

# Higher Nationals

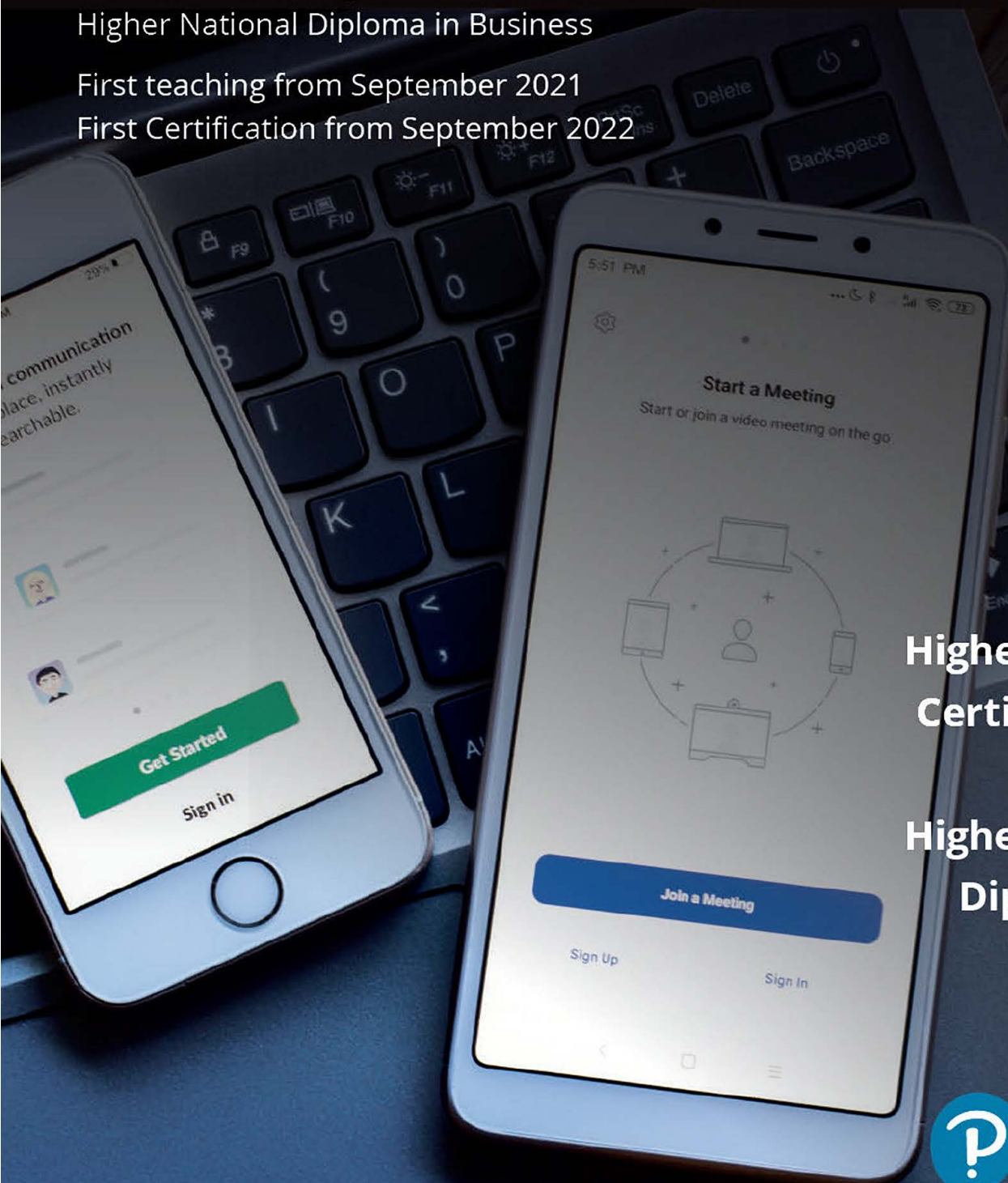
## Business (for Service Industries)

### UNIT DIRECTORY

For use with the Higher National Certificate and  
Higher National Diploma in Business

First teaching from September 2021

First Certification from September 2022



**Higher National  
Certificate Lvl 4**

**Higher National  
Diploma Lvl 5**



**Pearson  
BTEC**

# HND Business (Service Industries)

## Programme Structure 2021-22

### Year 1 (120 Credits)

Unit Number	Unit Title	Credits	Level	Core/Optional
1	Business and the Business Environment	15	4	Core
2	Marketing Processes and Planning	15	4	Core
3	Human Resource Management	15	4	Core
4	Leadership & Management	15	4	Core
5	Accounting Principles	15	4	Core
6	Managing a Successful Business Project (Pearson-set)	15	4	Core
16	Managing Customer Experience	15	4	Specialist
18	Work Experience	15	4	Specialist
31	Period Hair and Make-up (from HNC/D Performing Arts)	15	4	Specialist

### Year 2 (120 Credits)

Unit Number	Unit Title	Credits	Level	Core/Optional
19	Research Project (Pearson set)	30	5	Core
20	Organisational Behaviour	15	5	Core
24	Understanding and Leading Change	15	5	Specialist
25	Global Business Environment	15	5	Specialist
26	Principles of Operations Management	15	5	Specialist
29	Managing and Running a Small Business	15	5	Specialist
48	Customer Value Management	15	5	Specialist

# Unit 1: Business and the Business Environment

**Unit code** T/618/5032

**Unit type** Core

**Unit level** 4

**Credit value** 15

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## Introduction

Business activity is fundamental and universal to our everyday lives. Business organisations may differ in many ways, depending on the industry in which they operate globally, but they do share one common feature: the transformation of inputs into outputs. This transformation process takes place against a background of external influences that impact on business activity. The external environment in which business organisations operate is dynamic, complex, volatile and interactive.

The aim of this unit is to give students background knowledge and understanding of business, of the functions of an organisation and of the wider business environments in which organisations operate. Students will examine the different types of organisations (including for profit and not for profit), their size and scope (for instance micro, SME, transnational and global) and how they operate. Students will explore the relationships that organisations have with their various stakeholders and how the wider external environments influence and shape business decision making.

