 | 80 | 50 |
| T/651/5161 | Understanding Business Structures | 2 | 70 | 50 |
| Y/651/5162 | Principles and Practice of Financial Records for Business | 2 | 120 | 100 |
| A/651/5163 | Managing Cash Flow for Business | 2 | 100 | 90 |
| D/651/5164 | Principles and Practice of Business Banking | 2 | 100 | 80 |
| F/651/5165 | Managing Customer Payments | 2 | 100 | 80 |
| H/651/5166 | Preparing and Paying Wages | 2 | 80 | 70 |

# Centre Requirements

Centres must be approved to deliver this qualification. If your centre is not approved to deliver this qualification, please complete and submit the **ProQual Additional Qualification Approval Form.**

Materials produced by centres to support candidates should:

- Enable them to track their achievements as they progress through the learning outcomes and assessment criteria.
- Provide information on where ProQual's policies and procedures can be viewed.
- Provide a means of enabling Internal and External Quality Assurance staff to authenticate evidence.

Centres must have the appropriate equipment to enable candidates to carry out the practical requirements of this qualification.

# Certification

Candidates who achieve the requirements for this qualification will be awarded:

- A certificate listing all units achieved, and
- A certificate giving the full qualification title:

**ProQual Level 2 Certificate in Business Skills**

**ProQual Level 2 Diploma in Business Skills**

### Claiming certificates

Centres may claim certificates for candidates who have been registered with ProQual and who have successfully achieved the qualification. All certificates will be issued to the centre for successful candidates.

### Unit certificates

If a candidate does not achieve all of the units required for a qualification, the centre may claim a unit certificate for the candidate which will list all of the units achieved.

### Replacement certificates

If a replacement certificate is required a request must be made to ProQual in writing. Replacement certificates are labelled as such and are only provided when the claim has been authenticated. Refer to the Fee Schedule for details of charges for replacement.

# Assessment Requirements

Each candidate is required to produce a portfolio of evidence which demonstrates their achievement of all of the learning outcomes and assessment criteria for each unit.

Evidence can include:

- Observation report by assessor.
- Assignments/projects/reports.
- Professional discussion.
- Witness testimony.
- Candidate product.
- Worksheets.
- Record of oral and written questioning.
- Recognition of Prior Learning.

Candidates must demonstrate the level of competence described in the units. Assessment is the process of measuring a candidate's skill, knowledge and understanding against the standards set in the qualification.

Centre staff assessing this qualification must be **occupationally competent** and qualified to make assessment decisions. Assessors who are suitably qualified may hold a qualification such as, but not limited to:

- ProQual Level 3 Certificate in Teaching, Training and Assessment.
- ProQual Level 3 Award in Education and Training.
- ProQual Level 3 Award in Assessing Competence in the Work Environment. *(Suitable for assessment taking place in a working salon <u>only.</u>)*
- ProQual Level 3 Award in Assessing Vocational Achievement. *(Suitable for assessment taking place in a simulated training environment <u>only</u>.)*

Candidate portfolios must be internally verified by centre staff who are **occupationally knowledgeable** and qualified to make quality assurance decisions. Internal verifiers who are suitably qualified may hold a qualification such as:

- ProQual Level 4 Award in the Internal QA of Assessment Processes and Practice.
- ProQual Level 4 Certificate in Leading the Internal QA of Assessment Processes and Practice.

**Occupationally competent** means capable of carrying out the full requirements contained within a unit. **Occupationally knowledgeable** means possessing relevant knowledge and understanding.

# Enquiries, Appeals and Adjustments

Adjustments to standard assessment arrangements are made on the individual needs of candidates. ProQual's Reasonable Adjustments Policy and Special Consideration Policy sets out the steps to follow when implementing reasonable adjustments and special considerations and the service that ProQual provides for some of these arrangements.

Centres should contact ProQual for further information or queries about the contents of the policy.

All enquiries relating to assessment or other decisions should be dealt with by centres, with reference to ProQual's Enquiries and Appeals Procedures.

# Units – Learning Outcomes and Assessment Criteria

| Title: | Principles and Practice of Personal Development | Level: | 2 |
|---|---|---|---|
| Unit Number: | T/651/4929 | TQT: | 40 | GLH: | 15 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles of personal development. | 1.1 | Explain why personal development is important within the workplace. |
| | | 1.2 | Identify sources of information and support for personal development. |
| | | 1.3 | Describe the benefits of setting personal and professional goals. |
| | | 1.4 | Outline the key stages of a personal development plan. |
| 2 | Understand the importance of reflective practice. | 2.1 | Define the term 'reflective practice'. |
| | | 2.2 | Explain the role of reflective practice in professional development. |
| | | 2.3 | Describe methods for gathering feedback from others to support personal development. |
| | | 2.4 | Describe **two** models of reflective practice. |
| | | 2.5 | Explain how reflective practice can improve performance and workplace relationships. |
| | | 2.6 | Identify strategies for embedding reflective practice into daily work activities. |
| 3 | Reflect on own knowledge, skills, and behaviour. | 3.1 | Assess current knowledge, skills, and behaviours relevant to own job role or desired job role. |
| | | 3.2 | Identify strengths and areas for improvement, relating to own job role or desired job role. |

| 4 | Plan and implement a personal development plan. | 4.1 | Identify personal and professional development needs based on self-assessment and feedback. |
| | | 4.2 | Set SMART (Specific, Measurable, Achievable, Relevant, Time-bound) objectives for personal development. |
| | | 4.3 | Develop an action plan to achieve personal and professional goals. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Communication for Business | Level: | 2 |
|---|---|---|---|
| Unit Number: | D/651/4930 | TQT: 40 | GLH: 30 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand methods of communication in the workplace. | 1.1 | Identify different methods of communication used in a business environment. |
| | | 1.2 | Describe the advantages and disadvantages of different communication methods. |
| | | 1.3 | Explain when to use different communication methods depending on the situation and audience. |
| | | 1.4 | Describe how technology has influenced workplace communication. |
| 2 | Understand the expectations of professional communication. | 2.1 | Identify differences between personal and professional communication. |
| | | 2.2 | Explain the importance of professional communication in the workplace. |
| | | 2.3 | Describe the key principles of professional communication, including:<br><br>• Clarity.<br>• Tone.<br>• Appropriateness. |
| | | 2.4 | Explain how to adapt communication to suit different audiences and situations. |
| | | 2.5 | Identify common barriers to effective communication and ways to overcome them. |
| | | 2.6 | Define the term 'active listening' and explain why it is important in the workplace. |

| 3 | Understand the importance of communication within the office environment. | 3.1 | Explain how effective communication contributes to teamwork and collaboration. |
| | | 3.2 | Describe the impact of poor communication on workplace relationships and productivity. |
| | | 3.3 | Define the term 'non-verbal communication'. |
| | | 3.4 | Explain why non-verbal communication is important in the workplace. |
| | | 3.5 | Explain the importance of confidentiality and data protection in workplace communication. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Office Software – Fundamental Skills | Level: | 2 |
|---|---|---|---|
| Unit Number: | F/651/4931 | TQT: | 70 | GLH: | 35 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Use email software effectively. | 1.1 | Identify key features and functions of email software. |
| | | 1.2 | Compose and send professional emails, including subject lines and appropriate formatting. |
| | | 1.3 | Attach files to an email. |
| | | 1.4 | Use CC and BCC when composing an email. |
| | | 1.5 | Organise and manage emails using folders, labels, and filters. |
| | | 1.6 | Explain email security best practices, including recognising phishing emails. |
| 2 | Use word processing software to create and edit documents. | 2.1 | Identify key features and functions of word processing software. |
| | | 2.2 | Create, format, and save documents using appropriate fonts, spacing, and styles. |
| | | 2.3 | Use editing tools such as spell check, grammar check, and find-and-replace. |
| | | 2.4 | Insert and format tables, images, and other elements in a document. |
| | | 2.5 | Use basic document templates for common business documents. |
| | | 2.6 | Save and export documents in different formats. |
| 3 | Use spreadsheet software for basic data management. | 3.1 | Identify key features and functions of spreadsheet software. |
| | | 3.2 | Create and format a simple spreadsheet, including rows, columns, and cell formatting. |
| | | 3.3 | Enter, edit, and sort data within a spreadsheet. |

| 3 | Continued | 3.4 | Use basic formulas and functions. |
| | | 3.5 | Create and format basic charts or graphs to visually represent data. |
| | | 3.6 | Save and export spreadsheets in different formats. |

## Additional Assessment Information

This unit is **competency based.** The evidence for this unit is expected to take the form of products or documents produced by the candidate and assessed by the assessor. Evidence must include an assessor's report.

Centres are expected to have methods in place to verify that the product or document has been produced by the candidate alone, such as:

- The use of photographic evidence.
- The use of secure digital learning platforms.
- The use of supervision and invigilation.

This list is indicative and not exhaustive.

Products or documents may be produced by the candidate as part of their real work, or may be produced in response to a simulated scenario given to them by the centre.

Assessors may wish use to use a checklist or evidence matrix to organise and track the assessment criteria that have been achieved, but these **do not,** in themselves, constitute evidence of achievement.

| Title: | Principles and Practice of Business Administration | Level: | 2 |
|---|---|---|---|
| Unit Number: | M/651/4936 | **TQT:** 40 | **GLH:** 15 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand the role of business administration in the workplace. | 1.1 | Describe what is meant by 'business administration'. |
| | | 1.2 | Explain why effective administration is important for a business. |
| | | 1.3 | Identify common administrative tasks and responsibilities. |
| 2 | Understand the importance of customer service in business administration. | 2.1 | Define 'customer service'. |
| | | 2.2 | Explain the role of customer service in business administration. |
| | | 2.3 | Describe how administrative staff contribute to a positive customer experience. |
| | | 2.4 | Identify common customer service challenges in an office environment and ways to address them. |
| | | 2.5 | Explain the importance of handling telephone calls and enquiries professionally. |
| 3 | Understand basic principles of data handling in a business environment. | 3.1 | Explain the role of data handling in business administration. |
| | | 3.2 | Identify different types of data commonly used in administrative tasks. |
| | | 3.3 | Explain best practices for ensuring data accuracy and minimising errors. |
| | | 3.4 | Describe how to securely store, retrieve, and update business data. |
| | | 3.5 | Identity the potential consequence of poor data management. |

| 4 | Understand confidentiality and data protection requirements in business administration. | 4.1 | Explain the importance of confidentiality in the workplace. |
|---|---|---|---|
| | | 4.2 | Identify key legislation and regulations relating to data protection. |
| | | 4.3 | Describe methods for maintaining confidentiality when working with business information. |
| | | 4.4 | Describe how to report near and actual breaches of confidentiality. |
| | | 4.5 | Identify the potential consequences of data or confidentiality breaches. |
| 5 | Understand the principles of scheduling and diary management. | 5.1 | Explain the importance of scheduling and diary management in business administration. |
| | | 5.2 | Identify different types of scheduling tools and software used in office environments. |
| | | 5.3 | Describe the importance of accuracy and attention to detail in diary management. |
| | | 5.4 | Identify common challenges in scheduling and how to overcome them. |
| | | 5.5 | Explain the importance of maintaining flexibility whilst managing schedules. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Principles and Practice of Reception Duties | Level: | 2 |
|---|---|---|---|
| Unit Number: | R/651/4937 | TQT: | 70 | GLH: | 30 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand the role and responsibilities of a receptionist. | 1.1 | Explain the purpose and value of the receptionist function as the first point of contact between the public, clients, and the organisation. |
| | | 1.2 | Describe how professional behaviour and appearance help create a positive impression of yourself and the organisation. |
| | | 1.3 | Explain how a receptionist contributes to overall customer service and client satisfaction. |
| 2 | Understand confidentiality and security procedures in a reception environment. | 2.1 | Explain the purpose of confidentiality guidelines in a reception role. |
| | | 2.2 | Explain the purpose of entry and security procedures in a reception environment. |
| | | 2.3 | Identify common security risks in a reception environment and explain how to respond to them. |
| 3 | Understand health and safety procedures relevant to a reception environment. | 3.1 | Explain the purpose of health and safety procedures in a reception area. |
| | | 3.2 | Describe how to implement basic health and safety procedures, including keeping the reception area free from hazards. |
| | | 3.3 | Describe common emergency procedures and the receptionist's role within them. |
| | | 3.4 | Describe how to assist visitors and staff in the event of an emergency or evacuation. |

| 4 | Understand how to maintain and improve the reception area. | 4.1 | Explain the importance of keeping the reception area accessible, functional, and welcoming. |
| | | 4.2 | Describe how to contribute ideas for improving the reception environment and services. |
| | | 4.3 | Explain the importance of keeping reception resources up to date and well-presented. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

