



# Fairfield School of Business

## Edexcel BTEC HNC/HND in Business

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## Edexcel BTEC HNC/HND in Business

### **Rationale**

The suites of BTEC Higher Nationals are designed to provide specialist work-related qualifications appropriate to the skills needs of a range of sectors at levels 4 and 5. They offer a strong, sector-related emphasis on practical skills development alongside the development of requisite knowledge and understanding. They have been developed to provide the required knowledge, understanding and skills, in a sector context, necessary to prepare learners for employment and progression and/or to provide career development opportunities for those already in work.

BTEC Higher Nationals qualifications provide a thorough grounding in the key concepts and practical skills required in their sector and their national recognition by employers allows direct progression to employment. A key progression path for Edexcel BTEC HNC and HND learners is to the second or third year of a degree or honours degree programme. On successful completion of these qualifications, learners will be able to progress into or within employment and/or continue their study in the vocational area.

Higher Nationals in Business have been developed to focus on:

- Providing education and training for a range of careers in business such as management, administration, personnel, marketing, accounting, and law
- Providing a general qualification which allows flexibility of study to meet local or specialist needs.
- Providing specialist options which meet the needs of the major functions in business and allow specialisation with career progression and professional recognition in mind.
- Providing opportunities which underpin some of the knowledge and understanding required for the relevant NVQ level 4 units in Accounting, Management, and Business Administration.



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- Providing opportunities for learners to focus on the development of higher-level skills in a business context.
- Providing opportunities for learners to develop a range of skills and techniques and attributes essential for successful performance in working life.
- Providing opportunities for individuals in employment to achieve a nationally recognised level 4 vocationally specific qualification.
- Providing opportunities for learners to gain a nationally recognised vocationally specific qualification to enter employment in business or progress to higher education vocational qualifications such as a full-time degree in business or a related area.

## **Aims**

This qualification meets the needs of the above rationale by:

- Equipping individuals with knowledge, understanding and skills for success in a range of administrative and management positions in business.
- Providing specialist routes of study which relate to individual professions within the business world in which learners are working or intend to seek employment.
- Enabling progression to an undergraduate degree or further professional qualification in business or a related area
- Supporting individuals employed or entering employment in the business field
- Developing the individual's ability in the business field through effective use and combination of the knowledge and skills gained in different parts of the programme.
- Developing a range of skills and techniques, personal qualities and attributes essential for successful performance in working life and thereby enable learners to make an immediate contribution to employment.
- Providing flexibility, knowledge, skills and motivation as a basis for future studies and career development in business.

## **Career opportunities**

As a recognised vocational qualification, the HND will open doors into a range of business related positions in City firms, multinational companies, specialist consultancies and small and medium-sized enterprises across a broad range of industry sectors.



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## Duration of Study

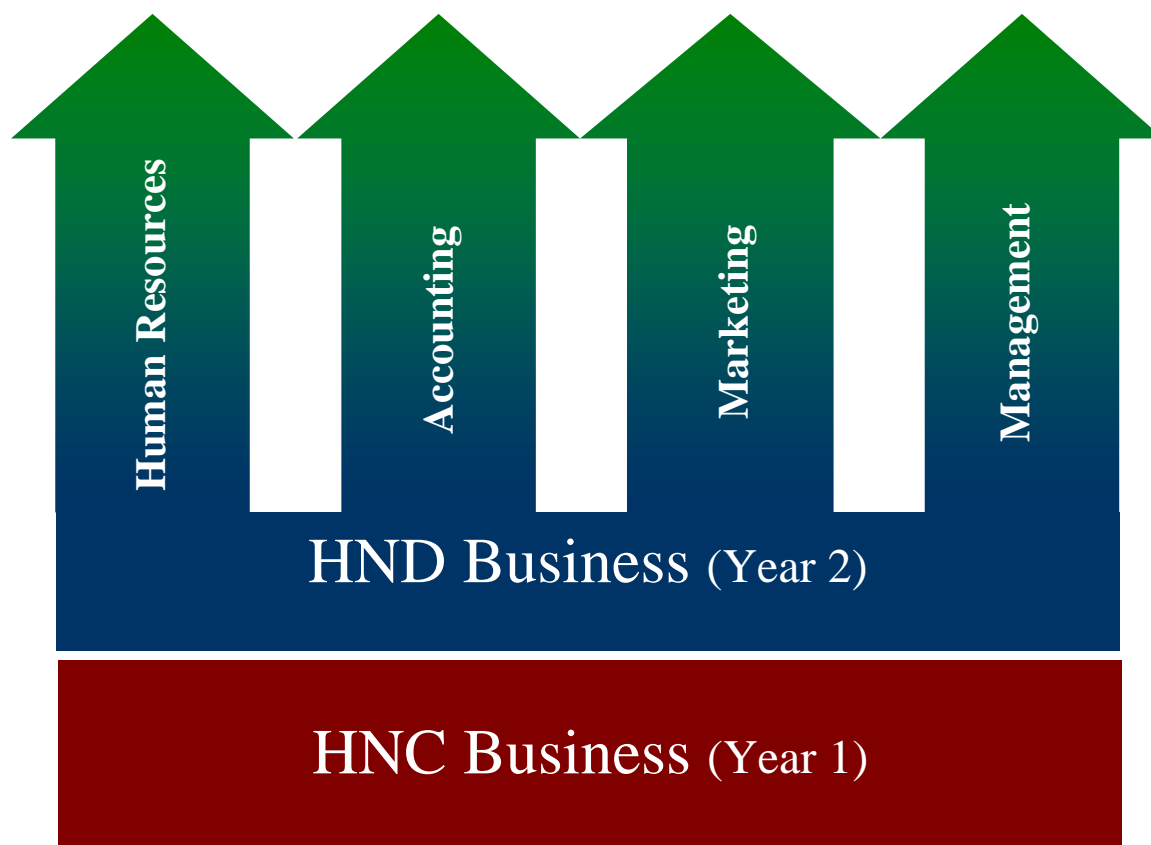
2 Years Full-time

## Syllabus

The BTEC Level 4 HNC (Year 1) in Business is a qualification with a minimum of 120 credits of which 60 are mandatory core.

The BTEC Level 5 HND (Year 2) in Business is a qualification with a minimum of 245 credits of which 120 credits are from Year 1 (HNC) and 125 credits are from Year 2 (HND). Fairfield will offer four pathways in HND Business final year study, which are as follows:

- HND in Business (Human Resources)
- HND in Business (Accounting)
- HND in Business (Marketing)
- HND in Business (Management)





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## Progression Route

### **Business Pathway**

Fairfield will be offering HND business in four specialisations. The Edexcel BTEC Level 5 HND programme must contain a minimum of 90 credits at level 4 and a minimum of 125 credits at level 5. The first year of study will cover most of the mandatory curriculum that includes the analysis of the impact of the external operating environment and the need to plan organisational strategies to ensure effective business performance, together with an introduction to the techniques and methods of research. A variety of research methodologies, including the opportunity to carry out interventionist or action research should be considered and a project report based on independent research into an area of professional business practice of interest completed.

The ways in which finance is managed within a business organisation will be considered, the different sources of finance evaluated and the use of financial information to make decisions studied. Also included will be consideration of decisions relating to pricing and investment, as well as budgeting, together with techniques for the evaluation of financial performance.

The internal nature of organisations from both a theoretical and practical viewpoint will be considered and it is intended to develop an understanding of the behaviour of people within organisations and the significance of organisational design and characteristics. The objectives of organisations and the influence of stakeholders are included as is the operation of organisations in relation to the local, national and global environment.

Also included is an introduction to the fundamental concepts and principles that underpin the marketing process, examine the role and practice of marketing within the changing business environment and include a concise and contemporary overview of marketing, together with the knowledge and skills to underpin further study in the specialist field of marketing.



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## Accounting pathway

This pathway will give learners an appreciation of financial planning and constraints. It will cover the collection and analysis of cost data for management purposes, budgetary planning and control, the preparation of financial statements for different types of business and legal and regulatory provisions, the accounting and management control systems of a business and an evaluation of their effectiveness, and the taxation of individuals and limited companies.

### YEAR 1

Unit# : Unit Name	QCF	Credit
Unit 01: Business environment	4	15
Unit 02: Managing Financial Resources & decisions	4	15
Unit 03: Organisations and Behaviour	4	15
Unit 04: Marketing principles	4	15
Unit 05: Aspects of contract and negligence for business	4	15
Unit 06: Business decision making	4	15
Unit 07: Business strategy	5	15
Unit 17: Marketing intelligence	4	15

### YEAR 2

Unit# : Unit Name	QCF	Credit
Unit 08: Research project	5	20
Unit 09: Management Accounting: Costing and Budgeting	4	15
Unit 10: Financial Accounting and Reporting	4	15
Unit 11: Financial systems and auditing	5	15
Unit 12: Taxation	5	15
Unit 13: Personal and professional development	5	15
Unit 19: Marketing planning	5	15
Unit 23: Human resource development	5	15



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## Management pathway

This pathway will cover the main functions of management including facilitating and managing change and providing a vision for the future; managing financial resources, physical resources, technology, the management of information and knowledge and providing products and services; building relationships, developing networks and partnerships and managing people; and leading business operations and meeting customer needs.

### YEAR 1

Unit# : Unit name	QCF	Credit
Unit 01: Business environment	4	15
Unit 02: Managing Financial Resources & decisions	4	15
Unit 03: Organisations and Behaviour	4	15
Unit 04: Marketing principles	4	15
Unit 05: Aspects of contract and negligence for business	4	15
Unit 06: Business decision making	4	15
Unit 07: Business strategy	5	15
Unit 17: Marketing intelligence	4	15

### YEAR 2

Unit# : Unit name	QCF	Credit
Unit 08: Research project	5	20
Unit 14: Working with and Leading People	5	15
Unit 15: Managing Business Activities to Achieve Results	4	15
Unit 18: Advertising and promotion in Business	5	15
Unit 19: Marketing planning	5	15
Unit 20: Sales Planning and Operations	5	15
Unit 23: Human Resource Development	5	15
Unit 47: Employability Skills	5	15



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## Marketing pathway

This pathway gives an overview of the marketing function. It will consider the purchase decision making process and the variables and situations influencing buyer behaviour as well as exploring the marketing research process; the ability to determine specific promotional activities in response to target audience; the application and evaluation of analytical tools to create a marketing plan; and sales planning and operations and the different stages of the sales process.

### YEAR 1

Unit# : Unit name	QCF	Credit
Unit 01: Business environment	4	15
Unit 02: Managing Financial Resources & decisions	4	15
Unit 03: Organisations and Behaviour	4	15
Unit 04: Marketing principles	4	15
Unit 05: Aspects of contract and negligence for business	4	15
Unit 06: Business decision making	4	15
Unit 07: Business strategy	5	15
Unit 17: Marketing intelligence	4	15

### YEAR 2

Unit# : Unit name	QCF	Credit
Unit 08: Research project	5	20
Unit 11: Financial systems and auditing	5	15
Unit 12: Taxation	5	15
Unit 13: Personal and professional development	5	15
Unit 18: Advertising and Promotion in Business	4	15
Unit 19: Marketing planning	5	15
Unit 20: Sales Planning and Operations	5	15
Unit 23: Human resource development	5	15





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## Human Resource Management pathway

This pathway covers the main areas of human resource management including an introduction to the human resource management role and function which is then built on to give a broader perspective to human resource management practices; of the role of training and employee development, including a consideration of government initiative aimed at developing skills; and employment relationships in the UK including industrial conflict, the resolution of disputes and negotiation.

### YEAR 1

Unit# : Unit name	QCF	Credit
Unit 01: Business environment	4	15
Unit 02: Managing Financial Resources & decisions	4	15
Unit 03: Organisations and Behaviour	4	15
Unit 04: Marketing principles	4	15
Unit 05: Aspects of contract and negligence for business	4	15
Unit 06: Business decision making	4	15
Unit 07: Business strategy	5	15
Unit 17: Marketing intelligence	4	15

### YEAR 2

Unit# : Unit name	QCF	Credit
Unit 08: Research project	5	20
Unit 13: Personal and professional development	5	15
Unit 14: Working with and Leading People	5	15
Unit 19: Marketing planning	5	15
Unit 21: Human Resource Management	4	15
Unit 22: Managing Human Resources	5	15
Unit 23: Human resource development	5	15
Unit 24: Employee Relations	4	15



# Fairfield School of Business

## Unit 1: Business Environment

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to provide learners with an understanding of different organisations, the influence of stakeholders and the relationship between businesses and the local, national and global environments.

- **Unit abstract**

Organisations have a variety of purposes that depend on why they were established. Some operate for profit, whilst others do not. Organisations structure themselves and operate in ways that allow their objectives to be met. Every organisation has a range of stakeholders whose interests need to be satisfied, but stakeholders have competing interests that may be hard to reconcile.

Businesses operate in an environment shaped by the government, competitors, consumers, suppliers, and international factors. Learners will understand that some influences on the business environment are direct and clear, for example taxation policies on corporate activities. Other influences are less clear, perhaps coming from the international arena and sometimes with only an oblique impact on the national business environment.

It is within this business environment that organisations function and have to determine strategies and a modus operandi that allow them to meet their organisational purposes in ways that comply with the relevant legal and regulatory frameworks. In addition, business markets take various forms and the structure of a market enables an understanding of how organisations behave. In this unit learners will consider how different market structures shape the pricing and output decisions of businesses, as well as other aspects of their behaviour.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the organisational purposes of businesses
2. Understand the nature of the national environment in which businesses operate
3. Understand the behaviour of organisations in their market environment
4. Be able to assess the significance of the global factors that shape national business activities.



# Fairfield School of Business

## Unit content

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### 1. Understand the organisational purposes of businesses

*Categories of organisation:* legal structure; type eg private company, public company, government, voluntary organisation, co-operative, charitable; sector (primary, secondary tertiary)

*Purposes:* mission; vision; aims; objectives; goals; values; profits; market share; growth; return on capital employed (ROCE); sales; service level; customer satisfaction; corporate responsibility; ethical issues

*Stakeholders:* owners; customers; suppliers; employees; debtors; creditors; financial institutions (banks, mortgage lenders, credit factors); environmental groups; government agencies (central government, local authorities); trade unions

*Responsibilities of organisations:* stakeholder interests; conflict of expectations; power influence matrix; satisfying stakeholder objectives; legal responsibilities eg consumer legislation, employee legislation, equal opportunities and anti-discriminatory legislation, environmental legislation, health and safety legislation; ethical issues eg environment, fair trade, global warming, charter compliance eg Banking Code

### 2. Understand the nature of the national environment in which businesses operate

*Economic systems:* the allocation of scarce resources; effective use of resources; type of economic system eg command, free enterprise, mixed, transitional

*The UK economy:* size (gross domestic product, gross national product); structure; population; labour force; growth; inflation; balance of payments; balance of trade; exchange rates; trading partners; public finances (revenues, expenditure); taxation; government borrowing; business behaviour eg investment, objectives, risk awareness; cost of capital; consumer behaviour; propensity to save; propensity to spend; tastes and preferences

*Government policy:* economic goals; fiscal policy: control of aggregate demand; central and local government spending; Public Sector Net Borrowing (PSNB) and Public Sector Net Cash Requirement (PSNCR); euro convergence criteria, monetary policy; interest rates; quantitative easing; private finance initiative (PFI); competition policy (up-to-date legislation including Competition Act 1998, Enterprise Act 2002); Competition Commission, Office of Fair Trading; Directorate General for Competition); European Commission); sector regulators eg Ofgem, Ofwat, Civil Aviation Authority; Companies Acts; regional policy; industrial policy; enterprise strategy; training and skills policy



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## **3 Understand the behaviour of organisations in their market environment**

*Market types:* perfect competition, monopoly, monopolistic competition, oligopoly, duopoly; competitive advantage, strategies adopted by firms; regulation of competition

*Market forces and organisational responses:* supply and demand, elasticity of demand; elasticity of supply; customer perceptions and actions, pricing decisions; cost and output decisions; economies of scale, the short run; the long run, multi-national and transnational corporations; joint ventures, outsourcing; core markets; labour market trends; employee skills, technology; innovation; research and development; core competencies; business environment (political, economic, social, technical, legal, environmental); cultural environment

## **4. Be able to assess the significance of the global factors that shape national business activities**

*Global factors:* international trade and the UK economy; market opportunities; global growth; protectionism; World Trade Organisation (WTO); emerging markets (BRIC economies – Brazil, Russia, India, China); EU membership; EU business regulations and their incorporation in to UK law; EU policies eg agriculture (CAP), business, competition, growth, employment, education, economics and finance, employment, environment, science and technology, regional); labour movement; workforce skills; exchange rates; trading blocs (eg monetary unions, common markets; customs unions, free trade areas); labour costs; trade duties; levies; tariffs; customs dues; taxation regimes; international competitiveness; international business environment (political, economic, social, technical, legal, environmental); investment incentives; cost of capital; commodity prices; intellectual property; climate change eg KyotoProtocol, Rio Earth Summit; third world poverty; the group of 20 (G-20); global financial stability.