The knowledge, understanding and skill sets that students gain in this unit will help them to have an insight into different business functions, which will support them with further study, support the development of analytical thinking and the application of key analytical tools used throughout business planning, and enable them to choose their preferred areas of specialism in future studies and in their professional career.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Explain the different types, size and scope of organisations
- LO2 Demonstrate the interrelationship of the various functions within an organisation and how they link to organisational structure
- LO3 Use contemporary examples to demonstrate both the positive and negative influence/impact the macro environment has on business operations
- LO4 Determine the internal strengths and weaknesses of specific businesses and their interrelationship with external macro factors.



## Essential Content

### LO1 Explain the different types, size and scope of organisations

#### *Different types of organisations:*

Differences between for profit and not for profit and non-government organisations (NGOs).

Micro-, small-, medium-sized enterprises (SMEs). Different business purposes, objectives and supply of goods and services.

The range of legal structures associated with different forms of business: sole traders, partnerships, limited companies.

#### *Size and scope of organisations:*

Differences between large-, medium-sized and small organisations, including objectives and goals, market share, profit share, growth and sustainability.

Global growth and developments of transnational, international and global organisations.

Differences between franchising, joint ventures and licensing.

Industrial structures and competitive analysis.

Market forces and economic operations, e.g. scarcity and choice, supply and demand, income elasticity.

Stakeholders and responsibilities of organisations to meet different stakeholder interests and expectations.

### LO2 Demonstrate the interrelationship of the various functions within an organisation and how they link to organisational structure

#### *The various functions within an organisation:*

The role of marketing, finance, human resource management and operations within an organisational context and the interrelationships.

Functions in relation to overall organisation mission and objectives.

*Organisational structure:*

Different structures depending on the size and scope of the organisation, including bureaucratic and post-bureaucratic, parent, strategic business units (SBUs), matrix and functional levels.

The virtual organisation and flexible, fluid structures that are geographically dispersed.

Organisation structures and complexities of transnational, international and global organisations.

**LO3 Use contemporary examples to demonstrate both the positive and negative influence/impact the macro environment has on business operations**

*The context of the macro environment:*

The different political, economic, social, technological, legal and environmental factors that influence and impact the business environment.

The PESTLE framework as an analytical tool to monitor and forecast external influences.

Different spatial levels of external influences, e.g. local, regional, national, international

*The macro factors that influence and impact on business activities:*

The transformation of the work environment, the changing and emerging markets, the global shift in economic and social power due to international global crisis.

The impact of emerging digital technologies on production and consumption of products and services including:

- social and mobile technologies to engage and extend customer reach
- cloud technologies for making business more agile, collaborative and efficient
- Artificial Intelligence (AI) to sustain competitive advantage.
- Blockchain for e-commerce

Emerging new sectors creating new career opportunities due to new technologies e.g. data and analytics, digital advertising

The impacts of increased innovation and disruptive innovation.

The growth of data analytics and business intelligence using Big Data, to inform decision making, the rise of cybersecurity and data protection.

The impact of globalisation, e.g. changing workforce, cultural diversity.

The growth of ethical considerations and sustainable business, e.g. equality and diversity and corporate social responsibility.

*Organisation operations:*

Organisations' responses to transformation and managing resistance to change in response to a highly volatile and changing market environment.

Dealing with unexpected crises that affect business operations and activities, e.g. crisis management and recovery.

**LO4 Determine the internal strengths and weaknesses of specific businesses and their interrelationship with external macro factors.**

*Frameworks for analysis:*

Introduction to SWOT and/or TOWS analysis and how they can assist in the decision-making process and feed into business planning in organisations.

Different applications of SWOT analysis, e.g. for market positioning, commercial viability, launching a new product, methods of sales distribution.

*Internal vs external factors:*

Internal factors relating to products, pricing, costs, profitability, performance, quality, people, skills, adaptability, brands, services, reputation, processes, infrastructure.

Key external factors that inform opportunities and threats, including the competitive environment and government intervention, that influence organisations and business.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>LO1</b> Explain the different types, size and scope of organisations		<b>LO1 and LO2</b> <b>D1</b> Provide critical analysis of the complexities of different organisations and structures.
<b>P1</b> Explain different types and purposes of organisations; public, private and voluntary sectors and legal structures. <b>P2</b> Explain the size and scope of a range of different types of organisations.	<b>M1</b> Analyse how the structure, size and scope of different organisations link to the business objectives and product and services offered by the organisations.	
<b>LO2</b> Demonstrate the interrelationship of the various functions within an organisation and how they link to organisational structure		
<b>P3</b> Explain the relationship between different organisational functions and how they link to organisational objectives and structure.	<b>M2</b> Analyse the interrelationships between organisational functions and the impact that can have upon organisational structure.	

Pass		Merit	Distinction
<b>L03</b> Use contemporary examples to demonstrate both the positive and negative influence/impact the macro environment has on business operations			<b>L03 and L04</b>  <b>D2</b> Critically evaluate the impacts that both macro- and micro factors have on business objectives and decision making.
<b>P4</b> Identify the positive and negative impacts the macro environment has on business operations, supported by specific examples.	<b>M3</b> Apply appropriately the PESTLE model to support a detailed analysis of the macro environment in an organisation.		
<b>L04</b> Determine the internal strengths and weaknesses of specific businesses and their interrelationship with external macro factors.			
<b>P5</b> Conduct internal and external analysis of specific organisations in order to identify strengths and weaknesses.  <b>P6</b> Explain how strengths and weaknesses interrelate with external macro factors.	<b>M4</b> Apply appropriately SWOT/TOWS analysis and justify how they influence decision making.		



## Recommended Resources

### Textbooks

BURNS, J. and NEEDLE, D. (2019) *Business in Context: An Introduction to Business and its Environment*. 7th Ed. Cengage Learning.

MORRISON, J. (2020) *The Global Business Environment: Towards Sustainability?* 5th Ed. Red Globe Press.