# ProQual Level 2 Certificate/Diploma in Business Skills

| Title: | Supporting Work Practices in a Business Environment | Level: | 2 |
|---|---|---|---|
| Unit Number: | L/651/4944 | TQT: 80 | GLH: 55 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand how to support an organisation's purpose and values. | 1.1 | Identify an organisation's mission, values and goals. |
| | | 1.2 | Identify a team's objectives, in relation to organisational goals. |
| | | 1.3 | Describe what a job role is responsible for, and what decisions or actions the person is allowed to make. |
| | | 1.4 | Describe how an organisation works with external organisations and stakeholders. |
| | | 1.5 | Identify ways to improve how work is done, in line with an organisation's goals. |
| 2 | Understand how to assess and manage risks in the workplace. | 2.1 | Identify potential risks within the work of a given job role. |
| | | 2.2 | Produce a simple risk assessment for the work undertaken by a given job role, including methods of monitoring and mitigating risks. |
| | | 2.3 | Explain the importance of reviewing and evaluating how to identify risks. |
| 3 | Understand how to maintain security and confidentiality in the workplace. | 3.1 | Describe the purpose of maintaining security and confidentiality. |
| | | 3.2 | Identify current legislation relating to:<br><br>• Data protection.<br>• Use of technologies. |
| | | 3.3 | Describe an organisation's procedures relating to:<br><br>• Data protection.<br>• Use of technologies. |

| 3 | *Continued* | 3.4 | Describe how to report concerns about security or confidentiality to the right person. |
|---|---|---|---|
| 4 | Understand how to support diversity in the workplace. | 4.1 | Describe what is meant by 'diversity'. |
| | | 4.2 | Explain why diversity should be valued in the workplace. |
| | | 4.3 | Identify how supporting diversity can provide advantages to an organisation. |
| | | 4.4 | Identify how a working environment can promote diversity. |
| | | 4.5 | Describe how learning from colleagues with different backgrounds and experiences can improve how you work and communicate. |
| | | 4.6 | Identify how to interact respectfully with colleagues, taking into account: <br> • Background. <br> • Abilities. <br> • Values. <br> • Customs. <br> • Beliefs. |
| | | 4.7 | Identify relevant organisational policies that relate to diversity and inclusion. |
| | | 4.8 | Identify relevant legislation that relates to diversity and inclusion. |
| 5 | Understand how to support sustainability in the workplace. | 5.1 | Define the term 'sustainability'. |
| | | 5.2 | Identify how technology can help make workplaces more sustainable. |
| | | 5.3 | Describe ways that sustainability can be taken into account when choosing suppliers and engaging with stakeholders. |
| | | 5.4 | Identify the main causes of waste within a business administration environment. |
| | | 5.5 | Identify legislative requirements for recycling and disposal of waste. |
| | | 5.6 | Describe organisation procedures for recycling and disposal of waste. |
| | | 5.7 | Explain how looking after equipment helps reduce waste or unnecessary replacements. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

This unit asks candidates to put their knowledge within the context of an organisation. This may be their current employer, an organisation they volunteer with, an organisation they know well, or a fictional organisation provided to them via a case study or simulated assignment. Where a fictional organisation is used for context, this should be provided by the centre and not generated by the candidate.

| Title: | Principles of Document Design and Production | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | Y/651/4948 | TQT: | 100 | GLH: | 70 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles of document design and production. | 1.1 | Explain why it is important that an organisation's documents are:<br>• Professional.<br>• Consistent in design. |
| | | 1.2 | Identify the types of internal and external documents an organisation may produce. |
| | | 1.3 | Identify the different formats in which organisational documents can be presented. |
| | | 1.4 | Identify the different types of technology available for inputting, formatting and editing documents. |
| | | 1.5 | Describe how to check documents for accuracy, including spelling and grammar. |
| | | 1.6 | Identify the benefits of using templates to produce organisational documents. |
| | | 1.7 | Explain how to how to save and store documents safely and securely. |
| | | 1.8 | Explain the importance of version control. |
| | | 1.9 | Identify ways of implementing version control. |
| | | 1.10 | Explain why it is important to review and update the documents on a regular basis. |
| 2 | Design and produce documents in line with organisational style. | 2.1 | Prepare written content for an organisational document. |
| | | 2.2 | Use appropriate software/technology to prepare an organisational document. |
| | | 2.3 | Draft documents in accordance with agreed specifications and format. |
| | | 2.4 | Review drafts and incorporate review comments. |

| 2 | *Continued* | 2.5 | Integrate non-text objects into organisational documents. |
|---|---|---|---|
| | | 2.6 | Save and store documents safely and securely in relevant locations. |
| | | 2.7 | Use relevant methods for documents' version control. |

## Additional Assessment Information

Learning Outcome 1 is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Learning Outcome 2 is **competency based.** The evidence for this unit is expected to take the form of products or documents produced by the candidate and assessed by the assessor. Evidence must include an assessor's report.

Centres are expected to have methods in place to verify that the product or document has been produced by the candidate alone, such as:

- The use of photographic evidence.
- The use of secure digital learning platforms.
- The use of supervision and invigilation.

This list is indicative and not exhaustive. Centres may use the appropriate ProQual assessment material or their own, centre devised, assignments.

Products or documents may be produced by the candidate as part of their real work, or may be produced in response to a simulated scenario given to them by the centre.

Assessors may wish use to use a checklist or evidence matrix to organise and track the assessment criteria that have been achieved, but these **do not,** in themselves, constitute evidence of achievement.

| Title: | Information Management for Business | Level: | 2 |
|---|---|---|---|
| Unit Number: | A/651/4949 | TQT: 100 | GLH: 80 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand how to obtain, use and store information. | 1.1 | Explain why it is important to be clear about the information you need to obtain, before you obtain it. |
| | | 1.2 | Identify common sources of information for businesses. |
| | | 1.3 | Explain why it is important to maintain a record of sources of information. |
| | | 1.4 | Identify common manual and electronic systems used to store information. |
| | | 1.5 | Describe how to organise and record information in a way that is useful to yourself and others. |
| | | 1.6 | Explain why information should be stored in a way that will help you and others find it in the future. |
| | | 1.7 | Identify legislation relevant to the storing of information. |
| | | 1.8 | Explain why it is important to store information securely, including:<br><br>• What is meant by confidential information.<br>• How confidential information should be stored.<br>• Potential consequences of failing to secure confidential information. |
| 2 | Understand how to present information. | 2.1 | Explain why it is important to take the following factors into account when presenting information in the workplace:<br><br>• The intended audience.<br>• Timings.<br>• Expected style, including organisational house style. |
| | | 2.2 | Identify the different formats in which information may be required to be presented. |

| 2 | *Continued* | 2.3 | Explain why it is important to meet agreed timescales when using and presenting information in the workplace, including potential consequences of not meeting deadlines. |
|---|---|---|---|
| | | 2.4 | Describe how to identify and emphasise the key points in the information you are presenting and why this is important. |
| | | 2.5 | Describe how to deal with questions and suggestions effectively and why this is important. |
| 3 | Obtain, use and store information. | 3.1 | Locate information efficiently. |
| | | 3.2 | Explore relevant information and extract the parts you require. |
| | | 3.3 | Organise and record the information in a way that will be useful to yourself and others. |
| | | 3.4 | Record the sources of information. |
| | | 3.5 | Store the information in a way that will help you and others retrieve it in the future. |
| 4 | Present information effectively. | 4.1 | Identify the following factors regarding information to be presented:<br><br>• The intended audience.<br>• Timings.<br>• Expected style. |
| | | 4.2 | Analyse and present information clearly and logically, considering:<br><br>• The intended audience.<br>• Timings.<br>• Expected style. |
| | | 4.3 | Highlight key points in information to be presented. |

## Additional Assessment Information

Learning Outcomes 1and 2 are **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Learning Outcomes 3 and 4 are **competency based.** The evidence for this unit is expected to take the form of products or documents produced by the candidate and assessed by the assessor. Evidence must include an assessor's report.

Centres are expected to have methods in place to verify that the product or document has been produced by the candidate alone, such as:

- The use of photographic evidence.
- The use of secure digital learning platforms.
- The use of supervision and invigilation.

This list is indicative and not exhaustive. Centres may use the appropriate ProQual assessment material or their own, centre devised, assignments.

Products or documents may be produced by the candidate as part of their real work, or may be produced in response to a simulated scenario given to them by the centre.

Assessors may wish use to use a checklist or evidence matrix to organise and track the assessment criteria that have been achieved, but these **do not,** in themselves, constitute evidence of achievement.

| Title: | Processing Customer Information | Level: | 2 |
|---|---|---|---|
| Unit Number: | H/651/4950 | TQT: | 80 | GLH: | 50 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles of processing customer information. | 1.1 | Explain the purpose of processing customer information in a business environment. |
| | | 1.2 | Identify the types of customer information that should and should not be kept on record. |
| | | 1.3 | Describe how processing customer information correctly contributes to customer service. |
| | | 1.4 | Explain the importance of attention to detail when handling customer data. |
| | | 1.5 | Describe the quality checks that should be carried out when processing customer information. |
| | | 1.6 | Identify the legal, organisational, and ethical guidelines that apply to processing customer data, including data protection legislation. |
| 2 | Understand organisational procedures for managing customer information. | 2.1 | Describe the organisation's procedures and guidelines for collecting, retrieving, and supplying customer information. |
| | | 2.2 | Explain how to use the organisation's system for storing customer information. |
| | | 2.3 | Explain how information should be managed, updated, and removed from organisational records when required. |
| | | 2.4 | Describe the steps to take if errors occur in customer data. |
| | | 2.5 | Explain what to do in the event of a data breach and the procedures for reporting it. |
| | | 2.6 | Identify the colleagues involved in data processing and explain their roles and responsibilities. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Promoting Equality and Diversity | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | J/651/4951 | TQT: 80 | GLH: | 70 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles of equality and diversity in the workplace. | 1.1 | Define the following terms:<br><br>• Equality.<br>• Diversity.<br>• Inclusion. |
| | | 1.2 | Explain the benefits of promoting equality and diversity in the workplace. |
| | | 1.3 | Identify key legislation and codes of practice relating to equality and diversity. |
| | | 1.4 | Describe how organisational policies and procedures support equality and diversity. |
| | | 1.5 | Explain the potential impact of discrimination, harassment, and bias on:<br><br>• The victim.<br>• The perpetrator.<br>• The wider team.<br>• The organisation. |
| 2 | Understand the responsibilities of a team leader or manager in promoting equality and diversity. | 2.1 | Explain the role of a team leader or manager in upholding equality and diversity in the workplace. |
| | | 2.2 | Identify ways to ensure fair treatment and equal opportunities for all team members. |
| | | 2.3 | Describe how to respond to inappropriate behaviour or bias in a respectful and effective way. |
| | | 2.4 | Explain the importance of leading by example in promoting an inclusive culture. |
| | | 2.5 | Identify sources of support and guidance for handling equality and diversity issues. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Principles of Team Leadership | | Level: | 2 | |
|---|---|---|---|---|---|
| Unit Number: | K/651/4952 | TQT: | 70 | GLH: | 50 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand the role and responsibilities of a team leader. | 1.1 | Define the role of a team leader and how it differs from that of an individual contributor. |
| | | 1.2 | Identify key responsibilities of a team leader. |
| | | 1.3 | Explain the importance of accountability and decision-making in a leadership role. |
| | | 1.4 | Describe the impact of leadership on team performance and morale. |
| | | 1.5 | Explain the relationship between a team leader and their manager, and how to align team goals with organisational objectives. |
| | | 1.6 | Identify key challenges faced by new team leaders and strategies to overcome them. |
| 2 | Understand leadership styles and their impact on teams. | 2.1 | Describe different leadership styles and their characteristics, including: <br>• Autocratic. <br>• Democratic. <br>• Transformational. |
| | | 2.2 | Explain how different leadership styles can impact team performance, motivation, and engagement. |
| | | 2.3 | Identify the benefits of adapting leadership styles to different team situations and individuals. |
| | | 2.4 | Explain the importance of leading by example and demonstrating professional behaviour. |