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## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the organisational purposes of businesses	1.1 identify the purposes of different types of organisation  1.2 describe the extent to which an organisation meets the objectives of different stakeholders  1.3 explain the responsibilities of an organisation and strategies employed to meet them
LO2 Understand the nature of the national environment in which businesses operate	2.1 explain how economic systems attempt to allocate resources effectively  2.2 assess the impact of fiscal and monetary policy on business organisations and their activities  2.3 evaluate the impact of competition policy and other regulatory mechanisms on the activities of a selected organisation
LO3 Understand the behaviour of organisations in their market environment	3.1 explain how market structures determine the pricing and output decisions of businesses  3.2 illustrate the way in which market forces shape organisational responses using a range of examples  3.3 judge how the business and cultural environments shape the behaviour of a selected organisation
LO4 Be able to assess the significance of the global factors that shape national business activities	4.1 discuss the significance of international trade to UK business organisations  4.2 analyse the impact of global factors on UK business organisations  4.3 evaluate the impact of policies of the European Union on UK business organisations.

### **Essential requirements**

There are no essential or unique resources required for the delivery of this unit.



# Fairfield School of Business

## Unit 2: Managing Financial Resources and Decisions

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The unit aim is to provide learners with an understanding of where and how to access sources of finance for a business, and the skills to use financial information for decision making.

- **Unit abstract**

This unit is designed to give learners a broad understanding of the sources and availability of finance for a business organisation. Learners will learn how to evaluate these different sources and compare how they are used.

They will learn how financial information is recorded and how to use this information to make decisions for example in planning and budgeting.

Decisions relating to pricing and investment appraisal are also considered within the unit. Finally, learners will learn and apply techniques used to evaluate financial performance.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the sources of finance available to a business
2. Understand the implications of finance as a resource within a business
3. Be able to make financial decisions based on financial information
4. Be able to evaluate the financial performance of a business.



# Fairfield School of Business

## Unit content

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### 1. Understand the sources of finance available to a business

*Range of sources:* sources for different businesses; long term such as share capital; retained earnings; loans; third-party investment; short/medium term such as hire purchase and leasing; working capital stock control; cash management; debtor factoring

*Implications of choices:* legal, financial and dilution of control implications; bankruptcy

*Choosing a source:* advantages and disadvantages of different sources; suitability for purpose eg matching of term of finance to term of project

### 2. Understand the implications of finance as a resource within a business

*Finance costs:* tangible costs eg interest, dividends; opportunity costs eg loss of alternative projects when using retained earnings; tax effects

*Financial planning:* the need to identify shortages and surpluses eg cash budgeting; implications of failure to finance adequately; overtrading

*Decision making:* information needs of different decision makers

*Accounting for finance:* how different types of finance and their costs appear in the financial statements of a business; the interaction of assets and liabilities on the balance sheet and on international equivalents under the International Accounting Standards (IAS)

### 3. Be able to make financial decisions based on financial information

*Budgeting decisions:* analysis and monitoring of cash and other budgets

*Costing and pricing decisions:* calculation of unit costs, use within pricing decisions; sensitivity analysis

*Investment appraisal:* payback period; accounting rate of return; discounted cash flow techniques ie net present value; internal rate of return

*Nature of long-term decisions:* nature of investment importance of true value of money; cash flow; assumptions in capital investment decisions; advantages and disadvantages of each method

### 4. Be able to evaluate the financial performance of a business

*Terminology:* introduction to debit, credit, books of prime entry, accounts and ledgers, trial balance, final accounts and international equivalents under the International Accounting Standards (IAS)



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*Financial statements:* basic form, structure and purpose of main financial statements ie balance sheet, profit and loss account, cash flow statement, notes, preparation not required; changes to reporting requirements under the International Accounting Standards (IAS) eg statement of comprehensive income, statement of financial position; distinctions between different types of business ie limited company, partnership, sole trader

*Interpretation:* use of key accounting ratios for profitability, liquidity, efficiency and investment; comparison both external ie other companies, industry standards and internal ie previous periods, budgets





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## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the sources of finance available to a business	1.1 identify the sources of finance available to a business  1.2 assess the implications of the different sources  1.3 evaluate appropriate sources of finance for a business project
LO2 Understand the implications of finance as a resource within a business	2.1 analyse the costs of different sources of finance  2.2 explain the importance of financial planning  2.3 assess the information needs of different decision makers  2.4 explain the impact of finance on the financial statements
LO3 Be able to make financial decisions based on financial information	3.1 analyse budgets and make appropriate decisions  3.2 explain the calculation of unit costs and make pricing decisions using relevant information  3.3 assess the viability of a project using investment appraisal techniques
LO4 Be able to evaluate the financial performance of a business	4.1 discuss the main financial statements  4.2 compare appropriate formats of financial statements for different types of business  4.3 interpret financial statements using appropriate ratios and comparisons, both internal and external.

### **Essential requirements**

Learners will require access to financial and company reports.



# Fairfield School of Business

## Unit 3: Organisations and Behaviour

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to give learners an understanding of individual and group behaviour in organisations and to examine current theories and their application in managing behaviour in the workplace.

- **Unit abstract**

This unit focuses on the behaviour of individuals and groups within organisations. It explores the links between the structure and culture of organisations and how these interact and influence the behaviour of the workforce. The structure of a large multi-national company with thousands of employees worldwide will be very different from a small local business with 20 employees. The way in which an organisation structures and organises its workforce will impact on the culture that develops within the organisation. This system of shared values and beliefs will determine and shape the accepted patterns of behaviour of an organisations workforce. The culture in organisations that differ in size, for example, or are from different sectors of the economy can be very different.

The structure and culture of an organisation are key factors which contribute to motivating the workforce at all levels of the organisation. The Japanese were instrumental in developing a culture of ‘continuous improvement through teamwork’ in their manufacturing industry. This culture has now been exported around the world and encapsulates the way in which structure and culture contribute to patterns of behaviour in the workplace. This unit will develop learner understanding of the behaviour of people within organisations and of the significance that organisational design has on shaping that behaviour.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the relationship between organisational structure and culture
2. Understand different approaches to management and leadership
3. Understand ways of using motivational theories in organisations
4. Understand mechanisms for developing effective teamwork in organisations.



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## Unit content

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### 1. Understand the relationship between organisational structure and culture

*Types of organisation and associated structures:* functional, product-based, geographically based, multi-functional and multi-divisional structures, matrix, centralisation and decentralisation; organisational charts; spans of control; internal and external network structures; flexible working

*Organisational culture:* classification of organisational culture – power culture, role culture, task culture, person culture; cultural norms and symbols; values and beliefs; development of organisational culture

*Diagnosing behavioural problems:* concepts; principles; perspectives; methodology

*Perception:* definition; perceptual selection; perception and work behaviour; attitude; ability and aptitude; intelligence

*Significance and nature of individual differences:* self and self-image; personality and work behaviour; conflict

*Individual behaviour at work:* personality, traits and types; its relevance in understanding self and others

### 2. Understand different approaches to management and leadership

Development of management thought: scientific management; classical administration; bureaucracy; human relations approach; systems approach; contingency approach

*Functions of management:* planning; organising; commanding; coordinating; controlling

*Managerial roles:* interpersonal; informational; decisional

*Nature of managerial authority:* power; authority; responsibility; delegation; conflict

*Frames of reference for leadership activities:* opportunist; diplomat; technician; achiever; strategist; magician; pluralistic; transformational; change

### 3. Understand ways of using motivational theories in organisations

*Motivation theories:* Maslow's Hierarchy of Needs; Herzberg's Motivation – Hygiene theory; McGregor's Theory X and Y; Vroom and Expectancy theories; Maccoby, McCrae and Costa – personality dimensions

*Motivation and performance:* rewards and incentives; motivation and managers; monetary and non-monetary rewards

*Leadership:* leadership in organisations; managers and leaders; leadership traits; management style; contingency approach; leadership and organisational culture



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*Leadership and successful change in organisations:* pluralistic; transformational; communications; conflict

## **4. Understand mechanisms for developing effective teamwork in organisations**

*Teams and team building:* groups and teams; informal and formal groups; purpose of teams; selecting team members; team roles; Belbin's theory; stages in team development; team building; team identity; team loyalty; commitment to shared beliefs; multi-disciplinary teams

*Team dynamics:* group norms; decision-making behaviour; dysfunctional teams; cohesiveness

*Impact of technology on team functioning:* technology; communication; change; networks and virtual teams; global and cross-cultural teams



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## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the relationship between organisational structure and culture	1.1 compare and contrast different organisational structures and culture 1.2 explain how the relationship between an organisation's structure and culture can impact on the performance of the business 1.3 discuss the factors which influence individual behaviour at work
LO2 Understand different approaches to management and leadership	2.1 compare the effectiveness of different leadership styles in different organisations 2.2 explain how organisational theory underpins the practice of management 2.3 evaluate the different approaches to management used by different organisations
LO3 Understand ways of using motivational theories in organisations	3.1 discuss the impact that different leadership styles may have on motivation in organisations in periods of change 3.2 compare the application of different motivational theories within the workplace 3.3 evaluate the usefulness of a motivation theory for managers
LO4 Understand mechanisms for developing effective teamwork in organisations	4.1 explain the nature of groups and group behaviour within organisations 4.2 discuss factors that may promote or inhibit the development of effective teamwork in organisations 4.3 evaluate the impact of technology on team functioning within a given organisation.

### **Essential requirements**

There are no essential or unique resources required for the delivery of this unit.



# Fairfield School of Business

## Unit 4: Marketing Principles

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

This unit aims to provide learners with understanding and skills relating to the fundamental concepts and principles that underpin the marketing process.

- **Unit abstract**

This is a broad-based unit which gives learners the opportunity apply the key principles of marketing.

Firstly, the unit looks at the definitions of marketing, and what is meant by a marketing orientation and the marketing process.

Next, learners consider the use of environmental analysis in marketing and carry out their own analyses at both macro and micro levels. They will also investigate the importance of market segmentation and how this leads to the identification and full specification of target groups. Learners then consider buyer behaviour and positioning.

The unit looks at the main elements of both the original and the extended marketing mix. This includes an introduction to the concept of the product life cycle, new product development, pricing strategies, distribution options and the promotion mix.

Finally, learners will develop their own marketing mixes to meet the needs of different target groups. This includes considering the differences when marketing services as opposed to goods. A range of other contexts is examined including marketing to businesses instead of consumers and the development of international markets.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the concept and process of marketing
2. Be able to use the concepts of segmentation, targeting and positioning
3. Understand the individual elements of the extended marketing mix
4. Be able to use the marketing mix in different contexts.



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## Unit content

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### 1. Understand the concept and process of marketing

*Definitions:* alternative definitions including those of the Chartered Institute of Marketing and the American Marketing Association; satisfying customer needs and wants; value and satisfaction; exchange relationships; the changing emphasis of marketing

*Marketing concept:* evolution of marketing; marketing orientations; societal issues and emergent philosophies; customer and competitor orientation; efficiency and effectiveness; limitations of the marketing concept

*Marketing process overview:* marketing audit; integrated marketing; environmental analysis; SWOT analysis; marketing objectives; constraints; options; plans to include target markets and marketing mix; scope of marketing

*Costs and benefits:* links between marketing orientation and building competitive advantage; benefits of building customer satisfaction; desired quality; service and customer care; relationship marketing; customer retention; customer profitability; costs of a too narrow marketing focus

### 2. Be able to use the concepts of segmentation, targeting and positioning

*Macro environment:* environmental scanning; political, legal, economic, socio-cultural, ecological and technological factors

*Micro environment:* stakeholders (organisation's own employees, suppliers, customers, intermediaries, owners, financiers, local residents, pressure groups and competitors); direct and indirect competitors; Porter's competitive forces

*Buyer behaviour:* dimensions of buyer behaviour; environmental influences; personal variables – demographic, sociological, psychological – motivation, perception and learning; social factors; physiological stimuli; attitudes; other lifestyle and life cycle variables; consumer and organisational buying

*Segmentation:* process of market selection; macro and micro segmentation; bases for segmenting markets, (geographic, demographic, psychographic and behavioural); multivariable segmentation and typologies; benefits of segmentation; evaluation of segments and targeting strategies; positioning; segmenting industrial markets; size; value; standards; industrial classification

*Positioning:* definition and meaning; influence over marketing mix factors



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## 3. Understand the individual elements of the extended marketing mix

*Product:* products and brands – features, advantages and benefits; the total product concept; product mix; product life cycle and its effect on other elements of the marketing mix; product strategy; new product development; adoption process

*Place:* customer convenience and availability; definition of channels; types and functions of intermediaries; channel selection; integration and distribution systems; franchising; physical distribution management and logistics; ethical issues

*Price:* perceived value; pricing context and process; pricing strategies; demand elasticity; competition; costs, psychological, discriminatory; ethical issues

*Promotion:* awareness and image; effective communication; integrated communication process (SOSTT + 4Ms); promotional mix elements; push and pull strategies; advertising above and below the line including packaging; public relations and sponsorship; sales promotion; direct marketing and personal selling; branding, internet and online marketing

*The shift from the 4Ps to the 7Ps:* product-service continuum; concept of the extended marketing mix; the significance of the soft elements of marketing (people, physical evidence and process management)

## 4. Be able to use the marketing mix in different contexts

*Consumer markets:* fast moving consumer goods; consumer durables; coordinated marketing mix to achieve objectives

*Organisational markets:* differences from consumer markets; adding value through service; industrial; non-profit making; government; re-seller

*Services:* nature and characteristics of service products (intangibility, ownership, inseparability, perishability, variability, heterogeneity – the 7Ps); strategies; service quality; elements of physical product marketing; tangible and intangible benefits

*International markets:* globalisation; cultural differences; standardisation versus adaptation; the EU; benefits and risks; market attractiveness; international marketing mix strategies





# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the concept and process of marketing	1.1 explain the various elements of the marketing process  1.2 evaluate the benefits and costs of a marketing orientation for a selected organisation
LO2 Be able to use the concepts of segmentation, targeting and positioning	2.1 show macro and micro environmental factors which influence marketing decisions  2.2 propose segmentation criteria to be used for products in different markets  2.3 choose a targeting strategy for a selected product/service  2.4 demonstrate how buyer behaviour affects marketing activities in different buying situations  2.5 propose new positioning for a selected product/service
LO3 Understand the individual elements of the extended marketing mix	3.1 explain how products are developed to sustain competitive advantage  3.2 explain how distribution is arranged to provide customer convenience  3.3 explain how prices are set to reflect an organisation's objectives and market conditions  3.4 illustrate how promotional activity is integrated to achieve marketing objectives  3.5 analyse the additional elements of the extended marketing mix
LO4 Be able to use the marketing mix in different contexts	4.1 plan marketing mixes for two different segments in consumer markets  4.2 illustrate differences in marketing products and services to businesses rather than consumers  4.3 show how and why international marketing differs from domestic marketing.