WETHERLEY, P. (Editor) and OTTER, D. (2018) *The Business Environment: Themes and Issues in a Globalised World*. 4th Ed. Oxford: Oxford University Press.

WORTHINGTON, I. and BRITTON, C. (2018) *The Business Environment*. 8th Ed. Harlow: Pearson.

### Websites

<a href="http://www.businessballs.com">www.businessballs.com</a>	Business Balls (General reference)
<a href="http://www.businesscasestudies.co.uk">www.businesscasestudies.co.uk</a>	Business Case Studies (case studies)
<a href="http://www.forbes.com">www.forbes.com</a>	Forbes (General reference)
<a href="http://www.ibtimes.com">www.ibtimes.com</a>	International Business Times Business (General reference)
<a href="http://www.ted.com">www.ted.com</a>	TED Talks Business and technology (Video resources)

### Links

This unit links to the following related units:

*Unit 2: Marketing Processes and Planning*

*Unit 25: Global Business Environment*

*Unit 43: Business Strategy*

## Unit 2: Marketing Processes and Planning

**Unit code** A/618/5033

**Unit type** Core

**Unit level** 4

**Credit value** 15

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### Introduction

Large-, medium- and small businesses that operate globally, internationally or locally have at least one thing in common – they all use marketing to influence us to engage with their products and/or services. Whether this means becoming a loyal customer buying a product and service or donating to a charity, organisations use a range of marketing techniques and tools to inform and influence us.

This unit is designed to introduce students to the dynamic world of the marketing sector and the wealth of exciting career opportunities available to support their decision making in their career choices. Students will have the opportunity to learn about the competencies and behaviours required by employers to work in the marketing sector. They will be introduced to the key principles of marketing, enabling them to develop a marketing plan and to employ elements of the marketing mix to achieve results. They will study the underpinning theories and frameworks of marketing while relating them to real-world examples, including products/services that they encounter in their daily lives.

The knowledge, understanding and skill sets that students will gain on successfully completing this unit will enhance their career opportunities; whether this is setting up their own business or employment in an organisation.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Explain the role of marketing and how it interrelates with other business units of an organisation
- LO2 Compare ways in which organisations use elements of the marketing mix to achieve overall business objectives
- LO3 Produce a marketing plan for an organisation that meets marketing objectives
- LO4 Develop a media plan to support a marketing campaign for an organisation.

## Essential Content

### LO1 Explain the role of marketing and how it interrelates with other business units of an organisation

#### *The marketing concept:*

The development of the marketing concept, including current and future trends.

The concepts of brand positioning and management and implementing process to support corporate reputation.

The external environmental influences that impact on marketing activity.

#### *The role of marketing:*

The structure and operations of marketing departments:

- market research
- advertising
- direct marketing
- integrated communications
- brand management
- partnership marketing
- Public Relations (PR).

The roles, responsibilities and competencies required in marketing, e.g. marketing executive, marketing and communications officer, digital marketer.

Overview of marketing processes that include market research, data analysis, strategic planning and conducting marketing campaigns.

The role of digital marketing as a core driver of marketing strategy, including Search Engine Optimisation (SEO), use of web analytics, social media marketing, mobile marketing, pay-per-click marketing.

Sector specific legal, regulatory and compliance frameworks, including current data protection regulations.

#### *The interrelationships of business units:*

Marketing as a business function.

The different roles of business units and the interrelationships between these functional areas and marketing.

The principles of stakeholder management and customer relationship management (CRM) to facilitate effective cross-functional relationships internally.

## LO2 Compare ways in which organisations use elements of the marketing mix to achieve overall business objectives

### *The 7Ps marketing mix:*

Creating a unique selling proposition for products and services.

**Product** portfolios analysis (Boston Consulting Group Matrix and GE McKinsey Matrix) to identify new product development and planning for the different stages of the product lifecycle.

Reviewing **pricing** models in view of established price points and sensitivity to competitors' pricing and consumers.

Different pricing strategies and tactics.

**Place** strategies and channel distribution for expanding access and reach to specific market segments.

**Promotion** to stay ahead of the competition, including integrated communication mix, cross-communication solutions and digital promotional tools and strategies.

The different roles of **'people'** in marketing, including customer interfacing and support personnel to deliver both customer value and added value.

**Physical** evidence and the tangible aspects of service delivery – visual, aural and olfactory elements.

Systems and **processes** involved in delivering a consistent service. The different types of processes used to expedite the marketing function

### *Achieving overall business objectives:*

Marketing mix tactics for building and maintaining stakeholder relationships, penetrating markets, expanding reach to new market segments and developing new products.

Adapting and integrating the marketing mix to meet organisational objectives and changes in a competitive environment.

Measuring the effectiveness of the marketing mix using metrics, e.g. market share, sales, number of new products, repeat purchases, discount levels and margins, customer satisfaction rates.

Use of online metrics including cost per rating point (CPP) and click to conversion (CTC).



### LO3 **Produce a marketing plan for an organisation that meets marketing objectives**

#### *Tactical market planning:*

The purpose of marketing planning and implementing marketing plans.

The benefits of marketing plans.

The links between marketing plans, marketing objectives and marketing strategy and alignment to overall organisation objectives.

Types of marketing objectives, e.g. increase market share, promote new product/service.

#### *Marketing planning process:*

Defining the company mission statement and corporate objectives.

The marketing audit, applying analytical tools, e.g. SWOT, PESTLE, 5C analysis.

Competitive analysis using analytical tools, e.g. Boston Consulting Group Matrix (BCG).

Market segmentation and target market selection and profiling.

Setting goals and SMART (Specific, Measurable, Achievable, Realistic, Timely) objectives.

Creating marketing strategies applied to the marketing mix.

Tactics to execute marketing strategies.

Allocation of resources and implementation.

Monitoring and control measures.

#### *Strategic marketing planning:*

Extended market research and auditing.

Target market profiling, including buyer personas, identifying influencers and early adopters.

Value positioning.

Marketing strategies that apply to the extended marketing mix and tactical planning.