| 3 | Understand how to communicate effectively as a team leader. | 3.1 | Explain the importance of clear and open communication in leadership. |
|---|---|---|---|
| | | 3.2 | Identify different methods of communication and when to use them. |
| | | 3.3 | Describe techniques for active listening and ensuring team members feel heard and valued. |
| | | 3.4 | Explain how to provide constructive feedback to improve individual and team performance. |
| | | 3.5 | Identify common communication barriers and strategies for overcoming them. |
| | | 3.6 | Explain the role of meetings and one-to-one discussions in effective team leadership. |
| 4 | Understand how to support and develop a team. | 4.1 | Explain the importance of setting clear team objectives and expectations. |
| | | 4.2 | Describe methods for recognising and developing individual team members' strengths. |
| | | 4.3 | Identify techniques for motivating a team and fostering a positive work environment. |
| | | 4.4 | Explain the importance of delegation and how to delegate tasks effectively. |
| | | 4.5 | Describe how to monitor team performance and provide appropriate support. |
| | | 4.6 | Explain how to handle conflict and resolve issues within a team. |

| 5 | Understand how to manage time, workload, and priorities as a team leader. | 5.1 | Explain the importance of time management in a leadership role. |
|---|---|---|---|
| | | 5.2 | Identify methods for prioritising tasks and managing workload effectively. |
| | | 5.3 | Describe techniques for managing competing demands and delegating tasks appropriately. |
| | | 5.4 | Explain the importance of maintaining personal resilience and handling stress. |
| | | 5.5 | Identify tools and techniques for planning and organising work for a team. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Developing and Delivering Presentations | Level: | 2 | | |
|---|---|---|---|---|---|
| Unit Number: | L/651/4953 | TQT: | 100 | GLH: | 50 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand how to develop a presentation. | 1.1 | Identify the advantages and disadvantages of using presentations to provide information. |
| | | 1.2 | Identify ways to develop presentations that are:<br>• Engaging.<br>• Interesting.<br>• Relevant.<br>• Informative. |
| | | 1.3 | Describe how to tailor a presentation to an audience to meet their individual and group needs. |
| | | 1.4 | Explain how handouts and supporting materials can be used to complement presentations. |
| | | 1.5 | Explain why it is important to rehearse a presentation. |
| 2 | Understand how to deliver a presentation. | 2.1 | Describe the impact that the following factors can have on a presentation:<br>• Language.<br>• Body language.<br>• Voice tone.<br>• Volume.<br>• Pace. |
| | | 2.2 | Identify the types of equipment used in presentations and their features. |
| | | 2.3 | Describe how to gauge audience reactions to a presentation. |
| | | 2.4 | Explain why it is important to respond effectively to audience questions and the impact this has. |
| | | 2.5 | Identify ways to collect audience feedback after a presentation. |

| 3 | Develop and deliver a presentation. | 3.1 | Prepare a presentation that meets defined objectives and needs of the audience. |
|---|---|---|---|
| | | 3.2 | Produce presentation handouts and supporting materials. |
| | | 3.3 | Develop a contingency plan in case of equipment failure or other problems. |
| | | 3.4 | Introduce yourself to the audience and state the aims of the presentation. |
| | | 3.5 | Speak clearly and confidently, using language which is appropriate to the topic and the audience. |
| | | 3.6 | Use the relevant equipment or tools to run the presentation. |
| | | 3.7 | Vary voice tone, pace and volume to emphasise key points and maintain the audience's interest. |
| | | 3.8 | Use body language in a way that reinforces your message. |
| | | 3.9 | Summarise the key points following your presentation. |
| | | 3.10 | Provide an opportunity for the audience to ask questions. |
| | | 3.11 | Collect feedback on the presentation. |
| | | 3.12 | Evaluate and reflect on the presentation, including:<br><br>• Areas of strength.<br>• Areas for improvement.<br>• How improvements will be implemented next time. |

## Additional Assessment Information

Learning Outcomes 1 and 2 are **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Learning Outcome 3 is **competency based.** The evidence for this unit is expected to take the form of a presentation developed and delivered by the candidate, alongside supporting information and documentation.

The presentation may be delivered by the candidate as part of their real work, or may be developed and delivered in response to a simulated scenario or case study supplied by the assessor.

ProQual does not place restrictions on the topic of the presentation, but centres should consider the context of the unit within the wider qualification. For example, if this unit is being delivered within a marketing qualification or pathway, candidates should deliver a qualification within a marketing context.

Products or documents may be produced by the candidate as part of their real work, or may be produced in response to a simulated scenario given to them by the centre.

Assessors may wish use to use a checklist or evidence matrix to organise and track the assessment criteria that have been achieved, but these **do not,** in themselves, constitute evidence of achievement.

| Title: | Monitoring and Developing Employees | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | R/651/4955 | TQT: 120 | GLH: | 80 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand how to monitor employee performance. | 1.1 | Explain how to plan and allocate work, taking health and safety into account. |
| | | 1.2 | Describe the importance of briefing staff on allocated work. |
| | | 1.3 | Identify different types of performance targets, including Key Performance Indicators (KPIs), productivity, quality standards, and customer responses. |
| | | 1.4 | Explain why it is important to set targets against specific standards or KPIs. |
| | | 1.5 | Describe methods for setting performance targets. |
| | | 1.6 | Explain how to assess the progress and quality of work. |
| | | 1.7 | Describe methods for observing, discussing, and gathering feedback on employee performance. |
| 2 | Understand how to provide feedback and manage poor performance. | 2.1 | Explain how to provide constructive feedback to improve performance. |
| | | 2.2 | Describe methods for encouraging employees to ask questions, seek clarification, and express concerns. |
| | | 2.3 | Explain why it is important to identify and address unsatisfactory or poor performance. |
| | | 2.4 | Describe how to discuss the causes of poor performance and agree on ways to improve. |
| | | 2.5 | Explain how to agree and follow up on an action plan with employees to address performance issues. |

| 2 | Continued | 2.6 | Identify common workplace problems or unexpected events and describe how to support employees in managing them. |
| | | 2.7 | Explain how to log and store information on employee performance while respecting confidentiality. |
| 3 | Understand legal and ethical considerations in monitoring employee performance. | 3.1 | Identify key legislation, regulations, guidelines, and codes of practice relating to employee performance monitoring. |
| | | 3.2 | Explain how to ensure compliance with confidentiality and data protection regulations when recording and storing employee performance information. |
| | | 3.3 | Describe the boundaries of dealing with individual staff problems and when to involve external support services. |
| | | 3.4 | Explain how to motivate employees by recognising and rewarding success. |
| 4 | Understand how to identify and plan employee development. | 4.1 | Explain the types of information used to assess employees' development needs, including appraisals, performance reviews, business plans, and stakeholder feedback. |
| | | 4.2 | Describe how to identify the skills employees need to develop. |
| | | 4.3 | Explain how to set and agree on individual development targets. |
| | | 4.4 | Describe how to write an action plan and agree on learning goals with employees. |
| 5 | Understand how to support and evaluate employee learning. | 5.1 | Explain how to encourage employees to reflect on their achievements. |
| | | 5.2 | Describe common obstacles to learning and strategies to overcome them. |
| | | 5.3 | Explain how to analyse and use developments in learning, including online and technology-based training. |

| 6 | Understand legal and ethical considerations in employee development. | 6.1 | Identify key laws, regulations, and best practices related to employee development and training. |
| | | 6.2 | Describe how to ensure fair access to development opportunities for all employees. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Managing Team Communications | Level: | 2 |
|---|---|---|---|
| Unit Number: | T/651/4956 | TQT: | 100 | GLH: | 70 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles and methods of effective communication. | 1.1 | Identify the principles of effective communication and how they apply in a team setting. |
| | | 1.2 | Identify different methods of communication and their advantages and limitations. |
| | | 1.3 | Describe the features, benefits, and challenges of different communication media, including:<br><br>• Face-to-face.<br>• Written.<br>• Telephone.<br>• Email. |
| | | 1.4 | Explain how to adapt communication style and method to suit different situations and audiences. |
| | | 1.5 | Explain the importance of active listening and how to demonstrate it in team interactions. |
| | | 1.6 | Describe the impact of poor communication on team performance and morale. |
| 2 | Understand the role of technology in team communication. | 2.1 | Identify common technologies used to support team communication. |
| | | 2.2 | Describe how to use different communication technologies effectively to enhance collaboration. |
| | | 2.3 | Explain the benefits and challenges of remote and virtual team communication. |
| | | 2.4 | Describe techniques for managing information resources for remote and virtual teams. |

| 3 | Understand how to manage communication within and between teams. | 3.1 | Explain how to identify and assess team communication needs, both individually and collectively. |
| | | 3.2 | Describe the importance of discussing and agreeing on communication methods with team members and other internal and external teams. |
| | | 3.3 | Describe best practices for ensuring team members have opportunities to discuss their work and any issues arising. |
| | | 3.4 | Explain the importance of providing and receiving information at the right time and the consequences of communication breakdowns. |
| | | 3.5 | Identify strategies for handling urgent or exceptional communication circumstances. |
| 4 | Understand the organisational context of team communication. | 4.1 | Identify the internal and external teams that employees communicate with and how information is shared between them. |
| | | 4.2 | Explain how organisational policies and reporting requirements affect team communication. |
| | | 4.3 | Describe how working practices, including remote and flexible working, impact team communication. |
| | | 4.4 | Describe the communication technologies and resources available within the organisation and their benefits and challenges. |
| | | 4.5 | Identify key employees responsible for specific types of communication and their roles. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

**Learning Outcome 4** asks candidates to put their knowledge within the context of an organisation. This may be their current employer, an organisation they volunteer with, an organisation they know well, or a fictional organisation provided to them via a case study or simulated assignment. Where a fictional organisation is used for context, this should be provided by the centre and not generated by the candidate.

| Title: | Promoting Team Wellbeing | Level: | 2 |
|---|---|---|---|
| Unit Number: | Y/651/4984 | TQT: | 90 | GLH: | 70 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles and importance of promoting team wellbeing. | 1.1 | Explain how effective leadership contributes to a positive working environment and team wellbeing. |
| | | 1.2 | Explain the importance of promoting team wellbeing. |
| | | 1.3 | Identify the potential consequences of poor team wellbeing. |
| | | 1.4 | Explain the importance of providing staff with opportunities to discuss issues affecting their wellbeing. |
| 2 | Understand how to assess and monitor team wellbeing. | 2.1 | Identify types of quantitative data that can be used to evaluate staff wellbeing. |
| | | 2.2 | Identify qualitative information sources that can be used to evaluate staff wellbeing. |
| | | 2.3 | Describe how to recognise signs that staff may be experiencing wellbeing-related issues. |
| | | 2.4 | Describe how to create an open and supportive culture where employees feel comfortable discussing wellbeing concerns. |
| | | 2.5 | Describe the importance of confidentiality when handling wellbeing-related discussions and data. |
| 3 | Understand strategies to support and improve team wellbeing. | 3.1 | Identify common workplace stressors and their impact on employee wellbeing. |
| | | 3.2 | Identify initiatives that can be implemented to reduce stress and enhance staff wellbeing. |
| | | 3.3 | Identify strategies for creating a positive team culture. |
| | | 3.4 | Identify actions that can be taken to alleviate individual or team wellbeing issues when they arise. |
| | | 3.5 | Describe how to encourage a healthy work-life balance within the team. |

| 4 | Understand how to apply team wellbeing principles in a workplace context. | 4.1 | Identify the data available within an organisation that can inform an assessment of staff wellbeing. |
| | | 4.2 | Identify individuals within an organisation and their roles and responsibilities in supporting team wellbeing. |
| | | 4.3 | Describe internal and external sources of specialist expertise available to support employee wellbeing, such as HR staff, mental health first aiders, employee assistance programmes, charities, and local support groups. |
| | | 4.4 | Explain how to access and use external resources to enhance staff wellbeing initiatives within the organisation. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

**Learning Outcome 4** asks candidates to put their knowledge within the context of an organisation. This may be their current employer, an organisation they volunteer with, an organisation they know well, or a fictional organisation provided to them via a case study or simulated assignment. Where a fictional organisation is used for context, this should be provided by the centre and not generated by the candidate.