### **Essential requirements**

There are no essential or unique resources required for the delivery of this unit.



# Fairfield School of Business

## Unit 5: Aspects of Contract and Negligence for Business

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to provide learners with an understanding of aspects of the law of contract and tort and the skill to apply them, particularly in business situations.

- **Unit abstract**

The unit introduces the law of contract, with a particular emphasis on the formation and operation of business contracts. Learners are encouraged to explore the content of these agreements and then develop skills relating to the practical application of business contracts, including offer, acceptance, intention, consideration and capacity. Relevant case law examples will be covered. Learners will consider when liability in contract arises, the nature of the obligations on both sides of the contract, and the availability of remedies when a contract is not fulfilled in accordance with its terms.

Additionally, the unit will enable learners to understand how the law of tort differs from the law of contract and examine issues of liability in negligence relating to business and how to avoid it.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the essential elements of a valid contract in a business context
2. Be able to apply the elements of a contract in business situations
3. Understand principles of liability in negligence in business activities
4. Be able to apply the principles of liability in negligence in business situations.



# Fairfield School of Business

## Unit content

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### **1. Understand the essential elements of a valid contract in a business context**

*Essential elements:* offer and acceptance; intention to create legal relations; consideration; capacity; privity of contract (note vitiating factors are included in Unit 27: Further Aspects of Contract and Tort)

*Types of contract:* face to face; written; distance selling; impact

*Types of terms:* condition; warranty; innominate term; express; implied; exclusion clauses and their validity

### **2. Be able to apply the elements of a contract in business situations**

*Elements:* application of relevant principles and case law to business scenarios

*Specific terms:* contents of standard form business contracts; analysis of express terms, implied terms and exclusion clauses in a given contract

*Effect of terms:* breach of condition, warranty and innominate terms; legality of exemption clauses; outline of remedies; damages

### **3. Understand principles of liability in negligence in business activities**

*Negligence:* differences to contract; duty of care; breach of duty; damage – causation and remoteness of damage; personal injuries; damage to property; economic loss; occupier liability

*Liability:* employer's liability; vicarious liability; health and safety issues

### **4. Be able to apply principles of liability in negligence in business situations**

*Negligence:* application of the legal principles of negligence and relevant statutory and case law to business scenarios including: personal injuries, damage to property, economic loss, occupier liability; defences; contributory negligence; remedies



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b> <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b> <b>The learner can:</b>
LO1 Understand the essential elements of a valid contract in a business context	1.1 explain the importance of the essential elements required for the formation of a valid contract  1.2 discuss the impact of different types of contract  1.3 analyse terms in contracts with reference to their meaning and effect
LO2 Be able to apply the elements of a contract in business situations	2.1 apply the elements of contract in given business scenarios  2.2 apply the law on terms in different contracts  2.3 evaluate the effect of different terms in given contracts
LO3 Understand principles of liability in negligence in business activities	3.1 contrast liability in tort with contractual liability  3.2 explain the nature of liability in negligence  3.3 explain how a business can be vicariously liable
LO4 Be able to apply principles of liability in negligence in business situations	4.1 apply the elements of the tort of negligence and defences in different business situations  4.2 apply the elements of vicarious liability in given business situations.

### **Essential requirements**

Learners will require access to law reports and contractual documents, such as existing business standard form contracts.



# Fairfield School of Business

## Unit 6: Business Decision Making

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to give learners the opportunity to develop techniques for data gathering and storage, an understanding of the tools available to create and present useful information, in order to make business decisions.

- **Unit abstract**

In business, good decision making requires the effective use of information. This unit gives learners the opportunity to examine a variety of sources and develop techniques in relation to four aspects of information: data gathering, data storage, and the tools available to create and present useful information.

ICT is used in business to carry out much of this work and an appreciation and use of appropriate ICT software is central to completion of this unit. Specifically, learners will use spreadsheets and other software for data analysis and the preparation of information. The use of spreadsheets to manipulate numbers, and understanding how to apply the results, are seen as more important than the mathematical derivation of formulae used.

Learners will gain an appreciation of information systems currently used at all levels in an organisation as aids to decision making..

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Be able to use a variety of sources for the collection of data, both primary and secondary
2. Understand a range of techniques to analyse data effectively for business purposes
3. Be able to produce information in appropriate formats for decision making in an organisational context
4. Be able to use software-generated information to make decisions in an organisation.



# Fairfield School of Business

## Unit content

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### **1. Be able to use a variety of sources for the collection of data, both primary and secondary**

*Primary sources:* survey methodology; questionnaire design; sample frame; sampling methods; sample error

*Secondary sources:* internet research; government and other published data; by-product data

*Storage:* security of information; data protection issues; ethical issues

### **2. Understand a range of techniques to analyse data effectively for business purposes**

*Representative values:* mean, median, mode; calculation from raw data and frequency distributions using appropriate software; using the results to draw valid conclusions

*Measures of dispersion:* standard deviation for small and large samples; typical uses (statistical process eg control, buffer stock levels)

*Calculation:* use of quartiles, percentiles, correlation coefficient

### **3. Be able to produce information in appropriate formats for decision making in an organisational context**

*Creation and interpretation of graphs using spreadsheets:* line, pie, bar charts and histograms

*Scatter (XY) graphs and linear trend lines:* extrapolation for forecasting (reliability)

*Presentations and report writing:* use of appropriate formats; presentation software and techniques

### **4. Be able to use software-generated information to make decisions in an organisation**

*Management information systems:* computers and information processing tools for operational, tactical and strategic levels of the organisation

*Project management:* networking and critical path analysis, Gantt and Pert charts

*Financial tools:* net present value; discounted cash flow; internal rates of return



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Be able to use a variety of sources for the collection of data, both primary and secondary	1.1 create a plan for the collection of primary and secondary data for a given business problem  1.2 present the survey methodology and sampling frame used  1.3 design a questionnaire for a given business problem
LO2 Understand a range of techniques to analyse data effectively for business purposes	2.1 create information for decision making by summarising data using representative values  2.2 analyse the results to draw valid conclusions in a business context  2.3 analyse data using measures of dispersion to inform a given business scenario  2.4 explain how quartiles, percentiles and the correlation coefficient are used to draw useful conclusions in a business context
LO3 Be able to produce information in appropriate formats for decision making in an organisational context	3.1 produce graphs using spreadsheets and draw valid conclusions based on the information derived  3.2 create trend lines in spreadsheet graphs to assist in forecasting for specified business information  3.3 prepare a business presentation using suitable software and techniques to disseminate information effectively  3.4 produce a formal business report
LO4 Be able to use software generated information to make decisions in an organisation	4.1 use appropriate information processing tools  4.2 prepare a project plan for an activity and determine the critical path  4.3 use financial tools for decision making.

### **Essential requirements**

It is essential that learners have access to computers and the internet and specialist packages for statistical analysis and network planning.



# Fairfield School of Business

## Unit 7: Business Strategy

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to give learners the knowledge and understanding of how a business unit can strategically organise and plan for likely future outcomes in order to be successful.

- **Unit abstract**

One of the aims of this unit is to build on learners' existing knowledge of the basic tools of business analysis such as PESTLE and draw it together so that the learners think strategically.

Learners will be introduced to further analysis tools needed for the process of strategic planning. They will be able to explain the significance of stakeholder analysis and carry out an environmental and organisational audit of a given organisation.

Learners will learn how to apply strategic positioning techniques to the analysis of a given organisation and prepare a strategic plan based on previous analysis. They will also learn how to evaluate possible alternative strategies (such as substantive growth, limited growth or retrenchment) and then select an appropriate future strategy for a given organisation.

Finally, learners will compare the roles and responsibilities for strategy implementation and evaluate resource requirements for the implementation of a new strategy for a given organisation. Learners will then be able to propose targets and timescales for implementation and monitoring of the strategy in a given organisation.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the process of strategic planning
2. Be able to formulate a new strategy
3. Understand approaches to strategy evaluation and selection
4. Understand how to implement a chosen strategy.





# Fairfield School of Business

## Unit content

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### 1. Understand the process of strategic planning

*Strategic contexts and terminology:* role of strategy; missions; visions; strategic intent; objectives; goals; core competencies; strategic architecture; strategic control

*Strategic thinking:* future direction of the competition; needs of customers; gaining and maintaining competitive advantage; Ansoff's growth-vector matrix; portfolio analysis

*Planning systems:* informal planning; top-down planning; bottom-up planning; behavioural approaches

*Strategic planning issues:* impact on managers; targets; when to plan; who should be involved; role of planning

*Strategic planning techniques:* BCG growth-share matrix; directional policy matrices; SPACE, PIMS

### 2. Be able to formulate a new strategy

*Stakeholder analysis:* stakeholder significance grid; stakeholder mapping

*Environment auditing:* political, economic, socio-cultural, technological, legal and environmental analysis (PESTLE); Porter's 5 force analysis; the threat of new entrants; the power of buyers; the power of suppliers; the threat of substitutes; competitive rivalry and collaboration

*Strategic positioning:* the Ansoff matrix; growth; stability; profitability; efficiency; market leadership; survival; mergers and acquisitions; expansion into the global marketplace

*The organisational audit:* benchmarking; SWOT analysis; product positions; value-chain analysis; demographic influences; scenario planning; synergy culture and values

### 3. Understand approaches to strategy evaluation and selection

*Market entry strategies:* organic growth; growth by merger or acquisition; strategic alliances; licensing; franchising

*Substantive growth strategies:* horizontal and vertical integration; related and unrelated diversification

*Limited growth strategies:* do nothing; market penetration; market development; product development; innovation

*Disinvestment strategies:* retrenchment; turnaround strategies; divestment; liquidation



# Fairfield School of Business

*Strategy selection:* considering the alternatives; appropriateness; feasibility; desirability

## **4. Understand how to implement a chosen strategy**

*The realisation of strategic plans to operational reality:* communication (selling the concepts); project teams; identification of team and individual roles, responsibilities and targets; programme of activities; benchmark targets at differing levels of the organisation

*Resource allocation:* finance; human resources; materials; time

*Review and evaluation:* an evaluation of the benchmarked outcomes in a given time period in relation to corporate, operational and individual targets



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the process of strategic planning	1.1 explain strategic contexts and terminology – missions, visions, objectives, goals, core competencies  1.2 review the issues involved in strategic planning  1.3 explain different planning techniques
LO2 Be able to formulate a new strategy	2.1 produce an organisational audit for a given organisation  2.2 carry out an environmental audit for a given organisation  2.3 explain the significance of stakeholder analysis
LO3 Understand approaches to strategy evaluation and selection	3.1 analyse possible alternative strategies relating to substantive growth, limited growth or retrenchment  3.2 select an appropriate future strategy for a given organisation
LO4 Understand how to implement a chosen strategy	4.1 compare the roles and responsibilities for strategy implementation  4.2 evaluate resource requirements to implement a new strategy for a given organisation  4.3 discuss targets and timescales for achievement in a given organisation to monitor a given strategy.

### **Essential requirements**

There are no essential or unique resources required for the delivery of this unit.



# Fairfield School of Business

## Unit 8: Research Project

QCF Level 5: BTEC Higher National

Credit value: 20

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- **Aim**

To develop learners' skills of independent enquiry and critical analysis by undertaking a sustained research investigation of direct relevance to their Higher Education programme and professional development.

- **Unit abstract**

This unit is designed to enable learners to become confident using research techniques and methods. It addresses the elements that make up formal research including the proposal, a variety of research methodologies, action planning, carrying out the research itself and presenting the findings. To complete the unit satisfactorily, learners must also understand the theory that underpins formal research.

The actual research depends on the learner, the context of their area of learning, their focus of interest and the anticipated outcomes. The unit draws together a range of other areas from within the programme to form a holistic piece of work that will make a positive contribution to the learner's area of interest. Learners should seek approval from their tutors before starting their research project.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. 1 Understand how to formulate a research specification
2. 2 Be able to implement the research project within agreed procedures and to specification
3. 3 Be able to evaluate the research outcomes
4. 4 Be able to present the research outcomes.



# Fairfield School of Business

## Unit content

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### 1. Understand how to formulate a research specification

*Research formulation:* aims and objectives; rationale for selection; methodology for data collection and analysis; literature review; critique of references from primary sources eg questionnaires, interviews; secondary sources eg books, journals, internet; scope and limitations; implications eg resources

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

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

*Research design:* type of research eg qualitative, quantitative, systematic, original; methodology; resources; statistical analyses; validity; reliability; control of variables

### 2. Be able to implement the research project within agreed procedures and to specification

*Implement:* according to research design and method; test research hypotheses; considering test validity; reliability

*Data collection:* selection of appropriate tools for data collection; types eg qualitative, quantitative; systematic recording; methodological problems eg bias, variables and control of variables, validity and reliability

*Data analysis and interpretation:* qualitative and quantitative data analysis – interpreting transcripts; coding techniques; specialist software; statistical tables; comparison of variable; trends; forecasting

### 3. Be able to evaluate the research outcomes

*Evaluation of outcomes:* an overview of the success or failure of the research project planning, aims and objectives, evidence and findings, validity, reliability, benefits, difficulties, conclusion(s)

*Future consideration:* significance of research investigation; application of research results; implications; limitations of the investigation; improvements; recommendations for the future, areas for future research

### 4. Be able to present the research outcomes

*Format:* professional delivery format appropriate to the audience; use of appropriate media.



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand how to formulate a research specification	1.1 formulate and record possible research project outline specifications  1.2 identify the factors that contribute to the process of research project selection  1.3 undertake a critical review of key references  1.4 produce a research project specification  1.5 provide an appropriate plan and procedures for the agreed research specification
LO2 Be able to implement the research project within agreed procedures and to specification	2.1 match resources efficiently to the research question or hypothesis  2.2 undertake the proposed research investigation in accordance with the agreed specification and procedures  2.3 record and collate relevant data where appropriate
LO3 Be able to evaluate the research outcomes	3.1 use appropriate research evaluation techniques  3.2 interpret and analyse the results in terms of the original research specification  3.3 make recommendations and justify areas for further consideration
LO4 Be able to present the research outcomes	4.1 use an agreed format and appropriate media to present the outcomes of the research to an audience.

### **Essential requirements**

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



# Fairfield School of Business

## Unit 9: Management Accounting: Costing and Budgeting

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to provide learners with the understanding and ability to use cost information for budgeting and forecasting purposes in the management of business.

- **Unit abstract**

This unit looks at the cost information, both current and future, of businesses. It looks at how cost data is collected, compiled and analysed, and processed into information that is useful for business managers. Learners will have the opportunity to apply these principles to practice.