Measurements of success, e.g. Return on Marketing Investment (ROMI), Customer Lifetime Value (CLV), Net Promoter Score (NPS).

Evaluating and monitoring marketing plans using appropriate control and evaluation techniques such as sales analysis, market-share analysis, efficiency ratios and cost-profitability analysis.

#### **LO4 Develop a media plan to support a marketing campaign for an organisation.**

##### *Marketing campaigns:*

The purpose of marketing campaigns.

Different types of marketing campaigns.

The role of the creative brief.

Setting campaign objectives and parameters, e.g. for brand awareness, changing attitudes, increasing sales.

Different communication, messaging and positioning strategies.

Campaign tactics that are SMART.

Metrics for measuring success.

Setting timelines and action plans.

##### *The media plan:*

Consumer level targeting to establish customer value proposition, key messaging and platform preference.

Different digital platforms and offline tools for communication.

Features and benefits of integrated multimedia channels.

Different approaches to frequency and reach.

Setting quantitative and qualitative criteria, e.g. speed of reach, frequency, message life, image-building capability and emotional impact.

## Learning Outcomes and Assessment Criteria

Pass		Merit	Distinction
<b>LO1</b> Explain the role of marketing and how it interrelates with other business units of an organisation			<b>D1</b> Critically analyse the external and internal environment in which the marketing function operates.
<b>P1</b> Explain the concept of marketing and marketing operations including the different areas and role of marketing.	<b>P2</b> Explain how the marketing function relates to the wider organisational context.	<b>M1</b> Analyse the role of marketing in the context of the marketing environment. <b>M2</b> Analyse the significance of interrelationships between marketing and other functional units of an organisation.	
<b>LO2</b> Compare ways in which organisations use elements of the marketing mix to achieve overall business objectives			<b>D2</b> Evaluate strategies and tactical approaches to the marketing mix in achieving overall business objectives.
<b>P3</b> Compare the ways in which different organisations apply the marketing mix to the marketing planning process to achieve business objectives.		<b>M3</b> Review strategies and tactical approaches applied by organisations to demonstrate how business objectives can be achieved successfully.	
<b>LO3</b> Produce a marketing plan for an organisation that meets marketing objectives			<b>D3</b> Produce a strategic marketing plan for an organisation that measures achievement of marketing objectives within key performance metrics.
<b>P4</b> Develop a marketing plan that includes key elements of marketing planning for an organisation to achieve marketing objectives.		<b>M4</b> Produce a detailed tactical marketing plan that integrates the extended marketing mix to achieve marketing objectives.	

Pass	Merit	Distinction
<b>LO4</b> Develop a media plan to support a marketing campaign for an organisation.		<b>D4</b> Provide a justified integrated multimedia plan based on quantitative and qualitative criteria.
<b>P5</b> Produce a media plan that includes recommendations and rationale for selected media activities that meet budgetary requirements and objectives of a marketing campaign brief.	<b>M5</b> Devise an integrated multimedia plan, selecting appropriate digital, offline and social media channels for communication.	

## Recommended Resources

### Textbooks

GROUCUTT, J. and HOPKINS, C. (2015) *Marketing* (Business Briefings). London: Palgrave Macmillan.

JOBBER, D. and CHADWICK, F. (2019) *Principles and Practice of Marketing*. 9th Ed. Maidenhead: McGraw-Hill.

KOTLER, P. and ARMSTRONG, G. (2016) *Principles of Marketing*. 7th Ed London: Pearson.

MCDONALD, M. and WILSON, H. (2016) *Marketing Plans: How to Prepare Them, How to Use Them*. 8th Ed. Chichester: John Riley and Sons.

### Websites

<a href="http://www.cim.co.uk">www.cim.co.uk</a>	Chartered Institute of Marketing (General reference)
<a href="http://www.marketingdonut.co.uk">www.marketingdonut.co.uk</a>	Marketing Donut (General reference)
<a href="http://www.marketingteacher.com">www.marketingteacher.com</a>	<i>Marketing Teacher</i> All sections (General reference)
<a href="http://www.marketingweek.com">www.marketingweek.com</a>	<i>Marketing Week</i> New and industry articles (General reference)

### Links

This unit links to the following related units:

*Unit 1: Business and the Business Environment*

*Unit 33: Marketing Insights and Analytics*

*Unit 34: Digital Marketing*

*Unit 35: Integrated Marketing Communications*



## Unit 3: Human Resource Management

<b>Unit code</b>	<b>J/618/5035</b>
<b>Unit type</b>	<b>Core</b>
<b>Unit level</b>	<b>4</b>
<b>Credit value</b>	<b>15</b>

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### Introduction

People are the lifeblood of any organisation and the ability to attract, recruit and retain talented staff is critical to the success of any organisation, whether in business, in voluntary organisations or in government. Human Resource Management (HRM) provides organisations with the principles, knowledge and behaviours to focus people-management activities on supporting and enhancing organisational success and performance.

This unit will give students the knowledge and skills associated with Human Resource (HR) occupational roles at either a generalist level, for example HR Assistant/HR Advisor/Business Partner, or more specialist roles in areas such as recruitment, talent acquisition and performance and reward management. Students will explore the nature and scope of HRM and the organisational context of people management, including recruitment and retention, training and development, reward systems, employment relations and associated legislative frameworks.

The aim of the unit is to enable students to understand and be able to apply principles of effective HRM in order to enhance sustainable organisational performance and contribute to organisational success, holding business outcomes and people outcomes in equal balance. Students will apply HR practices in a work-related context, utilising their knowledge and practising skills and behaviours in relevant professional areas, including resourcing, talent planning and recruitment, learning and development and employee engagement.

On completion of the unit, students will understand the purpose and scope of HRM activities. They will be able to apply a range of people-management skills to enhance the performance of an organisation by finding solutions to people-related problems.

## **Learning Outcomes**

By the end of this unit the student will be able to:

- LO1 Explain the impact of the role of HRM in creating sustainable organisational performance and contributing to business success
- LO2 Assess the contribution of HRM in recruiting and retaining talent and skills to achieve business objectives
- LO3 Examine how external and internal factors can affect HRM decision making in relation to organisational development
- LO4 Apply HRM practices in a work-related context for improving sustainable organisational performance.