| Title: | Leading Meetings in a Business Setting | Level: | 2 | | |
|---|---|---|---|---|---|
| Unit Number: | A/651/4985 | TQT: | 80 | GLH: | 50 |

| Learning Outcomes The learner will be able to: | | Assessment Criteria The learner can: | |
|---|---|---|---|
| 1 | Understand the different types and purposes of meetings. | 1.1 | Identify the different types of meetings and their main purposes and objectives. |
| | | 1.2 | Explain how to plan meetings to ensure they meet agreed aims and objectives. |
| | | 1.3 | Explain the purpose of agreeing agenda items and allocating time for each item. |
| | | 1.4 | Identify the types of information that attendees require before, during, and after meetings. |
| | | 1.5 | Identify the common documents used in meetings, including agendas, minutes, matters arising, and action sheets. |
| 2 | Understand how to organise meetings effectively. | 2.1 | Describe how to identify suitable venues or software for different types of meetings. |
| | | 2.2 | Explain the types of resources, including technology, needed for different types of meetings. |
| | | 2.3 | Explain the importance of testing meeting software and equipment before the meeting. |
| | | 2.4 | Describe the health, safety, and security requirements when organising meetings. |
| | | 2.5 | Identify potential special requirements that attendees may have and how to accommodate them. |
| | | 2.6 | Explain the main points that should be covered by an agenda and meeting papers. |

| 3 | Understand how to conduct and manage meetings. | 3.1 | Explain the purpose of approving records of previous meetings, where applicable. |
|---|---|---|---|
| | | 3.2 | Describe methods to facilitate discussions so that the purpose of each agenda item is achieved. |
| | | 3.3 | Explain how to take notes effectively during discussions. |
| | | 3.4 | Explain how to summarise discussions and agree on actions at appropriate points during the meeting. |
| | | 3.5 | Identify common problems, including conflict, that may arise during meetings and strategies for resolving them. |
| 4 | Understand post-meeting actions and evaluation. | 4.1 | Explain how to record and follow up on agreed actions from meetings. |
| | | 4.2 | Explain why it is important to follow organisational procedures for clearing and vacating a meeting room. |
| | | 4.3 | Identify different methods for collecting and evaluating participant feedback from a meeting. |
| | | 4.4 | Explain how to agree on learning points to improve the organisation of future meetings. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Managing Conflicts in the Work Environment | Level: | 2 |
|---|---|---|---|
| Unit Number: | D/651/4986 | TQT: 120 | GLH: 100 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand how to identify issues that may cause conflict in the workplace. | 1.1 | Identify potential causes of conflict within:<br><br>• Organisational structures.<br>• Workplace systems.<br>• Workplace procedures.<br>• Digital communication, such as virtual meetings, emails and messaging apps. |
| | | 1.2 | Explain how team member's backgrounds may create differences in expectations. |
| | | 1.3 | Explain the importance of identifying potential conflicts across an organisation and describe preventative actions to avoid these. |
| | | 1.4 | Explain how and why conflict happens in the broader work environment, including conflicts between:<br><br>• Team members.<br>• Different stakeholders.<br>• Levels of management.<br>• Departments.<br>• Organisations. |
| 2 | Understand how to deal with conflict in the workplace. | 2.1 | Describe how differences in team member's expectations can be managed. |
| | | 2.2 | Identify ways to deal with workplace conflicts when they arise, including what types of action should be taken and when. |
| | | 2.3 | Explain the process and principles of mediation in resolving work conflicts. |
| | | 2.4 | Describe different conflict resolution techniques and how to apply them in different situations. |
| | | 2.5 | Describe the importance of identifying and agreeing on conflict resolution strategies with team members without apportioning blame. |

| 3 | Understand when and how to seek additional support for conflict resolution. | 3.1 | Identify when and how to seek help from colleagues or specialists in managing workplace conflict. |
|---|---|---|---|
| | | 3.2 | Describe the sources of specialist or third-party support available within an organisation to manage conflicts. |
| 4 | Understand conflict resolution within an organisational context. | 4.1 | Describe how organisational culture, rank, and role hierarchies affect workplace interactions and potential conflicts. |
| | | 4.2 | Identify organisational structures, systems, and procedures that may contribute to conflict. |
| | | 4.3 | Describe the organisational and legal requirements for resolving conflicts and maintaining records of conflict resolution outcomes. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

**Learning Outcome 4** asks candidates to put their knowledge within the context of an organisation. This may be their current employer, an organisation they volunteer with, an organisation they know well, or a fictional organisation provided to them via a case study or simulated assignment. Where a fictional organisation is used for context, this should be provided by the centre and not generated by the candidate.

| Title: | Winning and Retaining Customers | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | T/651/4992 | TQT: | 100 | GLH: | 80 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand the market and customer needs. | 1.1 | Describe how to identify the position of a business within the market. |
| | | 1.2 | Identify the types of customer information that can be used to tailor products and services effectively. |
| | | 1.3 | Explain how to segment customers based on their needs and value to the business. |
| | | 1.4 | Identify key information a business should know about its competitors. |
| | | 1.5 | Identify effective ways to communicate information to current and potential customers. |
| 2 | Understand how business infrastructure supports customer engagement. | 2.1 | Explain the impact of business infrastructure on customer service quality. |
| | | 2.2 | Describe what is meant by customer relationship management. |
| | | 2.3 | Identify technology used to: <br> • Manage communication with customers. <br> • Manage customer billing. <br> • Facilitate customer relationship management. |
| 3 | Understand how customer feedback and experience contribute to retention. | 3.1 | Explain how to build relationships with customers. |
| | | 3.2 | Identify methods to enhance customer experience when interacting with a business. |
| | | 3.3 | Describe a range of services, benefits, and rewards that encourage customer loyalty. |
| | | 3.4 | Identify the different types of customer feedback. |
| | | 3.5 | Describe methods for gathering customer feedback. |

| 3 | *Continued* | 3.6 | Explain the importance of taking action based on customer feedback. |
|---|---|---|---|
| | | 3.7 | Identify strategies to improve customer retention and satisfaction. |
| | | 3.8 | Explain the importance of regularly reviewing products and services. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Social Media for Business | Level: | 2 |
|---|---|---|---|
| Unit Number: | Y/651/4993 | TQT: | 80 | GLH: | 70 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the use of social media in business marketing. | 1.1 | Define the term 'social media'. |
| | | 1.2 | Identify the benefits of using social media for business marketing. |
| | | 1.3 | Identify the different social media platforms and their key features. |
| | | 1.4 | Compare the advantages and disadvantages of various social media platforms for different business purposes. |
| | | 1.5 | Describe the impact of social media on customer communication and business reputation. |
| | | 1.6 | Describe common risks and challenges associated with using social media for business, including:<br><br>• Data security.<br>• Negative feedback.<br>• Reputational damage.<br>• Misinformation or "fake news" damaging brand trust.<br>• Overreliance on algorithms reducing reach unpredictably. |
| 2 | Understand how to develop a social media strategy for business. | 2.1 | Identify the key components of a social media strategy. |
| | | 2.2 | Identify business goals that can be supported through social media. |
| | | 2.3 | Describe how to define a target audience for social media marketing. |
| | | 2.4 | Explain how to create engaging content. |
| | | 2.5 | Describe different types of social media content, including:<br><br>• Images.<br>• Videos.<br>• Blogs.<br>• Live streams. |

| 2 | *Continued* | 2.6 | Explain how to schedule and plan social media posts for consistency and effectiveness. |
| | | 2.7 | Identify tools and platforms that assist in managing social media campaigns. |
| 3 | Understand how to measure the effectiveness of social media in business. | 3.1 | Describe key performance indicators (KPIs) used to measure social media success, including: <ul><li>Engagement rates.</li><li>Reach.</li><li>Impressions.</li><li>Conversions.</li></ul> |
| | | 3.2 | Explain how to use social media analytics tools to track performance. |
| | | 3.3 | Describe how customer feedback and engagement on social media can be used to improve business strategies. |
| | | 3.4 | Explain how to adjust a social media strategy based on performance data and insights. |
| | | 3.5 | Identify ethical and legal considerations when using social media for business, including: <ul><li>Data protection.</li><li>Copyright.</li><li>Advertising regulations.</li><li>Use of AI-generated content.</li><li>Influencer partnerships and disclosure rules.</li></ul> |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | SEO for Business | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | F/651/4996 | TQT: | 80 | GLH: | 70 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles of SEO, and its role in business. | 1.1 | Define the term 'SEO'. |
| | | 1.2 | Explain the importance of SEO for business. |
| | | 1.3 | Describe how search engines work and how they rank websites. |
| | | 1.4 | Identify the main benefits of effective SEO. |
| | | 1.5 | Explain the challenges and limitations of SEO. |
| | | 1.6 | Explain the key differences between organic search results and paid advertising (PPC). |
| 2 | Understand the key components of SEO. | 2.1 | Explain the importance of keywords in SEO. |
| | | 2.2 | Describe how to conduct keyword research and select relevant keywords for a business. |
| | | 2.3 | Explain the role of on-page SEO, including:<br><br>• Optimised titles and meta descriptions.<br>• Header tags.<br>• Internal linking.<br>• Image optimisation. |
| | | 2.4 | Explain the role of off-page SEO, including:<br><br>• Backlinks and link-building strategies.<br>• Social media signals.<br>• Guest posting and collaborations. |
| | | 2.5 | Describe the importance of technical SEO, including:<br><br>• Website speed and mobile-friendliness.<br>• Secure website protocols (HTTPS).<br>• XML sitemaps and structured data. |
| | | 2.6 | Explain how local SEO helps businesses target local customers and improve visibility in search results. |

| 3 | Understand how to monitor and improve SEO performance. | 3.1 | Describe key SEO performance metrics, including:<br><br>• Organic traffic.<br>• Click-through rates.<br>• Bounce rates.<br>• Domain authority. |
|---|---|---|---|
| | | 3.2 | Describe how to use SEO tools to track website performance. |
| | | 3.3 | Explain how to analyse SEO reports and identify areas for improvement. |
| | | 3.4 | Describe how businesses can adapt their SEO strategies based on performance data. |
| | | 3.5 | Explain ethical SEO practices and the risks of black-hat SEO tactics, including:<br><br>• Keyword stuffing.<br>• Cloaking.<br>• Link farming. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Managing Brand Identity and Reputation | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | J/651/5012 | TQT: | 80 | GLH: | 60 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand methods for promoting brand identity. | 1.1 | Define the term 'brand identity'. |
| | | 1.2 | Explain the role of brand identity in business success. |
| | | 1.3 | Describe the range of methods available to promote brand characteristics. |
| | | 1.4 | Identify the advantages and disadvantages of using the following methods to promote brand characteristics:<br><br>• Advertising.<br>• Sponsorships.<br>• Influencer marketing.<br>• Content marketing.<br>• Social media campaigns.<br>• Short-form video.<br>• Paid digital advertisements. |
| | | 1.5 | Explain how branding principles and methods are used to build and maintain corporate reputation. |
| | | 1.6 | Describe the role of brand identity in marketing organisational products and services. |
| | | 1.7 | Explain the importance of maintaining brand positioning to maximise return on investment (ROI). |
| | | 1.8 | Describe the contents of brand guidelines and their role in protecting the brand. |
| 2 | Understand how to maintain brand consistency and employee engagement. | 2.1 | Explain why staff behaviour needs to align with brand characteristics and values. |
| | | 2.2 | Describe strategies to ensure all employees understand and uphold the brand's identity. |
| | | 2.3 | Explain how internal communication and training can support brand consistency. |

| 2 | *Continued* | 2.4 | Describe how to develop criteria to monitor and evaluate the success of brand identity and reputation. |
|---|---|---|---|
| 3 | Understand how to assess and mitigate risks to brand reputation. | 3.1 | Identify the key risks to a brand and corporate reputation. |
| | | 3.2 | Describe ways to mitigate risks to a brand and corporate reputation and when to use them. |
| | | 3.3 | Identify sources of valid and reliable information on brand perception. |
| | | 3.4 | Describe methods for tracking and assessing brand perception. |
| | | 3.5 | Explain how to assess the validity and reliability of customer perception data. |
| | | 3.6 | Describe the difference between customer demands, expectations, satisfaction, and loyalty. |
| 4 | Understand how to monitor and improve brand identity and reputation. | 4.1 | Describe the methods used to monitor brand success against agreed criteria. |
| | | 4.2 | Explain how brand monitoring outcomes can inform future brand development. |
| | | 4.3 | Identify legal, regulatory, and ethical requirements, as well as codes of practice, related to brand identity and corporate reputation. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Principles and Practice of Email Marketing | Level: | 2 |
|---|---|---|---|
| Unit Number: | J/651/5176 | TQT: | 80 | GLH: | 50 |