The unit then deals with budgetary planning and control. It looks at how to prepare forecasts and budgets and to compare these to actual business results. Learners will again have practical experience of this.

Finally, the unit considers different costing and budgetary systems and the causes of resulting variances, together with the possible implications and the corrective action the business will need to take.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Be able to analyse cost information within a business
2. Be able to propose methods to reduce costs and enhance value within a business
3. Be able to prepare forecasts and budgets for a business
4. Be able to monitor performance against budgets within a business.



# Fairfield School of Business

## Unit content

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### 1. Be able to analyse cost information within a business

*Types of costs and classification:* materials; labour; overheads; direct and indirect; fixed; variable and semi-variable

*Costing methods:* job costing; batch costing; process costing; contract costing; service costing

*Cost measurement:* absorption and marginal costing; traditional overhead absorption and activity-based costing; stock valuation methods (FIFO, LIFO, AVCO, standard costing)

*Costing as basis for pricing and stock valuation:* cost plus pricing; market pricing; target costing

*Data collection and analysis:* sampling methods and purpose; presentation of data eg tabular, diagrammatical, graphical; index numbers

### 2. Be able to propose methods to reduce costs and enhance value within a business

*Cost reports:* preparation; comparison with other data; explanation and implication of variances

*Performance indicators:* monitor and assess to identify potential improvements

*Quality and value:* definitions and interaction; added value; total quality management

### 3. Be able to prepare forecasts and budgets for a business

*The budgeting process:* purpose; benefits; links with organisational objectives/strategy; the budget manual; budgets as planning, coordinating, motivation and control devices

*Budget preparation:* limiting or key factors; master, subsidiary and functional budgets; cash budgets; the preparation of sales budget, debtors' budgets, creditors' budgets, production costs, raw materials and finished goods budgets

*Budgeting methods:* incremental; zero-based; fixed and flexible

*Behavioural consequences of budgets:* padding the budget; spending to budget; creative budgets

### 4. Be able to monitor performance against budgets within a business

*Variances:* types; analysis; calculation; possible causes; corrective action

*Reporting:* operating statement; reconciliation of budgeted and actual results

*Responsibility centres:* relevance to budgeting; identification of responsibility for variances





# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Be able to analyse cost information within a business	1.1 classify different types of cost  1.2 use different costing methods  1.3 calculate costs using appropriate techniques  1.4 analyse cost data using appropriate techniques
LO2 Be able to propose methods to reduce costs and enhance value within a business	2.1 prepare and analyse routine cost reports  2.2 use performance indicators to identify potential improvements  2.3 suggest improvements to reduce costs, enhance value and quality
LO3 Be able to prepare forecasts and budgets for a business	3.1 explain the purpose and nature of the budgeting process  3.2 select appropriate budgeting methods for the organisation and its needs  3.3 prepare budgets according to the chosen budgeting method  3.4 prepare a cash budget
LO4 Be able to monitor performance against budgets within a business	4.1 calculate variances, identify possible causes and recommend corrective action  4.2 prepare an operating statement reconciling budgeted and actual results  4.3 report findings to management in accordance with identified responsibility centres.

### **Essential requirements**

There are no essential or unique resources required for the delivery of this unit.



# Fairfield School of Business

## Unit 10: Financial Accounting and Reporting

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

In this unit learners will prepare financial statements for different types of business, complying with relevant legal and regulatory provisions and the basic principles of group accounts. Learners will also develop tools for the interpretation of financial statements.

- **Unit abstract**

It is essential for the success of any business that it has good financial control and record keeping. Lack of effective control, planning and recording can ultimately lead to poor financial results. Owners and managers need to be able to recognise the indications of potential difficulties and take remedial action when required.

The unit considers the current regulations governing financial reporting, the formats of financial statements and the purpose of these statements for different users.

Learners will use records to complete financial statements. They will consider various categories of business income and expenditure and use cash flow forecasts, monitoring and adjusting for the effective management of cash flow. They will measure financial performance using a profit and loss account and balance sheet and analyse the profitability, liquidity and efficiency of a business through the application of ratio analysis.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the regulatory framework for financial reporting.
2. Be able to prepare financial statements from complete or incomplete records
3. Be able to present financial information in accepted formats for publication
4. Be able to interpret financial statements.



# Fairfield School of Business

## Unit content

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### 1. Understand the regulatory framework for financial reporting

*User groups:* owners; managers; employees; suppliers; customers; lenders; government; potential investors; different needs from financial statements

*User needs:* profitability; liquidity; gearing; cash flow; job security; Accounting Standards Board (ASBs) statement of principles; International Accounting Standards Board (IASBs) framework for the presentation of financial statements

*Legislation:* current legislation including Companies Acts 1985, 1989 and 2006; Partnership Act 1890; European directives

*Other regulations:* International Accounting Standards (IASs); International Financial Reporting Standards and the main differences from UK Statements of Standard Accounting Practice (SSAPs) and Financial Reporting Standards (FRSs); The Accounting Standards Board (ASB)

### 2. Be able to prepare financial statements from complete or incomplete records

*Statements:* trial balance; assets, liabilities, income, expenses, capital; profit and loss accounts; balance sheet; cash flow statement; notes to the accounts; statement of recognised gains and losses; international equivalents under the International Accounting Standards (IAS)

*Types of business:* sole trader; partnership; limited company (public and private); manufacturing/service/retail, group of companies

*Preparation:* from trial balance with adjustments eg stock, prepayments, accruals, bad debts, depreciation; from incomplete records; basic consolidation of accounts; changes to reporting requirements under the International Accounting Standards (IAS) eg statement of comprehensive income, statement of financial position

### 3. Be able to present financial information in accepted formats for publication

*Types of business:* different formats for the businesses described in learning outcome 2 above; annual report

*Formats:* requirements of law and generally accepted accounting practice; changes to reporting requirements under the International Accounting Standards (IAS)

### 4. Be able to interpret financial statements

*Ratios:* calculate ratios to reflect profitability, liquidity, efficiency, gearing, investment; comparison of these ratios both externally (other companies, industry standards) and internally (previous periods); interpretation of results

*Reporting:* present findings in a format appropriate to users; weaknesses and limitations of analysis



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the regulatory framework for financial reporting	1.1 describe the different users of financial statements and their needs  1.2 explain the legal and regulatory influences on financial statements  1.3 assess the implications for users  1.4 explain how different laws/regulations are dealt with by accounting and reporting standards
LO2 Be able to prepare financial statements from complete or incomplete records	2.1 prepare financial statements for a variety of businesses from a trial balance, making appropriate adjustments  2.1 prepare financial statements from incomplete records  2.3 prepare a consolidated balance sheet and profit and loss account for a simple group of companies
LO3 Be able to present financial information in accepted formats for publication	3.1 explain how the information needs of different user groups vary  3.2 prepare financial statements in a form suitable for publication by a sole trader, partnership and limited company
LO4 Be able to interpret financial statements	4.1 calculate accounting ratios to assess the performance and position of a business  4.2 prepare a report incorporating and interpreting accounting ratios, including suitable comparisons.

### **Essential requirements**

Published financial reports of public limited companies are essential and are available from the companies themselves, or from the free online service provided by The Financial Times.



# Fairfield School of Business

## Unit 11: Financial Systems and Auditing

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to enable learners to develop understanding and skills in the management of business accounting systems and the conduct and reporting of audits.

- **Unit abstract**

In this unit learners will develop skills to evaluate the accounting systems of a business, using both computerised and manual records, and apply fundamental concepts. Learners will also analyse the management control systems of a business and evaluate their effectiveness, particularly in terms of controls and safeguards against error and fraud.

This unit will also enable learners to develop audit skills by contributing to the planning and performance of an audit and the preparation of an audit report.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

- 1 Understand the importance of keeping effective accounting systems within a business
- 2 Be able to analyse the management control systems of a business
- 3 Be able to contribute to the planning and conduct of an audit assignment
- 4 Be able to prepare audit reports.



# Fairfield School of Business

## Unit content

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### **1. Understand the importance of keeping effective accounting systems within a business**

*Accounting records:* books of prime entry (daybooks); accounts and ledgers (sales, purchases, nominal/general); trial balance; final accounts

*Fundamental accounting concepts:* accruals; prudence; consistency; going concern; materiality; business entity

*Accounting systems:* manual and computerised; effect of business size and structure

### **2. Be able to analyse the management control systems of a business**

*Business risk:* types eg operational, financial, compliance; identification of risk and responsibility for risk management; influences on corporate governance eg Cadbury Code

*Control:* control systems and procedures within the business eg segregation of duties, authorisation

*Fraud:* types; implications; detection

### **3. Be able to contribute to the planning and conduct of an audit assignment**

*Regulatory environment:* legal duties and status of auditors; liability of auditors; auditing standards and guidelines

*Role of the auditor:* internal and external audit and the relationship between the two; responsibilities of management as opposed to auditors

*Audit planning:* scope; materiality; risk

*Audit testing:* systems based (compliance) and substantive testing; sampling methods eg random, stratified, systematic; confidence intervals

*Records:* audit files and working papers; checklists and programmes; flow charts and questionnaires

### **4. Be able to prepare audit reports**

*Statutory reports:* purpose; content (opinion of auditor), qualified and unqualified, types of qualification

*Management letters:* purpose and content



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>	<b>Assessment criteria for pass</b>
<b>On successful completion of this unit a learner will:</b>	<b>The learner can:</b>
LO1 Understand the importance of keeping effective accounting systems within a business	1.1 explain the purpose and use of the different accounting records  1.2 assess the importance and meaning of the fundamental accounting concepts  1.3 evaluate the factors which influence the nature and structure of accounting systems
LO2 Be able to analyse the management control systems of a business	2.1 identify the different components of business risk  2.2 analyse the control systems in place in a business  2.3 evaluate the risk of fraud within a business suggesting methods for detection
LO3 Be able to contribute to the planning and conduct of an audit assignment	3.1 plan an audit with reference to scope, materiality and risk  3.2 identify and use appropriate audit tests  3.3 record the audit process in an appropriate manner
LO4 Be able to prepare audit reports	4.1 prepare a draft audit report  4.2 draft suitable management letters in relation to a statutory audit.

### **Essential requirements**

There are no essential or unique resources required for the delivery of this unit.



# Fairfield School of Business

## Unit 12: Taxation

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

This unit aims to give learners an understanding of the taxation of individuals and limited companies in the United Kingdom.

- **Unit abstract**

Learners will understand the need for taxation and may already be familiar with the calculation and collection of income tax through the Pay as You Earn system applied to employees.

The unit introduces learners to the UK tax environment and explores the administration and collection of taxation in the UK and the duties of the tax practitioner.

The unit gives learners the skills needed to understand and compute the calculation of income tax for both individuals and businesses. Learners will then consider the liability for and computation of corporation tax and capital gains tax.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

- 1 Understand the duties and responsibilities of the tax practitioner in the UK tax environment
- 2 Be able to calculate personal tax liabilities for individuals and partnerships
- 3 Be able to calculate corporation tax liabilities for companies
- 4 Be able to calculate capital gains tax payable for individuals and businesses.





# Fairfield School of Business

## Unit content

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### **1. Understand the duties and responsibilities of the tax practitioner in the UK tax environment**

*UK tax environment:* purpose and types of taxation (income tax, corporation tax, capital gains tax and inheritance); different methods of collection; tax legislation

*Tax practitioner:* dealing with the Inland Revenue; advising clients; calculating liabilities; implications for non-payment; respecting confidentiality and seeking advice when needed

### **2. Be able to calculate personal tax liabilities for individuals and partnerships**

*Sources of income:* income from employment including benefits in kind; income from self-employment eg sole trader or partnership; income from investments

*Tax computations:* relevant and allowable expenses; charges on income; payments to charities; tax free allowances; tax rates and payment dates

*Tax of the self-employed:* bases of assessment; adjustment of profits and losses eg disallowed expenditure; tax losses; capital expenditure and allowances

*Documentation:* tax returns, P60, P45 and P11D

### **3. Be able to calculate corporation tax liabilities for companies**

*Bases of assessment:* scope of corporation tax; accounting periods; chargeable profits; due dates

*Computation:* adjusted profits; treatment of losses; corporation tax rates; capital expenditure and allowances; treatment of income tax deductions

### **4. Be able to calculate capital gains tax payable for individuals and businesses**

*Incidence and administration of capital gains tax:* chargeable persons; assets and disposals; payment dates

*Computation:* layout of computation; allowable expenditure; indexation allowance and taper relief; dealing with losses; allowances; rates/assets/disposals



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b> <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b> <b>The learner can:</b>
LO1 Understand the duties and responsibilities of the tax practitioner in the UK tax environment	1.1 describe the UK tax environment 1.2 analyse the role and responsibilities of the tax practitioner 1.3 explain the tax obligations of tax payers or their agents and the implications of non-compliance
LO2 Be able to calculate personal tax liabilities for individuals and partnerships	2.1 calculate relevant income, expenses and allowances 2.2 calculate taxable amounts and tax payable for employed and self employed individuals and payment dates 2.3 complete relevant documentation and tax returns
LO3 Be able to calculate corporation tax liabilities for companies	3.1 calculate chargeable profits 3.2 calculate tax liabilities and due payment dates 3.3 explain how income tax deductions are dealt with
LO4 Be able to calculate capital gains tax payable for individuals and businesses	4.1 identify chargeable assets 4.2 calculate capital gains and losses 4.3 calculate capital gains tax payable.

### **Essential requirements**

There are no essential or unique resources required for the delivery of this unit.



# Fairfield School of Business

## Unit 13: Personal and Professional Development

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

This unit aims to help the learner become an effective and confident self-directed employee. This helps the learner become confident in managing own personal and professional skills to achieve personal and career goals.

- **Unit abstract**

This unit is designed to enable learners to assess and develop a range of professional and personal skills in order to promote future personal and career development. It also aims to develop learners' ability to organise, manage and practise a range of approaches to improve their performance as self-directed learners in preparation for work or further career development.

The unit emphasises the needs of the individual but within the context of how the development of self-management corresponds with effective team management in meeting objectives.

Learners will be able to improve their own learning, be involved in teamwork and be more capable of problem solving through the use of case studies, role play and real-life activities.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand how self-managed learning can enhance lifelong development
2. Be able to take responsibility for own personal and professional development
3. Be able to implement and continually review own personal and professional development plan
4. Be able to demonstrate acquired interpersonal and transferable skills.