## Essential Content

### LO1 **Explain the impact of the role of HRM in creating sustainable organisational performance and contributing to business success**

#### *Nature and scope of HRM:*

Definitions of HRM.

The different specialist areas of HR, e.g. resourcing, employee relations, organisational development and design, learning and development.

Generic HR competencies, e.g. design of people strategies, creating people management policies, employee engagement, supporting organisational change.

Typical roles in HR and responsibilities, e.g. HR advisor, HR officer, people data analyst, HR assistant, employee relations officer.

Specific skills, e.g. communication skills across all levels of the organisation, adaptability to changing work priorities and patterns, displaying tenacity and being proactive, keeping ahead of trends and changing legal and policy requirements.

Working within an ethical framework and within recognised best practice.

#### *Strategic HRM:*

The development of strategic HRM in terms of business vision, mission statement, business objectives and strategic aims.

The nature and use of data analytics to support achievement of business objectives and meeting strategic aims.

Hard and soft models of HRM.

#### *Organisational performance:*

The impact of HRM on organisational performance, e.g. effective recruitment and selection to meet specific knowledge and skills requirements, growing internal talent through training and development and focusing on longer-term resource issues.

Performance management systems to support high-performance working.

Methods to measure organisational and individual performance.

Types of pay and reward systems.

## LO2 **Assess the contribution of HRM in recruiting and retaining talent and skills to achieve business objectives**

### *Resourcing the organisation:*

Workforce planning and application of data analytics.

Assessing skills and capabilities using audits and gap analysis for identifying talent and skills gaps.

Workforce trends, including flexible working arrangements, remote working, virtual meetings and social distancing measures.

Addressing diversity and inclusion.

Types of labour market and skills shortages affecting recruitment and hard-to-fill vacancies, e.g. lack of digital skills, leadership skills, data analytical skills.

Impact of relevant legislation, including data protection.

### *Recruitment and selection:*

Different models of recruitment and selection.

Sources of recruitment, e.g. internal vs. external.

Achieving cultural diversity in recruitment.

Stages in recruitment and selection.

Different types of selection methods, including competence-based selection.

Legal frameworks and regulatory standards.

### *Retention:*

Factors influencing retention, including the influence of the culture of the organisation on retention, selecting the right talent and performance management.

Onboarding and induction, the value of effective employee socialisation.

Role of line managers in employee engagement and performance management.

Managing attrition, restructuring and redeployment, redundancy of employees.

Dealing with employee disciplinarys and misconduct cases that end in dismissal.

### **LO3 Examine how external and internal factors can influence HRM decision making in relation to organisational development**

*External and internal factors:*

Identifying factors external to the organisation that influence HRM:

- impact of external factors on organisational performance, including the skills gaps and labour force trends
- impact of globalisation on HR policies for equality, diversity and raising cultural awareness and sensitivity within the workplace
- impact of legal and regulatory frameworks.

Internal factors, including:

- the impact and influence of leadership styles on organisational transformation, culture and employee experience
- learning and development, how people learn, impact of digital learning
- the relationship between organisational culture and strategic planning and development
- impact of motivation upon performance.

*Organisational development:*

The changing work environment, e.g. need for flexible organisations and employees with adaptable skills and competencies.

Characteristics of agile organisations.

Digital transformation of HR functions, e.g. reporting dashboards and predictive models for advanced people analytics, Artificial Intelligence (AI) for talent acquisition, cloud capabilities for measuring team performance and calibration decision making.



**LO4 Apply HRM practices in a work-related context for improving sustainable organisational performance.**

*Job descriptions and person specification:*

Referencing workforce planning.

Assessing the need to create and fill a post.

Preparing different types of job description, including competence based and task based, assessing the merits of each type.

Identifying the qualities and attributes relevant to the design of a person specification.

Designing a person specification relevant to a chosen job role.

*Recruitment and selection in practice:*

Designing and placing job advertisements.

Shortlisting and processing applications.

Interviewing preparation and best practice.

Selection best practice.

*Performance management:*

Performance management aligned to workforce planning.

Methods of financial and non-financial rewards.

Staff development, e.g. continuous professional development and training.

Providing support and maintaining wellbeing.

Embedding learning and reflective practice in personal development planning.

Managing under performance, disciplinary, industrial disputes and grievance procedures.

Succession planning.

*Employee relationship:*

The employment relationship.

The psychological contract.

Employee voice and engagement.

Managing performance to attain competitive advantage and increase job satisfaction.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>LO1</b> Explain the impact of the role of HRM in creating sustainable organisational performance and contributing to business success		<b>LO1 and LO2</b>  <b>D1</b> Critically evaluate the strengths and weaknesses of HRM in relation to creating sustainable organisational performance and achieving business objectives.
<b>P1</b> Explain the main areas of HRM in their contribution to creating sustainable performance.  <b>P2</b> Review the effects of the changing nature of organisations on human resources skills and knowledge.	<b>M1</b> Compare areas of HRM to create sustainable organisational performance.  <b>M2</b> Examine HRM in relation to the changing nature of the modern business organisation.	
<b>LO2</b> Assess the contribution of HRM in recruiting and retaining talent and skills to achieve business objectives		
<b>P3</b> Review relevant HRM practices in relation to recruitment and retention of employees for the achievement of business objectives.	<b>M3</b> Evaluate the use of HRM practices in recruitment and retention in relation to the importance of the labour market.	
<b>LO3</b> Examine how external and internal factors can affect HRM decision making in relation to organisational development		<b>D2</b> Evaluate key factors affecting HRM decision making to make valid recommendations.
<b>P4</b> Investigate the external and internal factors that affect HRM decision making to support organisational development.	<b>M4</b> Discuss the key external and internal factors that affect HRM decision making, using relevant organisational examples to illustrate how they support organisational development.	