| Learning Outcomes _The learner will be able to:_ | | Assessment Criteria _The learner can:_ | |
|---|---|---|---|
| 1 | Understand the principles of email marketing. | 1.1 | Identify different types of email marketing campaigns. |
| | | 1.2 | Describe key elements of an effective marketing email, including: <br>• Subject lines. <br>• Body content. <br>• Call-to-action (CTA). <br>• Visuals. |
| | | 1.3 | Explain the importance of audience segmentation and targeting in email marketing. |
| | | 1.4 | Identify the advantages and disadvantages of email marketing. |
| 2 | Know how to format and structure marketing emails. | 2.1 | Identify best practices for formatting emails for readability and engagement. |
| | | 2.2 | Explain the role of personalisation in email marketing. |
| | | 2.3 | Identify common mistakes in email design and how to avoid them. |
| 3 | Understand the use of email clients and automation tools. | 3.1 | Identify popular email marketing platforms and their key features. |
| | | 3.2 | Describe how to set up and manage email lists using email marketing software. |
| | | 3.3 | Describe the role of automation in email marketing campaigns. |
| | | 3.4 | Explain how to monitor email performance using analytics. |

| 4 | Understand the legal and ethical considerations of email marketing. | 4.1 | Identify the key legal requirements for email marketing, including:<br><br>• GDPR.<br>• Anti-spam regulations.<br>• Advertising regulations |
| | | 4.2 | Identify the rules around cold emailing and obtaining consent. |
| | | 4.3 | Explain how to provide recipients with opt-out/unsubscribe options. |
| 5 | Create an email marketing campaign. | 5.1 | Plan a marketing email campaign, considering target audience, purpose, and message. |
| | | 5.2 | Design and create a marketing email that adheres to best practices. |
| | | 5.3 | Ensure compliance with legal and ethical guidelines in the email content. |
| | | 5.4 | Evaluate the effectiveness of the email, identifying potential improvements. |

## Additional Assessment Information

Learning Outcomes 1, 2, 3 and 4 are **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

Learning Outcome 5 is **competency based.** The evidence for this unit is expected to take the form of the planning for, content of and evaluation of an email marketing campaign. This may be a campaign that the candidate has produced as part of their job role, or it may be a simulated campaign based on a scenario supplied by the centre.

Centres are expected to have methods in place to verify that the product or document has been produced by the candidate alone, such as:

• The use of photographic evidence.
• The use of secure digital learning platforms.
• The use of supervision and invigilation.

This list is indicative and not exhaustive. Centres may use the appropriate ProQual assessment material or their own, centre devised, assignments.

Assessors may wish use to use a checklist or evidence matrix to organise and track the assessment criteria that have been achieved, but these **do not,** in themselves, constitute evidence of achievement.

| Title: | Building and Maintaining Sales Relationships | Level: | 2 |
|---|---|---|---|
| Unit Number: | L/651/5014 | TQT: 100 | GLH: 80 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the legal, ethical and organisational considerations relating to customer relationships. | 1.1 | Identify the current legal, ethical and corporate social responsibility requirements relating to customer relationships. |
| | | 1.2 | Describe quality and compliance considerations related to customer relationships. |
| 2 | Understand customer relationship management methods. | 2.1 | Describe different methods of customer relationship management (CRM) and their benefits. |
| | | 2.2 | Explain how CRM systems and strategies support long-term and profitable relationships. |
| | | 2.3 | Identify common criteria for establishing and maintaining valuable customer relationships. |
| | | 2.4 | Explain how to prioritise customers based on their value and potential to the organisation. |
| | | 2.5 | Outline the content of a customer relationship plan and the key data required to inform it. |
| 3 | Understand strategies for developing and enhancing customer relationships. | 3.1 | Explain how sales strategy, activity plans, sales targets, and objectives shape customer relationships. |
| | | 3.2 | Identify the interpersonal skills needed to build rapport and establish trust with customers. |
| | | 3.3 | Describe how to communicate effectively with key customers to foster commitment and cooperation. |
| | | 3.4 | Explain the risks and potential benefits associated with long-term customer relationships. |
| | | 3.5 | Explain the negotiation techniques used to create mutually beneficial financial outcomes in sales relationships. |

| 4 | Understand how to maintain and maximise sales opportunities in customer relationships. | 4.1 | Define the concepts of up-selling, cross-selling, and selling add-ons, and explain when they should be applied. |
| | | 4.2 | Describe methods for monitoring and evaluating customer relationships. |
| | | 4.3 | Explain how to determine the level of resources required to maintain effective customer relationships. |
| | | 4.4 | Identify techniques to recognise and capitalise on sales opportunities while maintaining customer relationships. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Negotiating and Closing Sales | Level: | 2 |
|---|---|---|---|
| Unit Number: | K/651/5013 | TQT: 100 | GLH: 70 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand sales regulations, market positioning and competitor information. | 1.1 | Identify the current legal, ethical, and regulatory sales requirements related to selling products and services within a given industry or sector. |
| | | 1.2 | Explain the types of competitor information used for key competitor comparisons. |
| | | 1.3 | Describe industry or sector pricing structures and their impact on customer sales objections, within a given industry or sector. |
| | | 1.4 | Outline common organisational procedures for negotiating and handling objections. |
| 2 | Understand negotiation strategies and techniques. | 2.1 | Explain how to define objectives for a negotiation based on:<br><ul><li>An assessment of the customer's negotiating stance.</li><li>The organisation's product and service strengths and weaknesses.</li></ul> |
| | | 2.2 | Identify common and unusual objections and differentiate between sincere and insincere objections. |
| | | 2.3 | Explain how listening skills and summarisation techniques help confirm understanding during negotiations. |
| | | 2.4 | Describe different questioning techniques and how they can be used to close a sale. |
| | | 2.5 | Identify barriers between customers and sales professionals and explain strategies to overcome them. |

| 3 | Understand sales techniques for overcoming objections and closing sales. | 3.1 | Explain the importance of testimonials in overcoming customer objections. |
|---|---|---|---|
| | | 3.2 | Describe how to illustrate the benefits and features of a product or service effectively. |
| | | 3.3 | Explain the concept of 'win-win' situations and how to create them in negotiations. |
| | | 3.4 | Describe how to negotiate a sale close and determine when to say 'no' to a customer. |
| | | 3.5 | Explain the concepts of cross-selling, up-selling, and add-ons, and how they contribute to increased sales value and profitability. |
| | | 3.6 | Describe a range of techniques for closing a sale. |
| | | 3.7 | Differentiate between assertive and aggressive behaviour in sales negotiations. |
| 4 | Understand sales documentation and performance review processes. | 4.1 | Describe common organisational procedures for recording and storing the outcomes of negotiations. |
| | | 4.2 | Describe the importance of reviewing the history of previous sales negotiations to improve future sales performance. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Understanding Sales Tools and Technologies | Level: | 2 | | |
|---|---|---|---|---|---|
| Unit Number: | K/651/5040 | TQT: | 70 | GLH: | 40 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the range and purpose of sales tools and technologies available. | 1.1 | Identify the range of tasks and activities on sales tools and technology systems. |
| | | 1.2 | Identify and describe the purpose of **five** common tools or technologies used in sales environments. |
| | | 1.3 | Describe the benefits of tools and technology systems for sales-related tasks and activities. |
| | | 1.4 | Identify the current legal and ethical issues in relation to the use of sales tools and technology systems. |
| | | 1.5 | Explain the importance of automation of sales-related tasks and activities. |
| | | 1.6 | Describe the sales pipeline and how to feed the leads into it using technology systems. |
| 2 | Understand how to use a given sales tool or technology. | 2.1 | Describe the purpose of a given sales tool or technology. |
| | | 2.2 | Describe the visibility options and ownership of sales team members on a given sales tool or technology. |
| | | 2.3 | Identify the information requirements for the sales function, lead generation and qualification of these for a given sales tool or technology. |
| | | 2.4 | Explain how to collate, qualify and prioritise the leads on a given sales tool or technology. |
| | | 2.5 | Describe how to maintain and monitor your sales pipeline on a given sales tool or technology. |

| 2 | *Continued* | 2.6 | Explain how to use the sales technology system as part of planning and implementation of sales activities for a given sales tool or technology. |
|---|---|---|---|
| | | 2.7 | Describe the support, guidance and skills development available to the users of a given sales tool or technology system. |
| 3 | Use a given sales tool or technology system. | 3.1 | Use sales-related information for planning and implementing sales activities. |
| | | 3.2 | Store information on the sales technology systems, checking its:<br><br>• Quality.<br>• Validity.<br>• Reliability. |
| | | 3.3 | Maintain the sales-related information stored in the technology systems, ensuring it is accurate and up to date. |
| | | 3.4 | Use tools and technology systems for automation of sales-related tasks and activities. |
| | | 3.5 | Share sales-related information for collaboration with other people. |
| | | 3.6 | Use lead generation automation technology to qualify the leads. |
| | | 3.7 | Collate potential leads and prioritise these in accordance with sales targets. |
| | | 3.8 | Summarise information appropriately from sales systems for the purposes of reporting. |
| | | 3.9 | Monitor own use of the sales technology system and identify guidance, support and skills development required. |
| | | 3.10 | Seek evidence-based recommendations for improvement of sales activities and personal productivity using the technology systems. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

**Learning outcomes 2 and 3** ask candidates to apply their knowledge within the context of a given sales tool or technology. This may be a sales tool or technology system that they are currently using as part of their employment, or it may be a sales tool or technology system that is provided by the centre as part of candidate's training. In the latter case, sales information may be simulated as long as:

- The fictional information is provided to the candidate by the centre.
- The sales tool or technology system used is a real tool or technology system in common use.

| Title: | Selling Products and Services Face to Face | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | A/651/5064 | TQT: 100 | GLH: | 80 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the legal, regulatory and ethical considerations for face-to-face sales. | 1.1 | Explain the current legal, regulatory, and ethical constraints that impact face-to-face sales activities. |
| | | 1.2 | Identify the health, safety, and security requirements for various face-to-face sales environments. |
| | | 1.3 | Describe common policies, procedures, and best practices for face-to-face sales. |
| 2 | Understand selling strategies and techniques. | 2.1 | Explain how to develop a sales call plan and other communication methods with customers. |
| | | 2.2 | Compare proactive and reactive selling techniques and their applications. |
| | | 2.3 | Describe techniques for cross-selling, up-selling, and selling add-ons. |
| | | 2.4 | Explain methods for assessing minimum and maximum potential sales returns. |
| | | 2.5 | Describe how to prioritise leads based on their potential value and likelihood of sales closure. |
| | | 2.6 | Identify unique selling points (USPs) and key differentiators and explain how to emphasise them. |
| | | 2.7 | Describe techniques for managing customer objections and resolving concerns during face-to-face sales interactions. |

| 3 | Understand customer buying behaviours and how to close sales. | 3.1 | Describe different customer buying behaviours and strategies for managing them. |
| | | 3.2 | Explain techniques for successfully closing sales at various stages of the sales process. |
| | | 3.3 | Identify the methods and processes for collecting and recording sales leads information. |
| | | 3.4 | Explain how to evaluate and measure the effectiveness of face-to-face sales techniques, approaches, and environments. |
| 4 | Understand organisational sales process and customer engagement strategy. | 4.1 | Explain the organisation's objectives and strategies for customer interactions in face-to-face sales. |
| | | 4.2 | Describe the organisation's range of products, services, and recent market developments. |
| | | 4.3 | Produce a plan for how to structure and progress a sales interaction with a customer. |
| | | 4.4 | Identify relevant sales materials and messaging techniques for engaging customers. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

**Learning Outcome 4** asks candidates to put their knowledge within the context of an organisation. This may be their current employer, an organisation they volunteer with, an organisation they know well, or a fictional organisation provided to them via a case study or simulated assignment. Where a fictional organisation is used for context, this should be provided by the centre and not generated by the candidate.