# Fairfield School of Business

## Unit content

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### 1. Understand how self-managed learning can enhance lifelong development

*Self-managed learning:* self-initiation of learning processes; clear goal setting, eg aims and requirements, personal orientation achievement goals, dates for achievement, self-reflection

*Learning styles:* personal preferences; activist; pragmatist; theorist; reflector, eg reflexive modernisation theory; Kolb's learning cycle

*Approaches:* learning through research; learning from others, eg mentoring/coaching, seminars, conferences, secondments, interviews, use of the internet, social networks, use of bulletin boards, news groups

*Effective learning:* skills of personal assessment; planning, organisation and evaluation

*Lifelong learning:* self-directed learning; continuing professional development; linking higher education with industry, further education, Recognition of Prior Learning, Apprenticeships, Credit Accumulation and Transfer Schemes

*Assessment of learning:* improved ability range with personal learning; evidence of improved levels of skill; feedback from others; learning achievements and disappointments

### 2. Be able to take responsibility for own personal and professional development

*Self-appraisal:* skills audit (personal profile using appropriate self-assessment tools); evaluating self-management; personal and interpersonal skills; leadership skills

*Development plan:* current performance; future needs; opportunities and threats to career progression; aims and objectives; achievement dates; review dates; learning programme/activities; action plans; personal development plan

*Portfolio building:* developing and maintaining a personal portfolio

*Transcripts:* maintaining and presenting transcripts including curriculum vitae



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## **3. Be able to implement and continually review own personal and professional development plan**

*Learning styles and strategies:* types of styles; awareness of own personal style; impact of personal style and interactions with others

*Learning from others:* formal learning and training; observation; mentoring; supervision; tutorials; informal networks; team members; line managers; other professionals

*Evaluation of progress:* setting and recording of aims and objectives; setting targets; responding to feedback; re-setting aims and targets; establishing and recognising strengths and weaknesses; directions for change; cycles of activity (monitoring, reflecting and planning)

## **4. Be able to demonstrate acquired interpersonal and transferable skills**

*Transferable skills:* personal effectiveness (ability to communicate effectively at all levels, initiative, self-discipline, reliability, creativity, problem solving)

*Verbal and non-verbal communication:* effective listening, respect for others' opinions; negotiation; persuasion; presentation skills; assertiveness; use of ICT

*Delivery formats:* ability to deliver transferable skills using a variety of formats

*Working with others:* team player; flexibility/adaptability; social skills

*Time management:* prioritising workloads; setting work objectives; using time effectively; making and keeping appointments; reliable estimates of task time



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>	<b>Assessment criteria for pass</b>
<b>On successful completion of this unit a learner will:</b>	<b>The learner can:</b>
LO1 Understand how self-managed learning can enhance lifelong development	1.1 evaluate approaches to self-managed learning 1.2 propose ways in which lifelong learning in personal and professional contexts could be encouraged 1.3 evaluate the benefits of self-managed learning to the individual and organisation
LO2 Be able to take responsibility for own personal and professional development	2.1 evaluate own current skills and competencies against professional standards and organisational objectives 2.2 identify own development needs and the activities required to meet them 2.3 identify development opportunities to meet current and future defined needs 2.4 devise a personal and professional development plan based on identified needs
LO3 Be able to implement and continually review own personal and professional development plan	3.1 discuss the processes and activities required to implement the development plan 3.2 undertake and document development activities as planned 3.3 reflect critically on own learning against original aims and objectives set in the development plan 3.4 update the development plan based on feedback and evaluation
LO4 Be able to demonstrate acquired interpersonal and transferable skills	4.1 select solutions to work-based problems 4.2 communicate in a variety of styles and appropriate manner at various levels 4.3 evaluate and use effective time management strategies.



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## Essential requirements

Activities carried out in this unit could be part of the mainstream academic activity and could be integrated into the whole programme of study. Learners would benefit from links with the learning outcomes of other units and if review meetings are held regularly.

A personal development portfolio or progress file should be put together, which contains all information and personal records 'owned' by the learner, including planning and monitoring progress towards the achievement of personal objectives. This could be web based, paper based or another format. Potentially this could form the basis of an extended record of a lifelong record of learning and achievement.

Tutors should be aware that textbooks are updated frequently and that they should use the latest editions where available. This is a practical unit and textbook materials should be used for reference purposes.



# Fairfield School of Business

## Unit 14: Working with and Leading People

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to develop the skills and knowledge needed for working with and leading others, through understanding the importance of recruiting the right people for the job.

- **Unit abstract**

An organisation's success depends very much on the people working in it, and recruiting the right people is a key factor. Organisations with effective recruitment and selection processes and practices in place are more likely to make successful staffing appointments. In competitive labour markets this is a major advantage that well-organised businesses will have over their competitors. It is important, therefore, for learners to appreciate that the processes and procedures involved in recruitment and selection to meet the organisation's human resource needs are legal. This unit aims to develop learner knowledge and understanding of the impact of the regulatory framework on the recruitment process.

There are many benefits for both the individual and the organisation of working in teams for both the individual and the organisation, most importantly that the task is carried out better and more efficiently. An understanding of team development and the leadership function is crucial when working with others. A motivated workforce is more likely to be efficient and can contribute to the long-term profitability of the business. In this unit learners will examine these key areas and appreciate how an effective team leader can motivate and develop individuals within teams.

Sometimes when people work in teams they have their own types of communication, which can affect others and cause conflict or tension. In this unit learners will have the opportunity to develop their own leadership skills as well as building on the skills and knowledge needed to manage and lead people and teams in an organisation. Learners will explore ways to manage teams and individuals as well as motivating staff to perform better whilst meeting the aims of the organisation.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Be able to use recruitment, selection and retention procedures
2. Understand the styles and impact of leadership
3. Be able to work effectively in a team
4. Be able to assess the work and development needs of individuals.





# Fairfield School of Business

## Unit content

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### 1. Be able to use recruitment, selection and retention procedures

*Legislation and requirements relating to recruitment and selection:* internal and external recruitment processes; selection processes including job descriptions, person specifications, interviewing, use of CVs, assessment centres; diversity issues, including legal requirements and obligations and business and ethical cases regarding diversity; legislation and requirements relating to employment, workers' welfare and rights, health and safety, retention, succession planning

### 2. Understand the styles and impact of leadership

*Theories, models and styles of leadership and their application to different situations:* impact of leadership styles; theories and practices of motivation eg Maslow, McGregor, Herzberg; influencing and persuading others; influence of cultural environment within the organisation; differences between leadership and management; leadership power and control eg French and Raven; delegation; emotional intelligence eg Higgs and Dulewicz

### 3. Be able to work effectively in a team

*Teamworking and development:* flexible working practices; team formation eg Tuckman, structures and interactions eg Belbin's Team Role Theory, Adair's Action Centred Leadership model; benefits of team working; politics of working relationships; diversity issues; working cultures and practices; promotion of anti-discriminatory practices and behaviours; team building processes; conflict resolution; delegation and empowerment; coaching, support, mentoring; training, supervision, monitoring and evaluation

### 4. Be able to assess the work and development needs of individuals

*Identifying development needs:* learning styles and processes; supporting individual learning and encouraging lifelong learning; planning, recording, monitoring and evaluating; group development processes and behaviour

*Planning, work orientation and job design:* application of motivation theories and empowerment techniques; communication styles and techniques; delegation techniques and processes; supervision styles, working culture and practices, regulations and codes of practice, diversity issues

*Performance monitoring and assessment:* measuring effective performance; providing feedback; appraisal processes; benchmarking performance processes; mentoring and counselling; methods of correcting under-performance; legislation, codes of practice and procedures relating to disciplinary situations; diversity issues; management principles; promotions of anti-discriminatory practices and behaviours



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>	<b>Assessment criteria for pass</b>
<b>On successful completion of this unit a learner will:</b>	<b>The learner can:</b>
LO1 Be able to use recruitment, selection and retention procedures	1.1 prepare documentation to select and recruit a new member of staff 1.2 assess the impact of legal, regulatory and ethical considerations to the recruitment and selection process 1.3 take part in the selection process 1.4 evaluate own contribution to the selection process
LO2 Understand the styles and impact of leadership	2.1 explain the skills and attributes needed for leadership 2.2 explain the difference between leadership and management 2.3 compare leadership styles for different situations 2.4 explain ways to motivate staff to achieve objectives
LO3 Be able to work effectively in a team	3.1 assess the benefits of team working for an organisation 3.2 demonstrate working in a team as a leader and member towards specific goals, dealing with any conflict or difficult situations 3.3 review the effectiveness of the team in achieving the goals
LO4 Be able to assess the work and development needs of individuals	4.1 explain the factors involved in planning the monitoring and assessment of work performance 4.2 plan and deliver the assessment of the development needs of individuals 4.3 evaluate the success of the assessment process.

### **Essential requirements**

There are no essential or unique resources required for the delivery of this unit.



# Fairfield School of Business

## Unit 15: Managing Business Activities to Achieve Results

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to provide learners with the understanding and skills to manage their activities in the business workplace to improve their effectiveness and efficiency.

- **Unit abstract**

This unit focuses on the effective and efficient planning and management of business work activities. It gives learners with understanding and skills needed to design and implement operational systems to improve their effectiveness and efficiency and achieve the desired results for the business.

Learners are encouraged to consider the importance and interrelationship of business processes and the implementation of operational plans, together with quality systems and health and safety, in achieving satisfactory results.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the importance of business processes in delivering outcomes based upon business goals and objectives
2. Be able to develop plans for own area of responsibility to implement operational plans
3. Be able to monitor appropriate systems to improve organisational performance
4. Be able to manage health and safety in the workplace.



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## **Unit content**

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### **1. Understand the importance of business processes in delivering outcomes based upon business goals and objectives**

*Functions:* interrelationships of functions, mission, aims, objectives and culture; interrelationship with processes

*Processes:* principles and models of effective process management; types of business process measures, output; quality gateways; how to evaluate suitability

### **2. Be able to develop plans for own area of responsibility to implement operational plans**

*Areas of responsibility:* internal and external customers; customer orientation; market research; product development, principles and methods of short- to medium-term planning; designing plans; PERT; critical path analysis; work flow, prioritising workloads; how to develop SMART objectives; time management; how to analyse and manage risk; how to align resources with objectives; legal, regulatory and ethical requirements

*Operational plans:* product and service specifications and standards; meeting quality, quantity, time and cost objectives; systems eg Just-in-Time; value-added chains; statistical process control; coordinating activities; working within organisational constraints and limitations

### **3. Be able to monitor appropriate systems to improve organisational performance**

*Systems:* Total Quality Management (TQM), TQM philosophy, principles, methods and techniques; quality systems, quality circles, ISO9000/EN29000 or subsequent current amendments, managing and monitoring quality

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

### **4. Be able to manage health and safety in the workplace**

*Health and safety:* legislation and regulations relating to health and safety at work; organisational policies and procedures regarding health and safety; risk assessment and monitoring; practical application of regulations; public attitudes and concerns relating to health and safety



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the importance of business processes in delivering outcomes based upon business goals and objectives	1.1 evaluate the interrelationship between the different processes and functions of the organisation  1.2 justify the methodology to be used to map processes to the organisation's goals and objectives  1.3 evaluate the output of the process and the quality gateways
LO2 Be able to develop plans for own area of responsibility to implement operational plans	2.1 design plans which promote goals and objectives for own area of responsibility  2.2 write objectives, which are specific, measurable, achievable, realistic and time-based to align people and other resources in an effective and efficient way  2.3 implement appropriate systems to achieve objectives in the most efficient way, on time, to budget and meeting organisational standards of quality  2.4 carry out work activities meeting the operational plan through effective monitoring and control
LO3 Be able to monitor appropriate systems to improve organisational performance	3.1 design systems to manage and monitor quality standards specified by the organisation  3.2 demonstrate a quality culture to ensure continuous monitoring, evaluation and development of the process  3.3 recommend improvements which align with the organisation's objectives and goals and which result in improvements  3.4 report on the wider implications of proposed changes within the organisation



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LO4 Be able to manage health and safety in the workplace	4.1 carry out risk assessments as required by legislation, regulation and organisational requirements ensuring appropriate action is taken  4.2 demonstrate that health and safety regulations and legislation applicable in specific work situations are correctly and effectively applied  4.3 carry out a systematic review of organisational health and safety policies and procedures in order to ensure they are effective and compliant  4.4 carry out practical application of health and safety policies and procedures in the workplace.
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## Essential requirements

Tutors must build a bank of resource materials to ensure there is a sufficient supply of relevant information across a range of activities and processes..



# Fairfield School of Business

## Unit 16: Managing Communications, Knowledge and Information

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to show how communications, knowledge and information can be improved within an organisation including making better use of IT systems.

- **Unit abstract**

This unit recognises that communications do not automatically take place effectively in organisations and that both information and work-based knowledge is often insufficient when decisions are made. Learners will look at how managers can improve the planning of their communications processes as well as their communication skills. Learners will understand why managers need to adopt a more inclusive approach to stakeholders affected by the decisions they make and why they need to network on a more structured basis. The unit also looks at how managers can make the information and knowledge they gain accessible to other parts of the organisation.

The unit is designed to develop learner understanding of the interaction between communications, knowledge and information. It also covers how IT systems can be used as a management tool for collecting, storing, disseminating and providing access to knowledge and information..

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand how to assess information and knowledge needs
2. Be able to create strategies to increase personal networking to widen involvement in the decision-making process
3. Be able to develop communication processes
4. Be able to improve systems relating to information and knowledge.



# Fairfield School of Business

## Unit content

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### **1. Understand how to assess information and knowledge needs**

*Sources:* internal and external, primary and secondary, formal and informal, team workers, customers and other stakeholders

*Types:* qualitative and quantitative, tacit and explicit, official and unofficial, policy and opinion

### **2. Be able to create strategies to increase personal networking to widen involvement in the decision-making process**

*Sources:* stakeholders and useful contacts, internal and external

*Methods:* formal, informal

*Strategies:* formal and informal, direct or via media, relating and interacting, trust and confidentiality, forming business relationships, decision making and decision taking

### **3 Be able to develop communication processes**

*Types:* meetings and conferences, workshops and training events, internet and email, written, telephone, video conferencing, one-to-one meetings

*Approaches:* structured and coordinated, planned, formal and informal

*Strategy:* advantages, disadvantages; informal, face-to-face, formal in writing, emotional, intelligence

### **4. Be able to improve systems relating to information and knowledge**

*Type:* hard and soft, websites and mailings, access and dissemination

*Style:* trends and patterns, diagrams and text, consistent and reliable, current and valid; legal and confidential





# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b> <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b> <b>The learner can:</b>
LO1 Understand how to assess information and knowledge needs	1.1 discuss the range of decisions to be taken 1.2 examine the information and knowledge needed to ensure effective decision taking 1.3 assess internal and external sources of information and understanding 1.4 justify recommendations for improvement
LO2 Be able to create strategies to increase personal networking to widen involvement in the decision making process	2.1 identify stakeholders for a decision-making process 2.2 make contact with those identified and develop business relationships 2.3 involve those identified in the decision making as appropriate 2.4 design strategies for improvement
LO3 Be able to develop communication processes	3.1 report on existing processes of communication in an organisation 3.2 design ways to improve appropriateness 3.3 implement improvements to ensure greater integration of systems of communication in that organisation 3.4 create a personal plan to improve own communication skills
LO4 Be able to improve systems relating to information and knowledge	4.1 report on existing approaches to the collection, formatting, storage and dissemination of information and knowledge 4.2 carry out appropriate changes to improve the collection, formatting, storage and dissemination of information and knowledge 4.3 implement a strategy to improve access to systems of information and knowledge.

### **Essential requirements**

There are no essential or unique resources required for the delivery of this unit.



# Fairfield School of Business

## Unit 17: Marketing Intelligence

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to enable learners to understand the purchase decision-making process and how marketing research techniques are used to contribute to the development of marketing plans.

- **Unit abstract**

This unit explores buyer behaviour and how this is influenced by a range of factors and situations.

Learners will explore the marketing research process and assess the importance of different types of information. The approach is practical and learners will learn how to prepare and present a research proposal, assess the reliability of market research findings, and use secondary sources of data.

Learners will then develop the skills needed to assess trends and carry out competitor analysis.

Finally, learners will consider customer relationship management and how to assess levels of customer satisfaction.

The unit seeks to combine a sound theoretical framework with the development of useful business skills.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand buyer behaviour and the purchase decision-making process
2. Be able to use marketing research techniques
3. Be able to assess market size and future demand
4. Be able to measure customer satisfaction.