Pass	Merit	Distinction
<b>LO4</b> Apply HRM practices in a work-related context for improving sustainable organisational performance.		<b>D3</b> Determine strengths and weaknesses of HRM practices to make recommendations for improving sustainable organisational performance.
<b>P5</b> Apply HRM practices in a work-related context, using specific examples to demonstrate improvement to sustainable organisational performance.	<b>M5</b> Illustrate how the application of specific HRM practices in a work-related context can improve sustainable organisational performance.	

## Recommended Resources

### Textbooks

ARMSTRONG, M. and TAYLOR, S. (2020) *Armstrong's Handbook of Human Resource Management Practice*. 15th Ed. London: Kogan Page.

BRATTON, J. and GOLD, J. (2017) *Human Resource Management: Theory and Practice*. 6th Ed. Basingstoke: Palgrave.

TORRINGTON, D. et al. (2018) *Human Resource Management*. 10th Ed. London: Pearson.

LEATHERBARROW, C. and FLETCHER, J. (2018) *Introduction to Human Resource Management*. 4th Ed. Kogan Page.

### Websites

<a href="http://www.cipd.co.uk">www.cipd.co.uk</a>	Chartered Institute for Personnel and Development (General reference)
<a href="http://www.hr-guide.com">www.hr-guide.com</a>	HR Guides (General reference)
<a href="http://www.personneltoday.com">www.personneltoday.com</a>	<i>Personnel Today</i> Topics and webinars (General reference)
<a href="http://www.shrm.org">www.shrm.org</a>	Society for Human Resource Management (General reference)

### Links

This unit links to the following related units:

*Unit 7: Business Law*

*Unit 12: Executive Recruitment Solutions*

*Unit 13: Human Capital Management*

*Unit 20: Organisational Behaviour*

*Unit 30: Resource and Talent Planning*

*Unit 31: Employee Relations*

*Unit 32: Strategic Human Resource Management*

## Unit 4: Leadership and Management

<b>Unit code</b>	<b>L/618/5036</b>
<b>Unit type</b>	<b>Core</b>
<b>Unit level</b>	<b>4</b>
<b>Credit value</b>	<b>15</b>

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### Introduction

The ability to lead and manage effectively is highly sought after by industry, as employers seek to produce and develop managers who can motivate, enthuse and build respect throughout their workforce. The hard and soft skills required by leaders and managers are frequently highlighted by employers as skills gaps in recruitment. Developing these skills will help students to meet career aspirations in leadership and management.

The aim of this unit is to help students to understand the difference between the function of a manager and the role of a leader. Students will consider the characteristics, behaviours and traits that support effective management and leadership. Students will learn about the theories that have shaped the understanding of leadership and management and how these have provided a guide to action for managers and leaders who want to secure success for their businesses. Students will look at leadership styles, how and why they are used and the extent to which they are effective.

This unit also gives students an understanding of motivational strategies. They will develop motivational strategies covering intrinsic and extrinsic aspects of motivation. Finally, students will evaluate the importance of managing performance in achieving continuous improvement.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Examine leadership and management theories and principles, and their impact on the effectiveness of an organisation
- LO2 Review the influence of different leadership and management styles on the culture of organisations
- LO3 Develop a motivational strategy to optimise organisational performance
- LO4 Apply leadership and management approaches to managing performance to ensure continuous improvement.

## Essential Content

### LO1 Examine leadership and management theories and principles, and their impact on the effectiveness of an organisation

#### *Definitions of management:*

Defining management, what management is (Fayol), what managers should do (Peters) and key roles (Mintzberg).

Key skills and competences of management, e.g. team dynamics, planning, decision making, strategic mindset, problem solving, communicating (verbal and non-verbal), motivating, delegating, managing discipline and dealing with conflict.

Management activities, e.g. planning, organising, motivating and controlling.

Approaches to management, e.g. task orientation and relationship orientation.

#### *Theories of management:*

Classical theorists, including Administrative (Fayol) and Scientific (Taylor).

Management as a function of organisations (Handy).

Modern management theorists, e.g. Porter, Kotler and Handy.

#### *Theories and definitions of leadership:*

Key theories and theorists, including:

- transformational (Burns)
- transactional (Bennis, Bass)
- situational/contingency (Fiedler, Vroom and Yetton, Hersey and Blanchard)
- charismatic (Conger, Kanungo)
- emotional (Goleman's six styles).

Leadership skills, e.g. communication, delegation, inspirational motivation, positive attitude, trustworthiness, creative thinking and innovative problem solving.

Competences, e.g. giving and receiving feedback, taking responsibility for both success and failure, managing cultural sensitivity and diversity, global outlook and agility.

The hard skills of management versus the soft skills of leadership.

Approaches to leadership, e.g. situational, transformational and inspirational.

*Impacts of leadership and management:*

Positive impacts for improving business performance, effective management of resources, innovation.

Negative impacts, e.g. loss of competitive advantage, stagnation and decline.

## **LO2 Review the influence of different leadership and management styles on the culture of organisations**

*Leadership styles:*

Different types of leadership, including Tannenbaum and Schmidt's Continuum of Leadership Styles, Linkert's Systems 1–4, and McGregor's Theory X/Theory Y.

Adapting leadership styles to apply in different business situations and the required hard and soft skills.

Impacts of leadership and management styles on decision making in a business organisation.

*Types of culture:*

Defining culture and types of culture, including:

- Four types, Power, Role, Task, Person (Handy)
- Tough-Guy Macho, work hard/play hard, bet-your-company, Process (Deal and Kennedy).

The importance and value of culture for work ethic, organisational performance, health of the organisation.

*Factors influencing culture:*

Factors that influence the development of an organisational culture, e.g. mission, vision and values.

The impact of emerging digital technologies, e.g. social digital connectivity and global dynamic complexity on organisational structure, location, infrastructure, internal rules and procedures.

The impact of digital technologies on leadership and management attitudes and behaviours, e.g. drive and flexibility to direct and navigate business through disruptive innovation, empowering virtual teams and communities, agility to balance improving efficiency while promoting innovation.

The importance of leadership and management styles in setting and embedding organisational culture.