| Title: | Selling Products and Services Remotely | Level: | 2 | | |
|---|---|---|---|---|---|
| Unit Number: | D/651/5065 | TQT: | 100 | GLH: | 80 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the fundamentals of remote selling. | 1.1 | Explain the differences between inbound and outbound remote selling. |
| | | 1.2 | Describe the current legal, regulatory, and ethical considerations relating to remote sales operations. |
| | | 1.3 | Identify regulatory requirements for processing customer transactions online. |
| 2 | Understand remote selling strategies and techniques. | 2.1 | Explain the sales cycle and how it helps sales teams structure and progress their activities. |
| | | 2.2 | Compare proactive and reactive selling techniques in a remote sales environment. |
| | | 2.3 | Describe techniques for cross-selling, up-selling, and selling add-ons. |
| | | 2.4 | Identify communication channels and technologies used for remote selling. |
| | | 2.5 | Explain the etiquette and best practices for effective communication in remote sales interactions. |
| 3 | Understand customer engagement and sales closure in remote selling. | 3.1 | Explain how to involve customers in the sales process to develop and close a sale. |
| | | 3.2 | Identify techniques for successfully closing sales at different stages of the sales process. |
| | | 3.3 | Describe a range of customer behaviours in remote selling and how to manage them. |
| | | 3.4 | Explain how to collaborate with colleagues to resolve customer objections and complaints. |

| 3 | Continued | 3.5 | Describe how to handle issues such as delivery delays, refunds, product returns, and replacements. |
| | | 3.6 | Explain how customer feedback can be used as a tool to measure and improve sales activities. |
| 4 | Understand organisational sales process and customer engagement strategy. | 4.1 | Explain the importance of protecting the company brand, image, and reputation in remote sales. |
| | | 4.2 | Describe the organisation's objectives and targets for online sales. |
| | | 4.3 | Analyse competitors' activities, products, and services in the market. |
| | | 4.4 | Explain the features, value, and unique selling points (USPs) of products and services. |
| | | 4.5 | Describe the sales terms and conditions and their importance in customer communications. |
| | | 4.6 | Identify different sales channels used for selling products and services remotely. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

**Learning Outcome 4** asks candidates to put their knowledge within the context of an organisation. This may be their current employer, an organisation they volunteer with, an organisation they know well, or a fictional organisation provided to them via a case study or simulated assignment. Where a fictional organisation is used for context, this should be provided by the centre and not generated by the candidate.

| Title: | Selling Products and Services Internationally | | Level: | 2 | | |
|---|---|---|---|---|---|---|
| Unit Number: | F/651/5066 | TQT: | 100 | GLH: | 80 | |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand the legal and cultural aspects of international sales. | 1.1 | Describe the key legal and cultural rules businesses must follow when selling in another country. |
| | | 1.2 | Identify ethical, social, and cultural issues that affect international trade. |
| | | 1.3 | Explain how these legal and cultural considerations impact international sales strategies. |
| 2 | Understand international selling strategies and techniques. | 2.1 | Identify the methods, strategies, and tactics for selling internationally. |
| | | 2.2 | Describe the sources and types of information needed to research international markets effectively. |
| | | 2.3 | Identify communication channels used in remote sales and describe etiquette and best practices for using them. |
| | | 2.4 | Identify potential risks and barriers when selling internationally and strategies to mitigate them. |
| 3 | Understand how to identify and engage with international customers. | 3.1 | Explain how to identify and qualify sales prospects in target countries. |
| | | 3.2 | Describe methods for establishing international sales leads. |
| | | 3.3 | Identify relevant sales techniques and explain how to use them in international markets. |
| | | 3.4 | Explain how search options and consumer culture preferences in target countries affect international sales. |

| 3 | Continued | 3.5 | Describe the importance of language support in international sales and how organisations provide this. |
|---|---|---|---|
| 4 | Understand logistical and financial considerations in international sales. | 4.1 | Explain how to coordinate with colleagues in other teams to arrange:<br><br>• Customer service support.<br>• Payment options.<br>• Shipping.<br>• Taxes. |
| | | 4.2 | Compare the differences between UK and international customers in terms of:<br><br>• Buying behaviour.<br>• Expectations.<br>• Regulations. |
| | | 4.3 | Explain how currency exchange rate fluctuations impact sales activities. |
| 5 | Understand sales growth and performance monitoring in international markets. | 5.1 | Explain the concepts of cross-selling and up-selling and how to maximise opportunities to grow business abroad. |
| | | 5.2 | Describe effective methods for overcoming objections and closing sales in international markets. |
| | | 5.3 | Explain the importance of monitoring and reviewing the performance of international sales activities. |
| | | 5.4 | Identify key performance indicators (KPIs) and evaluation methods for international sales success. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Principles and Practice of Customer Service | Level: | 2 |
|---|---|---|---|
| Unit Number: | H/651/5067 | TQT: | 70 | GLH: | 50 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles of customer service. | 1.1 | Define customer service and explain its importance to a business or organisation. |
| | | 1.2 | Describe the key objectives of good customer service. |
| | | 1.3 | Explain the benefits of delivering high-quality customer service for both customers and the organisation. |
| | | 1.4 | Identify different types of customers (e.g., new, returning, internal, external) and their varying needs. |
| | | 1.5 | Explain the impact of poor customer service on customer satisfaction and business reputation. |
| 2 | Understand how to communicate effectively with customers. | 2.1 | Identify different methods of communication used in customer service. |
| | | 2.2 | Explain the importance of active listening and questioning techniques in customer interactions. |
| | | 2.3 | Describe how tone of voice, body language, and facial expressions affect customer interactions. |
| | | 2.4 | Identify barriers to effective communication and how to overcome them. |
| | | 2.5 | Explain the importance of adapting communication styles to different customers and situations. |
| 3 | Understand how to identify and meet customer needs. | 3.1 | Explain the difference between customer needs, expectations, and wants. |
| | | 3.2 | Describe ways to assess and understand customer needs. |
| | | 3.3 | Explain how to respond appropriately to customer requests and enquiries. |

| 3 | Continued | 3.4 | Identify the importance of personalising the customer experience where possible. |
|---|---|---|---|
|  |  | 3.5 | Explain the role of problem-solving in customer service and how to resolve straightforward customer concerns. |
| 4 | Understand how to deliver high-quality customer service. | 4.1 | Identify the key principles of professional and polite customer interactions. |
|  |  | 4.2 | Describe the importance of time management in customer service. |
|  |  | 4.3 | Explain how to manage customer expectations realistically and professionally. |
|  |  | 4.4 | Identify the importance of following organisational policies and procedures when providing customer service. |
|  |  | 4.5 | Explain the role of teamwork in delivering consistent customer service. |
| 5 | Understand how to gather and use customer feedback. | 5.1 | Explain the importance of gathering customer feedback for service improvement. |
|  |  | 5.2 | Identify common methods for collecting customer feedback. |
|  |  | 5.3 | Describe how customer feedback can be used to improve customer service. |
|  |  | 5.4 | Explain the importance of maintaining a positive attitude when receiving feedback. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Processing Customer Information | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | J/651/5068 | TQT: 80 | GLH: | 50 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand procedures for processing customer information. | 1.1 | Explain common procedures and guidelines for collecting, retrieving, and supplying customer information. |
| | | 1.2 | Identify the roles involved in data processing within an organisation and describe their responsibilities. |
| | | 1.3 | Describe how correctly processing customer information contributes to overall customer service. |
| | | 1.4 | Explain the importance of attention to detail and quality checks when handling customer data. |
| 2 | Understand legal and regulatory requirements for handling customer information. | 2.1 | Identify the legal requirements and codes of practice related to data protection. |
| | | 2.2 | Explain how to use the organisation's system for storing customer information. |
| | | 2.3 | Explain which types of personal customer information should or should not be kept on record. |
| | | 2.4 | Outline the procedures to follow in the event of a data processing error or a breach of data protection regulations. |

| 3 | Understand how to store and manage customer data securely. | 3.1 | Describe the correct procedures for storing and using customer data securely. |
|---|---|---|---|
| | | 3.2 | Identify the circumstances under which customer information should be updated or removed from records. |
| | | 3.3 | Explain how to operate the organisation's customer information storage system. |
| | | 3.4 | Explain the process for ensuring data security and confidentiality. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Providing Customer Support Online | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | K/651/5069 | TQT: 80 | GLH: | 70 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand online service delivery systems. | 1.1 | Explain how online service delivery systems work. |
| | | 1.2 | Describe why it is important to understand and be confident in using your organisation's online support system. |
| | | 1.3 | Identify the reasons why organisations encourage customers to complete transactions themselves. |
| | | 1.4 | Explain the benefits and drawbacks of guiding customers through using the system versus completing transactions on their behalf. |
| 2 | Understand how to communicate effectively with customers using online systems. | 2.1 | Explain the importance of active listening in understanding what the customer is trying to achieve. |
| | | 2.2 | Describe ways to clearly and effectively communicate with customers who have varying levels of confidence or ability when using an online system. |
| | | 2.3 | Explain the importance of building customer confidence in using the online system. |
| | | 2.4 | Identify additional products or services that may be promoted to online customers. |
| 3 | Understand the use of self-service technologies in customer support. | 3.1 | Explain why an organisation offers customers self-service technologies. |
| | | 3.2 | Describe methods for observing customers using self-service technologies and identifying when they need assistance. |
| | | 3.3 | Explain how to operate self-service technologies from both a customer and staff perspective. |

| 3 | *Continued* | 3.4 | Identify frequently asked questions about self-service technologies and provide appropriate responses. |
| | | 3.5 | Describe techniques for demonstrating self-service technologies to customers. |
| 4 | Understand how to manage customer support for self-service technologies. | 4.1 | Identify signals and signs that indicate a customer needs help with self-service technologies. |
| | | 4.2 | Explain organisational procedures for staff intervention when assisting with self-service technologies. |
| | | 4.3 | Describe organisational procedures for dealing with self-service technology problems. |
| | | 4.4 | Explain the importance of building customer confidence in using self-service technologies. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Being a Customer Service Champion | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | D/651/5137 | TQT: | 100 | GLH: | 80 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the role of a customer service champion. | 1.1 | Describe the role and key responsibilities of a customer service champion, including their level of decision-making authority. |
| 2 | Understand how to monitor customer service developments. | 2.1 | Describe ways to keep up to date with changes and improvements in customer service. |
| | | 2.2 | Identify types of organisational developments that may affect customer service. |
| | | 2.3 | Explain how to analyse the implications of organisational developments on customer service. |
| 3 | Understand how to influence customer service improvements. | 3.1 | Explain how to build positive relationships and use influence to support customer service decisions. |
| | | 3.2 | Describe the importance of empathising with customers and representing their viewpoint constructively. |
| | | 3.3 | Explain how to provide advice and information to colleagues and partners on customer service issues. |
| 4 | Understand how to support and advise colleagues on customer service. | 4.1 | Explain how to identify when colleagues and partners need advice and information on customer service. |
| | | 4.2 | Describe different types of research that can be used to support advice and information on customer service. |
| | | 4.3 | Explain methods for monitoring the actions taken as a result of customer service advice. |
| | | 4.4 | Describe how to evaluate the results of customer service advice to identify improvements. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Delivering Customer Service to Challenging Customers | Level: | 2 |
|---|---|---|---|
| **Unit Number:** | M/651/5150 | **TQT:** 120 | **GLH:** 100 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand challenging customer behaviours and their causes. | 1.1 | Identify the types of customer behaviours that may be challenging to deal with. |
| | | 1.2 | Explain the different reasons why customers may behave in a challenging manner. |
| | | 1.3 | Describe how certain features of a product or service might lead to customer frustration or dissatisfaction. |
| 2 | Understand techniques for managing challenging customer interactions. | 2.1 | Explain how to actively listen to customers and clarify understanding. |
| | | 2.2 | Identify types of questions that help explore how a customer feels and what they've experienced. |
| | | 2.3 | Explain how to develop and demonstrate empathy towards customers. |
| | | 2.4 | Describe the differences between assertive, aggressive, and passive behaviours. |
| | | 2.5 | Explain why just repeating rules or procedures may not help calm a challenging customer. |
| 3 | Understand organisational support for handling challenging customers. | 3.1 | Explain what kinds of challenging behaviour are not acceptable and when it is appropriate to stop the interaction. |
| | | 3.2 | Describe the importance of informing managers or colleagues about potential further interactions with challenging customers. |
| | | 3.3 | Explain when and how to escalate challenging customer situations to a manager or a colleague in authority. |