# Fairfield School of Business

## Unit content

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### 1. Understand buyer behaviour and the purchase decision-making process

*Customers and markets:* purchase decision-making process; buying situations and types of buying decision; dimensions of buyer behaviour

*Buyer behaviour:* influences on buyer behaviour; stimulus response model; models of purchase behaviour; diffusion and innovation; model unitary and decision-making units

*Buying motives:* psychological factors, socio-psychological factors, sociological factors, economic factors and cultural factors influencing customer behaviour; lifestyle and life-cycle factors; customer and prospect profiling

*Branding:* relationship between brand loyalty, company image and repeat purchase

### 2. Be able to use marketing research techniques

*Market research:* role and importance of marketing research; research process, objectives; issues relating to the use of primary and secondary data sources and methods; existing sources of primary and secondary market research; internal sources; external sources; competitor data and sources and customer data; ethics

*Market research companies:* benefits and limitations of use; cost; reliability and types

*Research techniques:* stages of the market research process; research proposals; qualitative and quantitative methods; surveys; sources of information; value and interpretation of data

*Types:* face to face, telephone/postal; data mining technique; focus groups; depth interviews; omnibus survey; psychological research; mystery shopper; sales, price and distribution research

*Reliability of research:* validity; sampling process; sample size; sample and interviewer bias; methods of recruitment

*Researching developing and established markets:* issues associated with researching the developing as well as the established consumer; industrial and service markets

*Use of research data:* research data supporting marketing planning; producing actionable recommendations; evaluating research findings for business decision making



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## **3. Be able to assess market size and future demand**

*Measuring:* defining the market; estimating total market size, value and volume; growth and trends; forecasting future demand

*Competitive analysis:* competitor analysis – market/product profiles of competition, brand and market share; characteristics of the competition – market innovator/follower; objectives of the competition; strategies of the competition; strengths and weakness of competition; future behaviour of the competition and their strategic intent

## **4. Be able to measure customer satisfaction**

*Measuring customer satisfaction:* post-sale surveys; data mining – web behaviour analysis; guarantees; complaint handling and suggestion systems; mystery shopping; product placement; service agreements; customer follow-up

*Customer care:* customer relationship management programmes, objectives, use and value in data collection, customer relationship management as a means of adding value and influencing purchase/repeat purchase behaviour, customer retention



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand buyer behaviour and the purchase decision making process	1.1 describe the main stages of the purchase decision making process  1.2 explain theories of buyer behaviour in terms of individuals and markets  1.3 explain the factors that affect buyer behaviour  1.4 evaluate the relationship between brand loyalty, corporate image and repeat purchasing
LO2 Be able to use marketing research techniques	2.1 evaluate different types of market research techniques  2.2 use sources of secondary data to achieve marketing research objectives  2.3 assess the validity and reliability of market research findings  2.4 prepare a marketing research plan to obtain information in a given situation
LO3 Be able to assess market size and future demand	3.1 assess market size trends within a given market  3.2 plan and carry out a competitor analysis for a given organisation  3.3 evaluate an organisation's opportunities and threats for a given product or service
LO4 Be able to measure customer satisfaction	4.1 evaluate techniques of assessing customer response  4.2 design and complete a customer satisfaction survey  4.3 review the success of a completed survey.

### **Essential requirements**

Learners need access to market research and business information.



# Fairfield School of Business

## Unit 18: Advertising and Promotion in Business

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to provide learners with the understanding and skills for using advertising, promotion and marketing communications effectively. Learners will put this into practice by planning an integrated promotional strategy.

- **Unit abstract**

The effective use of advertising and promotion is a fundamental requirement for any business seeking to succeed in the modern business world. As they progress through the unit, learners will build up their understanding of advertising and promotion, which they can use to plan an integrated promotional strategy for a business or product.

The unit introduces learners to the wide scope of marketing communications and how the communications process operates. It includes a study of current trends and the impact that ICT has had on marketing communications. Learners will explore the marketing communications industry and how it operates. They will also develop some knowledge of how the industry is regulated to protect consumers.

Advertising and the use of below-the-line techniques are core components in the development of an integrated communications strategy. This unit covers both in detail. Learners will be introduced to the theory, as well as the practice, that is fundamental to understanding advertising and below-the-line techniques and how they can be used to their greatest effect.

On completion of this unit learners will be able to plan an integrated promotional strategy for a business or product. This will include budget formulation, creative and media selection, and how to measure the effectiveness of their plan.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

- 1 Understand the scope of marketing communications
- 2 Understand the role and importance of advertising
- 3 Understand below-the-line techniques and how they are used
- 4 Be able to plan integrated promotional strategies.



# Fairfield School of Business

## Unit content

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### 1. Understand the scope of marketing communications

*Communication process:* nature and components of marketing communications; models of communication; selection and implementation process; consumer buying decision-making process; influences on consumer behaviour: internal (demographics, psychographics, lifestyle, attitude, beliefs), external (cultural, social, environmental factors); response hierarchy/hierarchy of effects models; integration of marketing communications

*Organisation of the industry:* structure and roles of marketing communications agencies; (advertising agencies, marketing agencies, creative agencies, media planning and buying agencies); media owners; advertisers; triangle of dependence; types of agency (full service, à la carte, specialist agencies, media independents, hot shops and boutiques, media sales houses); other supporting services (public relations (PR), sales promotion, marketing research)

*Regulation of promotion:* Consumer Protection From Unfair Trading Regulations, Sale of Goods Act, Supply of Goods and Services Act, Distance Selling Regulations, Consumer Credit Act, Data Protection Act; statutory authorities (Trading Standards, Ofcom, the Office of Communications); self-regulation (Advertising Standards Authority (ASA), Committee of Advertising Practice (CAP)); ethics, consumerism and public opinion as a constraint

*Current trends:* media fragmentation and the decline the power of traditional media; ambient/out-of-home media eg product and brand placement, posters, stickers, car park tickets, till receipts, petrol pumps; new media eg, texts, use of mobile phone, web-based media, pop-ups; brand proliferation; niche marketing/micro-marketing; media inflation; maximising media spend; increased sophistication and use of marketing research; responding to globalisation (global marketing, global brands, global media); ethical marketing eg fair trade, cause-related marketing; e-commerce; viral marketing; use of social networking websites; search engine optimisation; web optimisation

*The impact of ICT:* role of ICT, internet and on channels of communication; global media reach; cyber consumers; online shopping (interdependence, disintermediation, reintermediation); the use of customer relationship management (CRM); online security issues

### 2. Understand the role and importance of advertising

*Role of advertising:* definition, purpose and objectives of advertising; functions of advertising (remind, inform, persuade, sell); advantages and disadvantages of advertising; advertising process; role of advertising within marketing mix, within promotional mix; characteristics of advertising media (print, audio, moving image, ambient, new media)

*Branding:* definition, purpose, objectives, benefits and dimensions of branding; brand strategies (individual, blanket, family, multi-branding, brand extension, own brands,



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brand repositioning); brand image, personality and equity; brand value, brand evaluation techniques

*Creative aspects of advertising:* communication brief (positioning, targeting, messages, message-appeals); creative brief (advertisement design, visuals, copy writing, creative strategies and tactics testing); impact of ICT on advertisement design and dissemination; measuring advertising effectiveness; key media planning concepts (reach, duplication, frequency, flighting); principles in measuring media effectiveness (distribution, ratings, audience share, awareness, cost per thousand)

*Working with advertising agencies:* agency structures; role of account handler and account planner; process and methods of agency selection; agency appointment including contracts and good practice guidelines; agency/client relationships; remuneration (commission, fee, results), media planning; key account management and the stages in developing key account relationships

### **3. Understand below-the-line techniques and how they are used**

*Primary techniques:* sales promotion; public relations; loyalty schemes; sponsorship; product placement; direct marketing; packaging; merchandising; for each of the techniques detailed (consideration of role, characteristics, objectives, advantages/disadvantages, appropriate uses, evaluation measures)

*Other techniques:* an overview of the role and uses of corporate communications; image and identity; exhibitions; word-of-mouth; personal selling; use of new media

### **4. Be able to plan integrated promotional strategies**

*Budget formulation:* budget determination process; methods (percentage of sales, per unit, cost-benefit analysis, competitive parity, task, customer expectation, executive judgement); guidelines for budget allocation; overview of media costs; relative costs of various promotional techniques; comparing low and high-budget campaigns; new product considerations

*Developing a promotional plan:* situation analysis; objectives; communication goals, target audiences; creative strategy; promotional strategy and tactics; media selection; inter and intra-media decisions; scheduling; burst versus drip; budget allocation; evaluation measures; planning tools (AIDA, DAGMAR, SOSTT + 4Ms, SOSTAC, planning software)

*Integration of promotional techniques:* benefits; methods; role of positioning; positioning strategies; push and pull strategies; importance of PR; corporate identity and packaging in aiding integration; barriers to integration (company and agency organisational structures; cost); methods of overcoming these barriers; levels of integration; award-winning campaigns

*Measuring campaign effectiveness:* comparison with objectives; customer response; recall; attitude surveys; sales levels; repeat purchases; loyalty; cost effectiveness; degree of integration; creativity; quantitative and qualitative measures





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## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the scope of marketing communications	1.1 explain the communication process that applies to advertising and promotion 1.2 explain the organisation of the advertising and promotions industry 1.3 assess how promotion is regulated 1.4 examine current trends in advertising and promotion, including the impact of ICT
LO2 Understand the role and importance of advertising	2.1 explain the role of advertising in an integrated promotional strategy for a business or product 2.2 explain branding and how it is used to strengthen a business or product 2.3 review the creative aspects of advertising 2.4 examine ways of working with advertising agencies
LO3 Understand below-the-line techniques and how they are used	3.1 explain primary techniques of below-the-line promotion and how they are used in an integrated promotional strategy for a business or product 3.2 evaluate other techniques used in below-the-line promotion
LO4 Be able to plan integrated promotional strategies	4.1 follow an appropriate process for the formulation of a budget for an integrated promotional strategy 4.2 carry out the development of a promotional plan for a business or product 4.3 plan the integration of promotional techniques into the promotional strategy for a business or product 4.4 use appropriate techniques for measuring campaign effectiveness.

### **Essential requirements**

Learners must have access to the internet in order to carry out research. They will also require access to a range of current advertising and promotional media – print, audio, moving image, ambient and new media. Tutors must build a bank of resource materials to ensure there is a sufficient supply of relevant information across a range of business types and sectors.



# Fairfield School of Business

## Unit 19: Marketing Planning

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to provide learners with the understanding and skills to develop marketing plans that meet marketing objectives, and meet the needs of the target market.

- **Unit abstract**

Effective planning is essential for any marketing activity to ensure that an organisation realises its marketing objectives. Without planning, marketing activity can be inappropriate and waste resources and opportunities.

This unit introduces learners to different ways of auditing, to looking at how internal and external factors can influence marketing planning for an organisation, in order to build up a picture of the marketplace.

Learners will gain an understanding of the main barriers to marketing planning, the effects of barriers, and how these can be avoided or overcome.

Ethical issues in marketing are important in terms of how an organisation and its products are perceived by customers and employees, and can affect the overall ethos and ultimate success of the organisation. This unit will enable learners to investigate and examine how exemplar organisations have been affected by ethical issues, how they deal with them, and how ethical issues should be taken into account when developing marketing plans.

On completion of this unit learners will be able to produce a marketing plan for a product, a service or an organisation that is realistic, in terms of objectives and resources, and effective in terms of the current situation in the marketplace.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Be able to compile marketing audits
2. Understand the main barriers to marketing planning
3. Be able to formulate a marketing plan for a product or service
4. Understand ethical issues in marketing.



# Fairfield School of Business

## Unit content

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### 1. Be able to compile marketing audits

*Changing perspectives:* changing perspectives in marketing planning; market-led strategic change

*Assessment of capability:* evaluate issues relating to aspects of competing for the future and balancing strategic intent and strategic reality

*Organisational auditing:* evaluating and coming to terms with organisational capability; balancing strategic intent and strategic reality; the determinants of capability eg managerial, financial, operational, human resource and intangible (brand) capability; approaches to leveraging capability; aspects of competitive advantage

*External factors:* approaches to analysing external factors that influence marketing planning; the identification and evaluation of key external forces using analytical tools eg PEST (Political, Economic, Social, Technological), PESTLE (Political, Economic, Social, Technological, Legal, Ethical), STEEPLE (Social, Technological, Economic, Environmental, Political, Legal, Ethical); the implications of different external factors for marketing planning; Porter's five forces analysis; identifying the organisation's competitive position and relating this to the principal opportunities and threats; market, product and brand lifecycles

### 2. Understand the main barriers to marketing planning

*Barriers:* objective/strategy/tactics confusion; isolation of marketing function; organisational barriers (organisational culture, change management, ethical issues, behavioural, cognitive, systems and procedures, resources); competitor strategy and activity; customer expectation

### 3. Be able to formulate a marketing plan for a product or service

*The role of marketing planning in the strategic planning process:* the relationship between corporate objectives, business objectives and marketing objectives at operational level; the planning gap and its impact on operational decisions

*The strategic alternatives for new product development:* an overview of the marketing planning process; SWOT analysis (Strengths, Weaknesses, Opportunities, Threats); objectives in differing markets, products and services; product modification through to innovation; evaluation of product and market match; use of Ansoff's matrix; product failure rates and implications for screening ideas against company capabilities and the market; product testing; test marketing; organisational arrangements for managing new product development; costs and pricing; encouraging an entrepreneurial environment; the importance of learning from failure

*Pricing policy:* price taking versus price making; the dimensions of price; approaches to adding value; pricing techniques (price leadership, market skimming, market penetration pricing, competitive market-based pricing, cost-based versus market-



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oriented pricing); the significance of cash flow; the interrelationships between price and the other elements of the marketing mix; taking price out of the competitive equation

*Distribution:* distribution methods; transport methods; hub locations, break-bulk and distribution centres; choice of distribution to point-of-sale; distribution and competitive advantage

*Communication mix:* evaluation of promotional mix to influence purchasing behaviour; media planning and cost; advertising and promotional campaigns; changes to advertising and promotional campaigns over the product lifecycle (PLC); sales planning

*Implementation:* factors affecting the effective implementation of marketing plans; barriers to implementation and how to overcome them; timing; performance measures (financial, nonfinancial, quantitative, qualitative); determining marketing budgets for marketing mix decisions included in the marketing plan; methods of evaluating and controlling the marketing plan; how marketing plans and activities vary in organisations that operate in a virtual marketplace

## **4. Understand ethical issues in marketing**

Ethical issues in marketing: ethics and the development of the competitive stance; different perspectives on ethics in the global marketplace; ethical trade-offs; ethics and managerial cultures

*Ethics of the marketing mix:* management of the individual elements of the marketing mix

*Product:* gathering market research on products; identification of product problems and levels of customer communication; product safety and product recall

*Price:* price fixing; predatory pricing; use of loss leaders; deceptive pricing; price discrimination

*Promotion:* media message impact; sales promotion; personal selling; hidden persuaders; corporate sponsorship

*Distribution:* abuse of power eg restriction of supply; unreasonable conditions set by distributors

*Counterfeiting:* imitation (fakes, knock-offs); pirate and bootleg copies; prior registration and false use of trade names, brand names and domain names

*Consumer ethics:* false insurance claims; warranty deception; misredemption of vouchers; returns of merchandise; illegal downloads, copying and distribution (music, videos, film, software)



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## Learning outcomes and assessment criteria

<b>Learning outcomes</b>	<b>Assessment criteria for pass</b>
<b>On successful completion of this unit a learner will:</b>	<b>The learner can:</b>
LO1 Be able to compile marketing audits	1.1 review changing perspectives in marketing planning 1.2 evaluate an organisation's capability for planning its future marketing activity 1.3 examine techniques for organisational auditing and for analysing external factors that affect marketing planning 1.4 carry out organisational auditing and analysis of external factors that affect marketing planning in a given situation
LO2 Understand the main barriers to marketing planning	2.1 assess the main barriers to marketing planning 2.2 examine how organisations may overcome barriers to marketing planning
LO3 Be able to formulate a marketing plan for a product or service	3.1 write a marketing plan for a product or a service 3.2 explain why marketing planning is essential in the strategic planning process for an organisation 3.3 examine techniques for new product development 3.4 justify recommendations for pricing policy, distribution and communication mix 3.5 explain how factors affecting the effective implementation of the marketing plan have been taken into account
LO4 Understand ethical issues in marketing	4.1 explain how ethical issues influence marketing planning 4.2 analyse examples of how organisations respond to ethical issues 4.3 analyse examples of consumer ethics and the effect it has on marketing planning.