### **LO3 Develop a motivational strategy to optimise organisational performance**

#### *Theories of motivation:*

Content theories, including Maslow, Herzberg, McClelland and application to different work situations.

Process theories, including Expectancy theory (Vroom), Equity theory (Adams) and Goal Theory (Locke) and application to different work situations.

Impacts of motivation on organisational performance:

Implications for improved job satisfaction, performance and productivity, including different variables, e.g. social, cultural organisational and environmental.

#### *Motivational Strategy:*

Financial and non-financial strategies, e.g. to recognise and reward performance, encourage collaborative team working, to embed praise and frequent feedback to individuals and encourage creativity and innovation.

Different strategies for addressing and managing unsuccessful performance and demotivated employees.

Elements of a comprehensive strategy e.g. providing a range of incentives to meet different personalities, creating positive reinforcement and equality.

### **LO4 Apply leadership and management approaches to managing performance to ensure continuous improvement**

#### *Leadership and management approaches:*

The advantages and disadvantages of different management approaches, including task orientation and relationship orientation.

The advantages and disadvantages of different leadership approaches, including situational, transformational and inspirational.

Communication processes and strategies applied in different business situations, e.g. dealing with conflict, resistance to change, cultural awareness.

Defining capabilities and skills for a transformational environment, e.g. multicultural perspectives, coaching and mentoring, aligning to changing business goals.

*Definition of performance management:*

Definition of performance management and the purpose of performance management to improve individual and team performance.

Different approaches, e.g. annual appraisal versus continuous performance management, including weekly check-ins/ on-the-job conversations.

Qualitative and quantitative measures of effectiveness:

Qualitative measures, e.g. satisfaction rates, motivation levels, success of training and development, attitude.

Quantitative measure, to include incidence of sickness, absenteeism, accidents at work, timekeeping, meeting deadlines, accuracy of work carried out, wastage, output, productivity.

*Methods of rewarding good performance:*

The financial and non-financial methods available to the organisation.

The influence of variables, including size, location, competitiveness of the organisation on the reward methods available.

The influence of leadership and management approaches on rewarding good performance.

## Learning Outcomes and Assessment Criteria

Pass		Merit	Distinction
<b>LO1</b> Examine leadership and management theories and principles, and their impact on the effectiveness of an organisation			<b>LO1 and LO2</b>  <b>D1</b> Critically evaluate the impact of different approaches to leadership and management.
<b>P1</b> Discuss different theories of leadership in relation to the management activities in different organisations.  <b>P2</b> Explore different theories of management in relation to the management and leadership activities in different organisations.	<b>M1</b> Analyse the impact of the application of leadership and management theories on the effectiveness of a large organisation.		
<b>LO2</b> Review the influence of different leadership and management styles on the culture of organisations			
<b>P3</b> Assess different leadership and management styles and their application in a range of business situations in different organisations.  <b>P4</b> Examine the factors that influence the development of the culture in organisations.	<b>M2</b> Compare the impact of leadership and management styles on decision making in different organisations.  <b>M3</b> Evaluate the importance of organisational culture on the performance of different organisations.		
<b>LO3</b> Develop a motivational strategy to optimise organisational performance			<b>D2</b> Produce a comprehensive motivational strategy that effectively addresses all variables of motivation to enhance organisational performance.
<b>P5</b> Produce a motivational strategy for an organisation that supports optimal achievement of organisational objectives.	<b>M4</b> Produce a detailed motivational strategy for an organisation that addresses intrinsic and extrinsic motivation.		

Pass	Merit	Distinction
<b>LO4</b> Apply leadership and management approaches to managing performance to ensure continuous improvement.		<b>D3</b> Make recommendations to improve performance management that will ensure continuous improvement.
<b>P6</b> Apply to a range of business situations, appropriate leadership and management approaches for managing performance and continuous improvement.	<b>M5</b> Assess how leadership and management approaches for managing performance supports continuous improvement.	

## Recommended Resources

### Textbooks

ADAIR, J. (2019). *Develop Your Leadership Skills: Fast, Effective Ways to Become a Leader People Want to Follow*. Kogan Page.

KELLY, P. and COLE, G. (2020) *Management: Theory and Practice*. 9th Ed. Cengage.

MULLINS, L. J. (2019) *Organisational Behaviour in the Workplace* 12th Ed. Harlow: Pearson.

ORTI, P and MIDDLEMISS, M. (2019). *Thinking Remote. Inspiration for Leaders of Distributed Teams*. Virtual Not Distance

### Websites

<a href="http://www.businesstrainingworks.com">www.businesstrainingworks.com</a>	Business Training Works Resources (General reference)
<a href="http://www.managementstudyguide.com">www.managementstudyguide.com</a>	Management Study Guide Management Functions (General reference)
<a href="http://www.managementtoday.com">www.managementtoday.com</a>	Management Today Leadership News and industry articles (General reference)
<a href="http://www.mindtools.com">www.mindtools.com</a>	Mind Tools Leadership (General reference)
<a href="http://www.tedtalks.com">www.tedtalks.com</a>	TED Talks Business and technology (Video resources)

### Links

This unit links to the following related units:

*Unit 20: Organisational Behaviour*

*Unit 24: Understanding and Leading Change*

*Unit 46: Developing Individuals, Teams and Organisations*

## Unit 5: Accounting Principles

<b>Unit code</b>	<b>Y/618/5038</b>
<b>Unit type</b>	<b>Core</b>
<b>Unit level</b>	<b>4</b>
<b>Credit value</b>	<b>15</b>

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### Introduction

Management accounting is a profession that supports management decision making, planning and performance management systems. Management accountants provide expertise in financial reporting and control to assist management in the formulation and implementation of an organisation's strategy by providing appropriate financial information and undertaking related accounts administration.

The overall aim of this unit is to introduce fundamental accounting principles that underpin financial operations and support good and sustainable decision making in any organisation. Students will develop a theoretical and practical understanding of a range of financial and management accounting techniques.