| 4 | Understand safety and security considerations when dealing with challenging customers. | 4.1 | Identify situations where it is necessary to protect the safety and security of customers, colleagues, and yourself. |
| | | 4.2 | Explain the actions that can be taken to protect the security of customers and their property. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Handling Customer Complaints | Level: | 2 |
|---|---|---|---|
| Unit Number: | R/651/5151 | TQT: 120 | GLH: 100 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the importance of handling customer complaints. | 1.1 | Explain why dealing with complaints is a fundamental part of delivering customer service. |
| | | 1.2 | Describe how to recognise and interpret signals that customers may be considering making a complaint. |
| | | 1.3 | Explain the importance of minimising customer complaints and addressing them as they occur. |
| | | 1.4 | Explain how successfully handling a complaint can create an opportunity to impress a dissatisfied customer. |
| 2 | Understand conflict resolution techniques when handling complaints. | 2.1 | Identify techniques for handling conflicts with customers. |
| | | 2.2 | Explain how to negotiate a solution that is acceptable to both the customer and the organisation. |
| | | 2.3 | Explain why offering compensation, replacement products, or services may not always be the best resolution. |
| 3 | Understand organisational and regulatory procedures for handling complaints. | 3.1 | Explain what counts as a formal complaint in a given sector, and what the rules are for dealing with and reporting it. |
| | | 3.2 | Explain the importance of dealing with complaints within the organisation's agreed timescale. |
| | | 3.3 | Identify common procedures and systems used to escalate complaints within an organisation. |

| 3 | *Continued* | 3.4 | Describe when and how to escalate a complaint to a senior colleague or an independent third party. |
|---|---|---|---|
| | | 3.5 | Explain the cost and regulatory implications of admitting liability for an error made by the organisation. |
| 4 | Understand the impact of complaints and organisational learning. | 4.1 | Explain the importance of monitoring complaint levels and patterns to identify when customer service delivery should be reviewed. |
| | | 4.2 | Identify types of complaints that may have wider implications for the organisation. |
| | | 4.3 | Explain how complaints analysis can highlight necessary changes in functions, working processes, or policies. |
| 5 | Understand effective communication and response methods for complaints. | 5.1 | Identify the most effective response strategies for complaints submitted through different channels, including social media. |
| | | 5.2 | Explain the advantages and disadvantages of different response methods based on the complaint channel. |
| | | 5.3 | Describe the importance of maintaining communication with customers throughout the complaint resolution process. |
| | | 5.4 | Explain when specialist support may be required to resolve a complaint. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Planning Business Direction | Level: | 2 | |
|---|---|---|---|---|
| Unit Number: | T/651/5152 | TQT: | 80 | GLH: | 50 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand business focus and market position. | 1.1 | Explain how to assess a business's current market position using PESTLE analysis (Political, Economic, Social, Technological, Legal, and Environmental factors). |
| | | 1.2 | Describe how to decide the future direction of a business based on its position in the market and its goals for success. |
| | | 1.3 | Explain how to set business targets and objectives. |
| | | 1.4 | Identify the different parts of a business. |
| | | 1.5 | Explain why different teams or departments in a business might have different goals or priorities that cause conflict. |
| | | 1.6 | Describe how financial targets can impact productivity, income, and costs. |
| | | 1.7 | Identify sources of business advice and support. |
| 2 | Understand business planning. | 2.1 | Identify what should feature in a business plan for the:<br><br>• Short term.<br>• Medium term.<br>• Long term. |
| | | 2.2 | Identify different sources of funding and other types of business support. |
| | | 2.3 | Identify the key resources required to carry out business plans. |
| | | 2.4 | Describe the different types of business costs, including:<br><br>• Products and services.<br>• Staff.<br>• Finance.<br>• Premises.<br>• Equipment and technology.<br>• Marketing and administration. |

| 2 | *Continued* | 2.5 | Explain how to review and monitor the success of business plans. |
|---|---|---|---|
| | | 2.6 | Explain how to share business plans in a way that everyone understands and can follow. |
| | | 2.7 | Identify methods to motivate people and encourage them to implement business plans. |
| 3 | Understand legal and regulatory considerations for business. | 3.1 | Identify key laws and regulations that affect businesses. |
| | | 3.2 | Explain why it is important for businesses to keep up to date with laws and regulations. |
| 4 | Develop a simple business direction plan. | 4.1 | Produce a simple business direction plan that includes:<br><br>• Business focus and market position.<br>• Key objectives and targets.<br>• Business planning for the short, medium and long term.<br>• Financial and resource planning.<br>• Legal and regulatory considerations. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

**Learning Outcome 4** asks candidates to apply their knowledge to produce a simple business direction plan. This may be for a business:

• Where the candidate is currently employed.
• That the candidate currently owns.
• That the candidate would like to one day set up.
• That is based on a business idea provided by the centre.

Centres are reminded that this is a level 2 unit, and this should be reflected in the level of detail expected in the candidate's response.

| Title: | Running a Home-Based Business | Level: | 2 | | |
|---|---|---|---|---|---|
| Unit Number: | Y/651/5153 | TQT: | 100 | GLH: | 70 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Know how to manage yourself when working from home. | 1.1 | Describe how to plan and stick to working hours and daily tasks when working from home. |
| | | 1.2 | Identify strategies for staying focused and motivated while working from home or remotely. |
| | | 1.3 | Identify ways to balance work and personal life when working from home or remotely. |
| 2 | Understand business operations for a home-based or remote business. | 2.1 | Explain how to maintain a professional image when running a business from home or remotely. |
| | | 2.2 | Identify the business insurance and permissions required for operating a home-based business. |
| | | 2.3 | Explain what business rates are and how to check if they apply to a home-based business. |
| | | 2.4 | Identify factors that may affect business operations when working from home or remotely. |
| | | 2.5 | Describe strategies to avoid interruptions and disruptions while working from home. |
| | | 2.6 | Identify sources of information and support for running a business from home or remotely. |
| | | 2.7 | Describe the benefits of operating a remote or home-based business compared to an office-based business. |
| | | 2.8 | Describe message facilities and phone call management options for outside of working hours. |
| | | 2.9 | Identify the necessary storage, filing, workstation setup, and other equipment for running a home-based business. |
| | | 2.10 | Describe the key technologies required for working from home or remotely. |

| 2 | *Continued* | 2.11 | Explain ways to protect and secure work areas, computer systems, and business equipment. |
|---|---|---|---|
| | | 2.12 | Identify suitable places for meeting customers, colleagues, and stakeholders when working remotely. |
| | | 2.13 | Explain the benefits of networking when running a business from home or remotely. |
| 3 | Understand legal and regulatory considerations relevant to running a home-based or remote business. | 3.1 | Identify key legal requirements for running a home-based or remote business. |
| | | 3.2 | Explain the necessary signage required to comply with relevant laws and regulations. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Principles and Practice of Freelance Services | Level: | 2 | | |
|---|---|---|---|---|---|
| Unit Number: | A/651/5154 | TQT: | 100 | GLH: | 80 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the role of networking and marketing freelance services. | 1.1 | Explain how to build and use personal and professional networks to find work opportunities. |
| | | 1.2 | Describe how to build your reputation and seek employment opportunities. |
| | | 1.3 | Identify the tools for promoting services to customers and employing organisations. |
| | | 1.4 | Describe how to seek, follow up and maintain contact with potential customers and access work opportunities. |
| 2 | Understand how to plan to provide freelance services. | 2.1 | Identify where to find the relevant sources of advice and information on employment, insurance, tax regulations and other small business legislation, and VAT. |
| | | 2.2 | Describe how to plan ahead and make back-up plans to keep work and income steady. |
| | | 2.3 | Describe how to plan to maintain workflow in terms of required income, time available and outcomes required. |
| | | 2.4 | Explain how to estimate time requirements for jobs. |
| | | 2.5 | Describe how to maintain professional standards of behaviour and personal presentation. |
| | | 2.6 | Describe how to work with different types of businesses and fit in with their way of working. |

| 3 | Understand the financial considerations relating to providing freelance services. | 3.1 | Describe how to set and manage personal and business budgets. |
| | | 3.2 | Describe how to maintain your financial accounts in terms of bookkeeping, income, expenditure and cash flow. |
| | | 3.3 | Describe how to set up systems for purchase orders, invoicing, filing and chasing late payments. |
| | | 3.4 | Explain how to budget for resources and overheads, such as rent, equipment, electricity, telephone charges and bank interest. |
| | | 3.5 | Explain how to calculate and allow for business development costs. |
| | | 3.6 | Explain how to estimate fee rates for work, resources, and expenses such as food and accommodation. |
| 4 | Understand how to negotiate contracts as a freelancer. | 4.1 | Describe how to agree a freelance contract that includes legal rules, how much you will earn, the time needed, and the work agreed. |
| | | 4.2 | Explain how to make sure contracts are clearly detailed including but not limited to: <ul><li>Deadlines.</li><li>Outcomes.</li><li>Payment terms.</li><li>Time limits for payment.</li></ul> |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Exploring Business Potential | Level: | 2 |
|---|---|---|---|
| Unit Number: | D/651/5155 | TQT: 80 | GLH: 50 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand personal investments that may be required to run a business. | 1.1 | Identify different types of investments required for business success. |
| | | 1.2 | Explain how to analyse personal and business aims in the short, medium, and long term. |
| | | 1.3 | Compare personal needs and the needs and aims of a business. |
| | | 1.4 | Describe how to calculate the personal financial requirements needed to sustain a living. |
| | | 1.5 | Explain how running a business may affect benefits such as working tax credit or Universal Credit. |
| | | 1.6 | Discuss how business operations may affect personal lifestyle. |
| 2 | Understand how to develop business skills and capabilities. | 2.1 | Identify skills needed to find and create business opportunities. |
| | | 2.2 | Identify information and resources that support business skills development. |
| | | 2.3 | Identify operational skills required to ensure business functionality. |
| 3 | Evaluate own business skills and capabilities. | 3.1 | Evaluate own personal technical skills and experience in producing a product or delivering a service. |
| | | 3.2 | Evaluate own managerial and other business-related skills, such as marketing, business strategy, innovation, and creativity. |
| 4 | Understand how to assess business performance and seek support. | 4.1 | Explain methods for monitoring and assessing personal and business performance. |
| | | 4.2 | Explain the importance of seeking feedback from family, funders, stakeholders, and customers. |
| | | 4.3 | Identify sources of support and advice for assessing business performance. |

| 5 | Explore the potential of a business idea. | 5.1 | Produce a structured evaluation of a business idea, including:<br><br>• Needs.<br>• Financial goals.<br>• Risks.<br>• Required skills.<br>• Performance assessment. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

**Learning outcomes 3 and 5** ask candidates to apply their knowledge to explore the potential of a business or business idea. This may be for a business:

- Where the candidate is currently employed.
- That the candidate currently owns.
- That the candidate would like to one day set up.
- That is based on a business idea provided by the centre.

Centres are reminded that this is a level 2 unit, and this should be reflected in the level of detail expected in the candidate's response.

| Title: | Developing a Business Vision and Goals | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | R/651/5160 | TQT: | 80 | GLH: | 50 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles of developing vision and goals for a business. | 1.1 | Explain how to align personal vision and goals with those of a new business venture. |
| | | 1.2 | Define the key components of a vision statement for a new business venture. |
| | | 1.3 | Discuss the importance of achieving buy-in from colleagues and stakeholders when developing a vision and goals. |
| 2 | Understand how to communicate vision and goals to stakeholders. | 2.1 | Describe informal methods of presenting ideas related to a business venture's vision and goals within an organisation. |
| | | 2.2 | Explain how to present the benefits of a new venture to gain commitment from colleagues and stakeholders. |
| | | 2.3 | Identify marketing and communication methods for sharing the vision and goals of a new business with internal and external stakeholders. |
| 3 | Understand how to measure and monitor business progress. | 3.1 | Identify tools used to measure the current performance of an organisation. |
| | | 3.2 | Discuss the advantages and disadvantages of a range of tools used to measure the current performance of an organisation. |
| | | 3.3 | Explain systems for monitoring and reviewing progress toward business vision and goals. |
| | | 3.4 | Identify the available resources that support the development of a business vision and goals. |

| 4 | Understand how to plan and implement a business vision. | 4.1 | Describe how to construct a roadmap highlighting the activities and milestones required to achieve a business vision. |
| | | 4.2 | Identify potential barriers and challenges that established ways of working may present to the success of a new venture. |
| | | 4.3 | Identify strategies for addressing challenges and leveraging opportunities in relation to a business vision and goals. |
| 5 | Develop business vision and goals. | 5.1 | Produce a simple vision statement and set of goals for a real or fictional business. |
| | | 5.2 | Produce a basic roadmap outlining key activities and milestones for achieving the vision and goals. |
| | | 5.3 | Present the vision, goals, and roadmap in a structured format suitable for business planning and decision-making. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

**Learning outcome 5** ask candidates to apply their knowledge to create a vision and set of goals for a business or business idea. This may be for a business:

- Where the candidate is currently employed.
- That the candidate currently owns.
- That the candidate would like to one day set up.
- That is based on a business idea provided by the centre.