### **Essential requirements**

Learners must have access to the internet in order to carry out research. They will also require access to a range of case studies and exemplar material which illustrate the theories and practice covered in the learning outcomes.

Tutors must build a bank of resource materials to ensure there is a sufficient supply of relevant information across a range of business types and sectors.



# Fairfield School of Business

## Unit 20: Sales Planning and Operations

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to provide learners with an understanding of sales planning, sales management, and the selling process, which can be applied in different markets and environments.

- **Unit abstract**

Selling is a key part of any successful business, and most people will find that they need to use sales skills at some point in their working life – if only to persuade or win an argument. For anyone who is interested in sales as a professional career it pays to understand the basics of selling, to practice, and plan. This unit will introduce learners to the theory of selling and sales planning, and give them the opportunity to put their personal selling skills into practice.

The unit starts with an overview of how personal selling fits within the overall marketing strategy for a business. Learners will be taken through the main stages of the selling process, and be expected to put them to use. Once they are confident about the selling process, learners will investigate the role and objectives of sales management. This is knowledge that can be applied to a wide range of organisations.

Finally, learners will be able to start planning sales activity for a product or service of their own choice – this is another valuable skill that is transferable to many different situations learners may find themselves in as they move into employment or higher education.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

- 1 Understand the role of personal selling within the overall marketing strategy
- 2 Be able to apply the principles of the selling process to a product or service
- 3 Understand the role and objectives of sales management
- 4 Be able to plan sales activity for a product or service.



# Fairfield School of Business

## Unit content

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### 1. Understand the role of personal selling within the overall marketing strategy

*Promotion mix:* personal and impersonal communication; objectives of promotional activity; push-pull strategies; integrating sales with other promotional activities; evaluating promotion; allocation of promotion budget

*Understanding buyer behaviour:* consumer and organisational purchase decision-making processes; influences on consumer purchase behaviour (personal, psychological, social); influences on organisational buyer behaviour (environmental, organisational, interpersonal, individual); purchase occasion; buying interests and motives; buyer moods; level of involvement; importance and structure of the DMU (Decision Making Unit); finding the decision-taker; distinction between customers and users

*Role of the sales team:* definition and role of personal selling; types of selling; characteristics for personal selling; product and competitor knowledge; sales team responsibilities (information gathering, customer and competitor intelligence, building customer databases, prospecting and pioneering, stock allocation, maintaining and updating sales reports and records, liaison with sales office); sales team communications; the role of ICT in improving sales team communications

### 2. Be able to apply the principles of the selling process to a product or service

*Principles:* customer-oriented approach; objective setting; preparation and rehearsal; opening remarks; techniques and personal presentation; need for identification and stimulation; presentation; product demonstration and use of visual aids; handling and pre-empting objections; techniques and proposals for negotiation; buying signals; closing techniques; post sale follow-up; record keeping; customer relationship marketing (CRM)

### 3. Understand the role and objectives of sales management

*Sales strategy:* setting sales objectives; relationship of sales, marketing and corporate objectives; importance of selling in the marketing plan; use of marketing information for planning and decision making (sources and collection methods); role of sales forecasts in planning; quantitative and qualitative sales forecasting techniques; strategies for selling

*Recruitment and selection:* importance of selection; preparing job descriptions and person specifications; sources of recruitment; interview preparation and techniques; selection and appointment

*Motivation, remuneration and training:* motivation theory and practice; team building; target setting; financial incentives; non-financial incentives; salary and commission-based remuneration; induction training; training on specific products; ongoing training and continuous professional development (CPD); training methods; preparation of training programmes; the sales manual



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*Organisation and structure:* organisation of sales activities (by product, by customer, by customer type; by area); estimation and targeting of call frequency; territory design; journey planning; allocation of workload; team building; creating and maintaining effective working relationships; sales meetings; sales conferences

*Controlling sales output:* purpose and role of the sales budget; performance standards; performance against targets (financial, volume, call-rate, conversion, pioneering); appraisals; self-development plans; customer care

*Database management:* importance of database building; sources of information; updating the database; use of database to generate incremental business and stimulate repeat purchase; use of database control mechanisms; importance of ICT methods in database management; security of data; Data Protection Act

## **4. Be able to plan sales activity for a product or service**

*Sales settings:* sales channels (retailers, wholesalers, distributors, agents multi-channel and online retailers); importance of market segmentation: business-to-business (BTB) selling; industrial selling; selling to public authorities; selling for resale; telesales; selling services; pioneering; systems selling; selling to project teams or groups

*International selling:* role of agents and distributors; sources, selection and appointment of agents/distributors; agency contracts; training and motivating agents/distributors; use of expatriate versus local sales personnel; role, duties and characteristics of the export sales team; coping in different cultural environments; the role of ICT in communicating with an international sales team

*Exhibitions and trade fairs:* role, types and locations of trade fairs and exhibitions; how trade fairs and exhibitions fit in with corporate strategy and objectives; setting objectives for participation in an exhibition; audience profile and measurement; qualification and follow-up of exhibition leads; evaluation of exhibition attendance; setting budgets; financial assistance for exhibition attendance; principles of stand design





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## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the role of personal selling within the overall marketing strategy	1.1 explain how personal selling supports the promotion mix  1.2 compare buyer behaviour and the decision making process in different situations  1.3 analyse the role of sales teams within marketing strategy
LO2 Be able to apply the principles of the selling process to a product or service	2.1 prepare a sales presentation for a product or service  2.2 carry out sales presentations for a product or service
LO3 Understand the role and objectives of sales management	3.1 explain how sales strategies are developed in line with corporate objectives  3.2 explain the importance of recruitment and selection procedures  3.3 evaluate the role of motivation, remuneration and training in sales management  3.4 explain how sales management organise sales activity and control sales output  3.5 explain the use of databases in effective sales management
LO4 Be able to plan sales activity for a product or service	4.1 develop a sales plan for a product or service  4.2 investigate opportunities for selling internationally  4.3 investigate opportunities for using exhibitions or trade fairs.

### **Essential requirements**

Learners must have access to a suitable business teaching environment with access to the internet in order to carry out research. They also require access to a range of organisations that have active sales teams currently engaged in personal selling.

Tutors could consider building a bank of contacts and resource materials to ensure there is a sufficient supply of relevant information across a range of business types and sectors.



# Fairfield School of Business

## Unit 21: Human Resource Management

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

This unit provides an introduction to the concepts and practices of human resource management within the United Kingdom and focuses on the management of recruitment, retention and employment cessation.

- **Unit abstract**

Recruiting and retaining staff of the right caliber contributes to the achievement of organisational purposes. Staff must make a valued contribution to the work of the organisation. Eventually they will leave, more often than not because they find alternative employment or retire. Occasionally, however, employment has to be terminated. This unit considers how human resource management deals with these aspects of working. However, the focus of human resource management has moved beyond personnel management towards a more proactive approach that, in addition to the traditional roles associated with staff management, also considers how to get the best people and the best out of people so that they work in roles and ways that are closely aligned to organisational objectives. This often leads to the assertion by many senior managers that ‘Our employees are our most valuable resource’.

Human resource management takes place against a background of organisational needs, policies and procedures that are themselves shaped by legal and regulatory requirements. The unit therefore gives consideration to the national and European legislation that has, for example, seen the introduction of a range of anti-discriminatory legislation, the significance of which can be seen regularly in high profile and often very expensive court cases. Organisations with effective human resource management policies, processes and practices will have committed, skilled employees who contribute effectively to the organisation. In competitive business contexts this is a significant contribution to maintaining a competitive advantage.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

- 1 Understand the difference between personnel management and human resource management
- 2 Understand how to recruit employees
- 3 Understand how to reward employees in order to motivate and retain them
- 4 Know the mechanisms for the cessation of employment.



# Fairfield School of Business

## Unit content

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### 1. Understand the difference between personnel management and human resource management

*Personnel management and human resource management:* development of personnel management; change in contexts leading to human resource management

*Human resource management function:* tasks (selection, recruitment, payroll administration, employee motivation, reward management, employment termination); training and development; performance management (planning, monitoring, recording, actioning); employee relations; working in partnership with functional areas; involvement of line managers (selection, recruitment, training, coaching, mentoring, appraisal, grievance, discipline, termination); ethical issues; equality of opportunity

*Employment legislation:* Sex Discrimination Act 1995/97; Race Relations Act 1992; Race Relations Amendment Act 2000; Equal Pay Act 1970; Disability Discrimination Acts 1995 and 2005; European Working Time Directive; Employment Act 2008; Employment Relations Act 2004; Work and Families Act 2006; national minimum wage; Data Protection Act 1998; employment tribunals

### 2. Understand how to recruit employees

*Human resource planning:* definition, links (organisational purposes, organisational strategy, senior management); purpose (increased volume of business, changes to the required skills sets, employee turnover; labour cost control); time horizon (short term, medium term, long term); internal planning factors (organisational needs, demand for products and services, new products and services, new markets, technological change, location of production); workforce profiles (age, gender, ethnicity, ability, skills); external planning factors (supply and demand for labour (local, national international); government policy; labour market competition; changing nature of work; impact of technology

*Recruitment and selection:* recruitment policies, recruitment procedures, aims and objectives of the selection process; job analysis, job description (eg purpose, standard formats, responsibilities, scope of post, education and qualifications, experience); person specification (purpose, standard formats, job title, location in management line; essential and desirable attributes); recruitment methods (advertising vacancies, application methods including webbased methods, agencies, head hunters); interviews; assessment centres; tests (psychological, psychometric, aptitude, practical); resumés (CV); letters of application; references

### 3. Understand how to reward employees in order to motivate and retain them

*Motivation:* theories of motivation eg F Taylor, E Mayo, A Maslow, F Herzberg, D McGregor, D McClelland, V Vroom; relationship between motivation theories and reward; employee involvement techniques; membership of work groups board, works councils, quality circles, intra-organisational groups (transnational, national, site specific); devolved authority and responsibility; open communications; organisational



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culture (ethos, values, mission); national accreditation (Investors in People (IIP), Charter Mark, International Standards Organisation (ISO))

*Monitoring:* probation; appraisal, feedback; performance indicators (achievement against targets); goal theory; SMART (specific, measurable, achievable, realistic, time-constrained) targets (sales, growth, financial, waiting times, pass rates, punctuality, attendance); benchmarking

*Reward management:* job evaluation; factors determining pay, reward systems; pay; performance-related pay; pension schemes; profit sharing; employee share options; mortgage subsidies; relocation fees; bonuses; company vehicles; loans/advances; child care; school fees; corporate clothes; staff discounts; flexible working; leave; health care; extended parental leave, career breaks; cafeteria incentive schemes; salary sacrifice schemes; contracts of employment

## **4. Know the mechanisms for the cessation of employment**

*Reasons:* dismissal (wrongful, unfair, justified); termination of employment (resignation, retirement, termination of contract); redundancy; redeployment; retraining

*Management of exit:* procedures (retirement, resignation, dismissal, redundancy); legal and regulatory framework; counselling, training; employment tribunals (role, composition, powers and procedures)



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## Learning outcomes and assessment criteria

<b>Learning outcomes</b> <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b> <b>The learner can:</b>
LO1 Understand the difference between personnel management and human resource management	1.1 distinguish between personnel management and human resource management 1.2 assess the function of the human resource management in contributing to organisational purposes 1.3 evaluate the role and responsibilities of line managers in human resource management 1.4 analyse the impact of the legal and regulatory framework on human resource management
LO2 Understand how to recruit employees	2.1 analyse the reasons for human resource planning in organisations 2.2 outline the stages involved in planning human resource requirements 2.3 compare the recruitment and selection process in two organisations 2.4 evaluate the effectiveness of the recruitment and selection techniques in two organisations
LO3 Understand how to reward employees in order to motivate and retain them	3.1 assess the link between motivational theory and reward 3.2 evaluate the process of job evaluation and other factors determining pay 3.3 assess the effectiveness of reward systems in different contexts 3.4 examine the methods organisations use to monitor employee performance
LO4 Know the mechanisms for the cessation of employment	4.1 identify the reasons for cessation of employment with an organisation 4.2 describe the employment exit procedures used by two organisations 4.3 consider the impact of the legal and regulatory framework on employment cessation arrangements.

### **Essential requirements**

Access to business HR documentation, speakers and relevant legislation will be required.



# Fairfield School of Business

## Unit 22: Managing Human Resources

QCF Level 4: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to develop an understanding of the theory and practice of human resource management focussing on current human resources practice and the impact of topical issues and legislation.

- **Unit abstract**

This unit sets the scene by looking at the different theoretical perspectives of human resource management and exploring the differences in these approaches. A variety of changes in the labour market, and the increasing demand from employees for a more manageable work-life balance, has seen the development of much more flexible working practices. This has been the case in all sectors of the economy and in all organisations irrespective of their size or the nature of their business. Some workers have a statutory right to flexible hours and all workers can ask their employer to accommodate their needs in terms of a more flexible pattern of working. This unit examines a variety of flexible working models and looks at practical methods that have evolved in many organisations to meet the needs of employers and employees.

Some elements of the unit require an awareness of the legislative framework which determines the nature and scope of human resources policies and practices. However, the unit does not require detailed knowledge of health and safety or equal opportunities legislation. It examines the practical impact of this legislation on human resources policies and practices. New approaches are explored, including the implications for human resources management of the shift from equal opportunities to managing diversity in the workplace.

The unit explores the different methods of performance management. It examines issues that may affect performance at work, such as ill health and absenteeism and will develop learner understanding of counselling and human resources practices that support employee welfare in the workplace.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the different perspectives of human resource management
2. Understand ways of developing flexibility within the workplace
3. Understand the impact of equal opportunities in the workplace
4. Understand approaches to human resources practices in organisations.