Centres are reminded that this is a level 2 unit, and this should be reflected in the level of detail expected in the candidate's response.

| Title: | Understanding Business Structures | Level: | 2 |
|---|---|---|---|
| Unit Number: | T/651/5161 | TQT: | 70 | GLH: | 50 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand legal business structures. | 1.1 | Describe the different legal structures available for businesses, including:<br><br>• Sole trader.<br>• Partnership.<br>• Limited liability partnership (LLP).<br>• Limited company (Ltd).<br>• Private limited company (PLC).<br>• Right-to-manage (RTM) company.<br>• Community interest company (CIC). |
| | | 1.2 | Describe the key documents needed to set up and run each type of business. |
| | | 1.3 | Explain which authorities must be notified when setting up a business. |
| 2 | Understand financial and tax implications of different business structures. | 2.1 | Explain the tax and National Insurance requirements for different business structures and how they are paid. |
| | | 2.2 | Describe how different legal structures affect relationships with customers and suppliers. |
| | | 2.3 | Identify who makes management decisions in different types of businesses. |
| | | 2.4 | Outline the types of records and accounts required for different business structures. |
| | | 2.5 | Compare the financial liabilities of different business structures. |
| | | 2.6 | Explain how different business structures affect tax obligations and financial risks. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Principles and Practice of Financial Records for Business | Level: | 2 |
|---|---|---|---|
| **Unit Number:** | Y/651/5162 | **TQT:** 120 | **GLH:** 100 |

| Learning Outcomes<br>*The learner will be able to:* | | Assessment Criteria<br>*The learner can:* | |
|---|---|---|---|
| 1 | Understand the financial records required for business activities. | 1.1 | Identify the key financial records required for business activities. |
| | | 1.2 | Describe the types of records related to business assets and funds. |
| | | 1.3 | Explain how to produce financial records, including:<br><br>• Ledgers.<br>• Journals.<br>• Invoices.<br>• Receipts.<br>• Payment records. |
| | | 1.4 | Describe how financial records help monitor the financial health of a business. |
| 2 | Understand financial transactions and statements. | 2.1 | Explain the financial statements and statutory returns required for different business structures. |
| | | 2.2 | Explain how to monitor budgets, invoicing, payments, and receipts. |
| | | 2.3 | Define different accounting periods, including the financial year and tax year. |
| | | 2.4 | Explain how to choose appropriate accounting periods for business needs. |
| 3 | Understand financial forecasting and monitoring. | 3.1 | Describe how cash flow, profit and loss statements, and balance sheets relate to each other. |
| | | 3.2 | Identify key financial measures and forecasts required for business operations. |
| | | 3.3 | Explain the importance of monitoring customer payments (credit control), cash flow management, and bank transactions, including bank charges. |

| 3 | *Continued* | 3.4 | Explain how to prepare and interpret:<br><br>• Cash flow forecasts.<br>• Profit and loss statements.<br>• Balance sheets. |
|---|---|---|---|
| 4 | Know how to ensure security and compliance in financial record keeping. | 4.1 | Explain how to keep paper and electronic financial records secure from loss, damage, and theft. |
| | | 4.2 | Describe the importance of using passwords, encryption, and two-step verification for electronic financial records. |
| 5 | Know how and why to access financial information and professional advice. | 5.1 | Identify reliable sources of information on financial record-keeping. |
| | | 5.2 | Explain why it is important to seek professional and technical financial advice. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Managing Cash Flow for Business | Level: | 2 | | |
|---|---|---|---|---|---|
| Unit Number: | A/651/5163 | TQT: | 100 | GLH: | 90 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand the principles of business cash flow. | 1.1 | Identify the key costs and bills associated with business activities. |
| | | 1.2 | Explain how cash flow targets link to overall business financial plans. |
| | | 1.3 | Describe the requirements for forecasting cash flow. |
| | | 1.4 | Explain how to prepare cash flow statements and forecast possible high and low cash flow rates. |
| 2 | Understand how to monitor and manage cash flow. | 2.1 | Explain how to monitor cash flow using daily records and bank statements. |
| | | 2.2 | Describe how to choose appropriate timescales for financial forecasts. |
| | | 2.3 | Identify the methods used to forecast business income and spending. |
| | | 2.4 | Explain how the frequency and timing of cash inflows and outflows affect cash flow. |
| 3 | Understand how to control cash flow in business. | 3.1 | Explain strategies for controlling sources and uses of cash, including: <br> • Moving cash between accounts. <br> • Buying and selling stock. <br> • Minimizing creditors and bad debtors. <br> • Managing payments to creditors. <br> • Paying tax. <br> • Buying and selling assets. <br> • Short-term sales and pricing policies. |
| | | 3.2 | Identify factors that may affect cash flow. |

| 4 | Understand how to address cash flow shortfalls and improve cash flow. | 4.1 | Explain the actions to take when cash inflows and outflows do not align. |
|---|---|---|---|
| | | 4.2 | Describe methods to improve cash flow, such as:<br><br>• Debt factoring and invoice discounting.<br>• Increasing sales and profitability.<br>• Exploring new markets.<br>• Reducing stock orders. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Principles and Practice of Business Banking | Level: | 2 |
|---|---|---|---|
| Unit Number: | D/651/5164 | TQT: 100 | GLH: 80 |

| Learning Outcomes _The learner will be able to:_ | | Assessment Criteria _The learner can:_ | |
|---|---|---|---|
| 1 | Understand business banking requirements. | 1.1 | Identify key banking requirements for a business. |
| | | 1.2 | Explain the different banking facilities and options important for businesses. |
| | | 1.3 | Describe how to specify and prioritise business banking needs. |
| | | 1.4 | Identify sources of information for selecting a suitable bank. |
| 2 | Understand business banking options. | 2.1 | Compare different banks and types of banking, including:<br><br>• High street banks.<br>• Online banks.<br>• Specialist business banks. |
| | | 2.2 | Describe the different types of business accounts available. |
| | | 2.3 | Identify the advantages and disadvantages of different types of business bank accounts. |
| | | 2.4 | Identify the legal requirements for opening and operating a business bank account. |
| 3 | Understand how to manage business bank accounts. | 3.1 | Explain who is responsible for account administration and access. |
| | | 3.2 | Describe the process of depositing money into a business account. |
| | | 3.3 | Explain the process for making withdrawals, including ordering change if required. |
| | | 3.4 | Describe how to reconcile bank statements with accounting records. |

| 4 | Understand how to ensure security when banking for business. | 4.1 | Explain how to protect business account information and online banking security. |
| | | 4.2 | Describe why it is important to store banking records securely. |
| 5 | Understand the importance of reviewing business banking arrangements. | 5.1 | Explain the importance of regularly reviewing banking arrangements. |
| | | 5.2 | Describe the process of switching to a different account type or bank. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Managing Customer Payments | | Level: | 2 |
|---|---|---|---|---|
| Unit Number: | F/651/5165 | TQT: | 100 | GLH: | 80 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand credit control and its impact. | 1.1 | Identify relevant legislation relating to credit control. |
| | | 1.2 | Identify the benefits of good credit control. |
| | | 1.3 | Define targets for controlling credit, including collecting payments and reducing bad debts. |
| | | 1.4 | Explain the effect of debts on a business in terms of costs and cash flow. |
| | | 1.5 | Describe the costs associated with different debt-collecting options. |
| 2 | Understand how to implement credit control systems. | 2.1 | Describe the types of documents and methods used in credit control. |
| | | 2.2 | Explain credit control systems for minimising bad debts, including aged debtor analysis and credit ratings. |
| | | 2.3 | Identify options for collecting debts, including phone calls, legal action, and debt-collecting agencies. |
| | | 2.4 | Explain the benefits and possible costs of achieving credit control targets for the business. |
| | | 2.5 | Explain the financial implications of losing customers due to credit control enforcement. |
| | | 2.6 | Describe common challenges in implementing credit control systems. |
| 3 | Understand how to monitor credit control systems. | 3.1 | Identify sources of customer credit information. |
| | | 3.2 | Explain how to obtain feedback from clients about credit control. |
| | | 3.3 | Identify which customers and staff need to be informed about credit control systems. |
| | | 3.4 | Describe how to assess risks related to customer credit, including volume of expected business. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

| Title: | Preparing and Paying Wages | | Level: | 2 | |
|---|---|---|---|---|---|
| Unit Number: | H/651/5166 | TQT: | 80 | GLH: | 70 |

| Learning Outcomes *The learner will be able to:* | | Assessment Criteria *The learner can:* | |
|---|---|---|---|
| 1 | Understand how to process and pay wages. | 1.1 | Explain the process of registering with His Majesty's Revenue and Customs (HMRC) and obtaining a login for PAYE Online. |
| | | 1.2 | Identify the different payroll software systems available for maintaining employees' details, calculating pay, and managing deductions. |
| | | 1.3 | Describe the reporting procedures to HMRC and explain the importance of meeting deadlines to avoid penalties. |
| | | 1.4 | Describe the information that must be notified to HMRC about employees, including changes in employment status or personal circumstances. |
| | | 1.5 | Explain how to calculate national insurance and income tax deductions for employees. |
| | | 1.6 | Explain when and how to pay income tax and national insurance to HMRC. |
| | | 1.7 | Describe how to manage and handle any tax credits owed to employees. |
| | | 1.8 | Explain how and when to contact HMRC's payment enquiry helpline or other specialists for advice. |
| | | 1.9 | Describe the final payroll report to HMRC, how it links with employee final year records, and explain why it is important. |
| 2 | Understand payroll records. | 2.1 | Identify the records that need to be kept regarding employee pay and deductions. |
| | | 2.2 | Identify the reports that must be made to HMRC. |
| | | 2.3 | Identify the records required for documenting employee leave and sickness absences. |

| 2 | Continued | 2.4 | Describe how to process tax code notices for employees. |
|---|-----------|-----|---------------------------------------------------------|
|   |           | 2.5 | Explain the data protection requirements in relation to employee records. |

## Additional Assessment Information

This unit is **knowledge based.** This means that evidence is expected to take the form of candidate's written work and/or records of appropriate professional discussions.

# Appendix One – Command Verb Definitions

The table below explains what is expected from each **command verb** used in an assessment objective. Not all verbs are used in this specification.

| | |
|---|---|
| **Apply** | Use existing knowledge or skills in a new or different context. |
| **Analyse** | Break a larger subject into smaller parts, examine them in detail and show how these parts are related to each other. This may be supported by reference to current research or theories. |
| **Assess** | Offer a reasoned judgement of the standard/quality of situation/skills informed by relevant facts. |
| **Classify** | Organise information according to specific criteria. |
| **Compare** | Examine subjects in detail, giving the similarities and differences. |
| **Critically Compare** | As with compare, but extended to include pros and cons of the subject. There may or may not be a conclusion or recommendation as appropriate. |
| **Define** | State or describe the nature, scope or meaning. |
| **Describe** | Provide detailed, factual information about a subject. |
| **Discuss** | Give a detailed account of a subject, including a range of contrasting views and opinions. |
| **Explain** | As with describe, but extended to include causation and reasoning. |
| **Identify** | Select or ascertain appropriate information and details from a broader range of information or data. |
| **Interpret** | Use information or data to clarify or explain something. |
| **Outline** | A description setting out main characteristics/points. |
| **Produce** | Make or create something. |
| **State** | Give short, factual information about something. |
| **Specify** | State a fact or requirement clearly and in precise detail. |

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