# Fairfield School of Business

## Unit content

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### 1. Understand the different perspectives of human resource management

*The different perspectives of human resource management (HRM):* ‘soft’ and ‘hard’ human resource management, ‘loose’ and ‘tight’ human resource management ; models of Guest and Storey differences between HRM and IR and personnel practices; strategic approaches to HRM

### 2. Understand ways of developing flexibility within the workplace

*Flexible working models:* the core and periphery workforce model (Atkinson 1984); Handy’s (1989) Shamrock Organisation

*Types of flexibility:* eg numerical, functional, temporal, locational, financial

*Flexible working methods:* eg employment of part-time and temporary staff, teleworking, homeworking, job sharing, zero hours contracts, annual hours, staggered hours, compressed hours

*Labour market and the need for flexibility:* labour market demographics, employment statistics, local, regional and national labour markets and the growing recognition of the importance of work-life balance

### 3. Understand the impact of equal opportunities within the workplace

*Discrimination in employment:* forms of discrimination, eg gender, ethnicity, religion, disability, age, sexual orientation, education

*The legislative framework:* direct and indirect discrimination; current legislation and proposed changes to the law eg age

*Equal opportunities in employment:* equal opportunities practices and initiatives in the workplace including initiatives such as Opportunity 2000 and positive action approaches, codes of practice, implementing policy, training within the law and monitoring; the move from equal opportunities to managing diversity



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## 4. Understand approaches to human resources practices in organisations

*Performance management:* the role, purpose and types of appraisal, 360 degree feedback, the skills of carrying out appraisals and giving feedback, the link of appraisals to reward management

*Counselling and employee welfare:* the traditional welfare function – occupational health practices and policies, the management of ill health at work, costs and absenteeism, accidents at work (statistics), ergonomics, alcohol and drug abuse, HIV and AIDS, stress and stress management, workplace counselling

*Health and safety legislation:* Health and Safety at Work Act (1974) and the role of the Health and Safety Commission, European Community Directives eg Working Time Regulations (1998), Parental Leave (2009)

*Other topical issues:* e-recruitment, e-learning, flexible benefits, work-life balance, employee voice, changes to pension schemes





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## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand the different perspectives of human resource management	1.1 explain Guest's model of HRM 1.2 compare the differences between Storey's definitions of HRM, personnel and IR practices 1.3 assess the implications for line managers and employees of developing a strategic approach to HRM
LO2 Understand ways of developing flexibility within the workplace	2.1 explain how a model of flexibility might be applied in practice 2.2 discuss the types of flexibility which may be developed by an organisation 2.3 assess the use of flexible working practices from both the employee and the employer perspective 2.4 discuss the impact that changes in the labour market have had on flexible working practices
LO3 Understand the impact of equal opportunities within the workplace	3.1 explain the forms of discrimination that can take place in the workplace 3.2 discuss the practical implications of equal opportunities legislation for an organisation 3.2 compare the approaches to managing equal opportunities and managing diversity
LO4 Understand approaches to human resources practices in organisations	4.1 compare different methods of performance management 4.2 assess the approaches to the practice of managing employee welfare in a selected organisation 4.3 discuss the implications of health and safety legislation on human resources practices 4.4 evaluate the impact of one topical issue on human resources practices.

### **Essential requirements**

Access to relevant theories, practices, models and legislation will be required.



# Fairfield School of Business

## Unit 23: Human Resources Development

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

This unit will develop the skills and understanding needed for planning and designing training and development, through understanding how people learn and the suitability of different training methods and initiatives.

- **Unit abstract**

Human resource development contributes to the overall success of an organisation through providing learning, development and training opportunities to improve individual, team and organisational performance. Training and development affects everyone in the organisation and it is appropriate at every level from office junior to senior executive. Learning is complex and this unit explores the related theories and their contribution to the process of transferring learning to the workplace. It is important, therefore, for learners to appreciate that all staff should be encouraged to develop their skills and knowledge to achieve their potential and, in doing so, enable the organisation to meet its strategic objectives.

Learners need to appreciate that successful organisations recognise that their training programmes need to be planned and managed. All training has a cost to the organisation and managers need to be able to provide training programmes within their training budgets. Through planning and designing a training and development event, this unit aims to develop knowledge and understanding of these key areas. Learners will examine how to identify training needs across the organisation, as well as understand how government-led vocational and general training initiatives contribute to the emphasis on lifelong learning and continuous development.

The outcomes of training programmes need to be evaluated. Managers need to devise appropriate ways of assessing or measuring the impact of staff training. The process of managing the training cycle is important to an organisation. If it is well managed, staff will have the correct of up-to-date skills and knowledge that will allow them to perform their jobs effectively.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand learning theories and learning styles
2. Be able to plan and design training and development
3. Be able to evaluate a training event
4. Understand government-led skills development initiatives.



# Fairfield School of Business

## Unit content

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### 1 Understand learning theories and learning styles

*Learning theories and learning styles:* styles eg activists, reflectors, theorists, pragmatists, (Honey and Mumford 1986); Kolb's learning style inventory; Myers Briggs Type Indicator; learning theories eg behaviourist, cognitive, reinforcement, experiential, stimulus-response; requirements for effective learning; informal learning; workplace learning; self-managed learning; continuous learning and development; learning curve and transfer of learning to the workplace; impact of learning theories and styles when planning and designing a learning event

### 2 Be able to plan and design training and development

*Plan and design approaches:* the systematic approach (identify training needs, define the learning required, set objectives, plan and implement training, evaluate training), planning issues eg numbers, location, content, internal/external trainers, administration; training budget, training costs

*Training and development methods:* on/off-the-job; delivery methods (mentoring, coaching, action learning, assignments, projects, shadowing, secondments, training courses, conferences, seminars, e-learning and outdoor development)

### 3 Be able to evaluate a training event

*Evaluation:* the 'what, why, when, and who' of evaluation; planning; design; delivery; implementation; key stakeholders; achievement of objectives

*Techniques:* benefits and limitations of methods eg questionnaires, observation, trainer/trainee feedback, customer comments, training audits, achievements of awards by trainees; indicators, eg labour turnover, productivity measures, quality improvements, performance indicators (sales figures, customer service feedback)

### 4 Understand government-led skills development initiatives

*General and vocational training schemes and initiatives:* government approaches to training and development in the UK; QCDA and Ofqual; Learning and Skills Council (LSC); Sector Skills Councils (SSCs); Learndirect; Investors in People (IiP); National Skills Academies; apprenticeship schemes; New Deal; Train to Gain; NVQs; impact of the competency movement on the public and private sectors.



# Fairfield School of Business

## Learning outcomes and assessment criteria

<b>Learning outcomes</b>  <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b>  <b>The learner can:</b>
LO1 Understand learning theories and learning styles	1.1 compare different learning styles 1.2 explain the role of the learning curve and the importance of transferring learning to the workplace 1.3 assess the contribution of learning styles and theories when planning and designing a learning event
LO2 Be able to plan and design training and development	2.1 compare the training needs for staff at different levels in an organisation 2.2 assess the advantages and disadvantages of training methods used in an organisation 2.3 use a systematic approach to plan training and development for a training event
LO3 Be able to evaluate a training event	3.1 prepare an evaluation using suitable techniques 3.2 carry out an evaluation of a training event 3.3 review the success of the evaluation methods used
LO4 Understand government-led skills development initiatives	4.1 explain the role of government in training, development and lifelong learning 4.2 explain how the development of the competency movement has impacted on the public and private sectors 4.3 assess how contemporary training initiatives introduced by the UK government contribute to human resources development for an organisation.

### **Essential Resources**

Access to organisations, their documentation and speakers will be required.



# Fairfield School of Business

## Unit 24: Employee Relations

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

The aim of this unit is to introduce learners to the importance of good employee relations for business success and the impact of changes which have affected employment relationships.

- **Unit abstract**

The term ‘employee relations’ has replaced that of ‘industrial relations’ Industrial relations are generally recognised as relations between an employer and a collective workforce, typically through a recognised union. Employee relations means the relationship between an employee and employer, and this is largely controlled by legislation and is being revised and updated continuously. It is important for learners to appreciate how good employee/employer relations contribute to the success and effectiveness of a business. In this unit they will investigate how cooperation between employers and employees leads to the development of good working relations against a changing background.

The success of a business often relies on its relationships with its employees. Learners will investigate and explore different types of industrial conflict and the procedures for resolving this. It is important that learners are aware of change and keep up to date with developments in dispute procedures in relation to employment law.

Legislation and EU directives play a major role in employee relations and learners will examine how these are applied in organisations. It is important that organisations have procedures in place for collective bargaining, and learners will examine how these procedures are managed and implemented properly to avoid disputes. This unit will give learners the opportunity to study the most up-to-date employment legislation and investigate how employment involvement techniques affect human resource management.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Understand the context of employee relations against a changing background
2. Understand the nature of industrial conflict and its resolution
3. Understand collective bargaining and negotiation processes
4. Understand the concept of employee participation and involvement.



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## Unit content

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### **1. Understand the context of employee relations against a changing background**

*The role of the trade union:* types of trade union, the Trades Union Congress, employer associations, trade union representatives

*The history and development of trade unions:* the rise of trade unionism; trade unions and the law; union growth and decline; changing business environment eg political, technological, social, legal and economic; relevance to industrial relations

*The main players in employee relations:* workers, managers, organisations, government agencies concerned with the workplace and work community

*Theoretical perspectives:* unitarist, pluralist, radical; review of perspectives by the stakeholders in employee relations

### **2. Understand the nature of industrial conflict and its resolution**

*The nature of industrial conflict:* ideological framework, conflict and cooperation

*Different types of dispute:* collective disputes, strike action, strike statistics, ballots, no-strike agreements

*Resolving conflict:* dispute procedures, arbitration and the role of the Advisory, Conciliation and Arbitration Service (Acas)

### **3. Understand collective bargaining and negotiation processes**

*The nature and scope of collective bargaining:* roles eg shop stewards, union officials employer associations and management

*The collective bargaining process:* institutional agreements for collective bargaining, local workplace bargaining, single-table bargaining

*Negotiation processes:* negotiation strategy, preparation for negotiation, conducting the case-settlement, disclosure of information

### **4. Understand the concept of employee participation and involvement**

*Consultation and employee participation:* different forms of employee consultation and participation, joint consultation committees, communication channels



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*Industrial democracy and employee participation:* European Works Councils (European Objectives), the social dimensions of the European Union and supervisory boards, national cultural differences in terms of democracy and employee participation

*Employee involvement techniques:* sharing information, consultation, financial participation, commitment to quality, developing the individual, involvement of other stakeholders

*Empowerment:* devolution of responsibility/authority to line managers/employees; the impact of human resource management; approach to employee relations (link to unitarist and pluralist perspectives)



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## Learning outcomes and assessment criteria

<b>Learning outcomes</b>	<b>Assessment criteria for pass</b>
<b>On successful completion of this unit a learner will:</b>	<b>The learner can:</b>
LO1 Understand the context of employee relations against a changing background	1.1 explain the unitary and pluralistic frames of reference 1.2 assess how changes in trade unionism have affected employee relations 1.3 explain the role of the main players in employee relations
LO2 Understand the nature of industrial conflict and its resolution	2.1 explain the procedures an organisation should follow when dealing with different conflict situations 2.2 explain the key features of employee relations in a selected conflict situation 2.3 evaluate the effectiveness of procedures used in a selected conflict situation
LO3 Understand collective bargaining and negotiation processes	3.1 explain the role of negotiation in collective bargaining 3.2 assess the impact of negotiation strategy for a given situation
LO4 Understand the concept of employee participation and involvement	4.1 assess the influence of the EU on industrial democracy in the UK 4.2 compare methods used to gain employee participation and involvement in the decision making process in organisations 4.3 assess the impact of human resource management on employee relations.

### **Essential requirements**

Learners will need access to case books and legal texts on employee relations situations. Tutors must build a bank of resource materials to ensure there is a sufficient supply of relevant information across a range of industrial conflicts.





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## Unit 47: Employability Skills

QCF Level 5: BTEC Higher National

Credit value: 15

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- **Aim**

This unit provides learners with the opportunity to acquire honed employability skills required for effective employment.

- **Unit abstract**

All learners at all levels of education and experience require honed employability skills as a prerequisite to entering the job market. This unit gives learners an opportunity to assess and develop an understanding of their own responsibilities and performance in, or when entering, the workplace.

It considers the skills required for general employment, such as interpersonal and transferable skills, and the dynamics of working with others in teams or groups including leadership and communication skills.

It also deals with the everyday working requirement of problem solving which includes the identification or specification of the 'problem', strategies for its solution and then evaluation of the results through reflective practices.

- **Learning outcomes**

**On successful completion of this unit a learner will:**

1. Be able to determine own responsibilities and performance
2. Be able to develop interpersonal and transferable skills
3. Understand the dynamics of working with others
4. Be able to develop strategies for problem solving.



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## Unit content

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### 1. Be able to determine own responsibilities and performance

*Own responsibilities:* personal responsibility; direct and indirect relationships and adaptability, decision-making processes and skills; ability to learn and develop within the work role; employment legislation, ethics, employment rights and responsibilities

*Performance objectives:* setting and monitoring performance objectives

*Individual appraisal systems:* uses of performance appraisals eg salary levels and bonus payments, promotion strengths and weaknesses, training needs; communication; appraisal criteria eg production data, personnel data, judgemental data; rating methods eg ranking, paired comparison, checklist, management by objectives

*Motivation and performance:* application and appraisal of motivational theories and techniques, rewards and incentives, manager's role, self-motivational factors

### 2. Be able to develop interpersonal and transferable skills

*Effective communication:* verbal and non-verbal – awareness and use of body language, openness and responsiveness, formal and informal feedback to and from colleagues; ICT as an effective communication medium; team meetings

*Interpersonal skills:* personal effectiveness; working with others; use of initiative; negotiating skills; assertiveness skills; social skills

*Time management:* prioritising workload; setting work objectives; making and keeping appointments; working steadily rather than erratically; time for learning; reliable estimate of task time

*Problem solving:* problem analysis; researching changes in the workplace; generating solutions; choosing a solution

### 3. Understand the dynamics of working with others

*Working with others:* nature and dynamics of team and group work; informal and formal settings, purpose of teams and groups eg long-term corporate objectives/strategy; problem solving and short-term development projects; flexibility/adaptability; team player

*Teams and team building:* selecting team members eg specialist roles, skill and style/approach mixes; identification of team/work group roles; stages in team development eg team building, identity, loyalty, commitment to shared beliefs, team health evaluation; action planning; monitoring and feedback; coaching skills; ethics; effective leadership skills, eg, setting direction, setting standards, motivating, innovative, responsive, effective communicator, reliability, consistency



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## 4. Be able to develop strategies for problem solving

*Specification of the problem:* definition of the problem; analysis and clarification

*Identification of possible outcomes:* identification and assessment of various alternative outcomes

*Tools and methods:* problem-solving methods and tools

*Plan and implement:* sources of information; solution methodologies; selection and implementation of the best corrective action eg timescale, stages, resources, critical path analysis

*Evaluation:* evaluation of whether the problem was solved or not; measurement of solution against specification and desired outcomes; sustainability



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## Learning outcomes and assessment criteria

<b>Learning outcomes</b> <b>On successful completion of this unit a learner will:</b>	<b>Assessment criteria for pass</b> <b>The learner can:</b>
LO1 Be able to determine own responsibilities and performance	1.1 develop a set of own responsibilities and performance objectives 1.2 evaluate own effectiveness against defined objectives 1.3 make recommendations for improvement 1.4 review how motivational techniques can be used to improve quality of performance
LO2 Be able to develop interpersonal and transferable skills	2.1 develop solutions to work based problems 2.2 communicate in a variety of styles and appropriate manner at various levels 2.3 identify effective time-management strategies
LO3 Understand the dynamics of working with others	3.1 explain the roles people play in a team and how they can work together to achieve shared goals 3.2 analyse team dynamics 3.3 suggest alternative ways to complete tasks and achieve team goals
LO4 Be able to develop strategies for problem solving	4.1 evaluate tools and methods for developing solutions to problems 4.2 develop an appropriate strategy for resolving a particular problem 4.3 evaluate the potential impact on the business of implementing the strategy.

### **Essential requirements**

Case studies based on relevant sectors, workshops, career talks or work based mentors will also be useful in the teaching and learning aspect of the unit.