On successful completion of this unit, students will be able to assist senior colleagues in producing and analysing budgets, drawing up simple financial statements and using financial ratios to interpret performance. Students will also explore wider aspects of accountancy, especially ethics, transparency and sustainability, and gain fundamental knowledge and skills that will enable them to progress to a higher level of study.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Examine the context and purpose of accounting
- LO2 Prepare basic financial statements for unincorporated and small business organisations in accordance with accounting principles, conventions and standards
- LO3 Interpret financial statements
- LO4 Prepare budgets for planning, control and decision making using spreadsheets.

## Essential Content

### LO1 Examine the context and purpose of accounting

*The accounting function in an organisation:*

Different branches of accounting, e.g. financial, management, auditing, tax and forensic accounting.

Career opportunities in accounting and roles and responsibilities, e.g. accounts clerk, accounts assistant, qualified accountant.

Roles in commercial finance, e.g. cost analyst, business controller, pricing professionals and the global business services, e.g. purchase to pay (P2P) professionals and report to report (R2R) professionals.

Skills required for positions in accountancy and finance, e.g. numerical skills, problem solving, integrity, negotiation, customer service.

Key skills and competences for accounting roles, e.g. managing the sale and purchase ledger, ensuring accounts are up to date, supplier reconciliations, inputting sales invoices on an accounts system and recording payments received.

Users and uses of financial information.

Interrelationships between the accounting and finance functions of other areas of the organisation and increasingly complex operating environments.

*Context and purpose of financial and management accounting:*

Purpose and scope of accounting, to include recording, reporting, and analysing information to inform decision making.

Role of supporting and new information technologies to support accounting and decision making.

Management accounting information, including systems, e.g. cost accounting, inventory management, job costing.

The benefits (streamline reporting, accuracy), risks and limitations (security threats, loss of data through power outages) of management accounting information.

Presenting financial information in a reliable, accurate, timely and persuasive way to satisfy needs of internal and external stakeholders.

Accounting in an increasingly complex and fast-changing business environment, e.g. increased regulation and accountability, role of International Financial Reporting Standards (IFRS), risk management, reputation, sustainability, governance.

Pros and cons of shared service centres and outsourcing accounting services.



## **LO2 Prepare basic financial statements for unincorporated and small business organisations in accordance with accounting principles, conventions and standards**

### *The accounting concept:*

The accounting concept as the foundation for all financial statements.

### *Capital and revenue items:*

Classifying revenue and capital income and expenditures.

### *Producing basic financial statements:*

Preparation of a profit and loss statement (income statement) and balance sheet (statement of financial position) for unincorporated organisations from a given trial balance.

Different types of income statements for sole trader, partnership and not for profit organisations.

Adjustments required for accruals, prepayments, bad debts, depreciation.

Value of using digital software for accounting and preparing for financial statements, e.g. QuickBooks, Sage, Xero.

## **LO3 Interpret financial statements**

### *Importance and purpose of analysing financial statements:*

To communicate financial positions and intentions with a range of stakeholders.

### *Ratio analysis:*

Calculate profitability, liquidity, efficiency and investment ratios from given data.

Using calculated ratios to evaluate organisational performance.

Apply and critique relevant benchmarks, including time series, competitors, sector and internal.

### *Limitations of ratio analysis:*

Ratio analysis as one means of measuring and evaluating the performance of an organisation, e.g. use of qualitative/non-financial measures. Limitations of using ratios as a performance measurement tool.

The interrelationships between ratios.

*Importance and purpose of analysis of financial statements:*

The interpretation and analysis of financial statements in the business environment.

Interpreting the relationship between the elements of the financial statements, profitability, liquidity, efficient use of resources and financial position.

Interpreting financial statements for meeting key performance indicators (KPIs) and sustainable performance.

Application of financial statements in different business contexts and value of presenting to end user of the financial statements.

**LO4 Prepare budgets for planning, control and decision making using spreadsheets**

*Nature and purpose of budgeting:*

Budgets as a key management accounting tool.

Definitions and reasons organisations use budgets.

Stages in the budgeting process, master and functional budgets.

Corrective action to inform resource allocation and decision making.

*Budget preparation and budgetary control:*

Importance, role and limitations of budgets in controlling activity.

The principal budget factor and budget types, including fixed, flexible, zero based, incremental, rolling, activity based, value proposition.

Variance analysis.

The steps for the preparation of a cash budget.

*Producing a spreadsheet:*

The numerical and other information requirements for a spreadsheet and how it should be structured to meet user needs.

Using a spreadsheet and techniques to enter, edit and organise numerical and other data.

How to format spreadsheet cells, rows, columns and worksheets effectively using appropriate tools and techniques

Use of formulas and filters to enter, edit and present numerical data.

Visual representation of data and data analysis using pie charts, bar charts and graphs.

Inserting spreadsheet data into Word® documents.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>LO1</b> Examine the context and purpose of accounting		<b>D1</b> Critically evaluate the role of accounting in informing decision- making to meet organisational, stakeholder and societal needs within complex operating environments.
<b>P1</b> Examine the purpose of the accounting function within an organisation.  <b>P2</b> Assess the accounting function within the organisation in the context of regulatory and ethical constraints.	<b>M1</b> Evaluate the context and purpose of the accounting function in meeting organisational, stakeholder and societal needs and expectations.	
<b>LO2</b> Prepare basic financial statements for unincorporated and small business organisations in accordance with accounting principles, conventions and standards.		<b>LO2 and LO3</b>  <b>D2</b> Critically evaluate financial statements to assess organisational performance using a range of measures and benchmarks to make justified conclusions.
<b>P3</b> Prepare financial statements from a given trial balance for sole traders, partnerships and not-for-profit organisations, to meet accounting principles, conventions and standards.	<b>M2</b> Produce financial statements from a given trial balance, making appropriate adjustments.	
<b>LO3</b> Interpret financial statements		
<b>P4</b> Calculate and present financial ratios from a set of final accounts.  <b>P5</b> Compare the performance of an organisation over time using financial ratios.	<b>M3</b> Evaluate the performance of an organisation over time, using financial ratios with reference to relevant benchmarks.	

Pass	Merit	Distinction
<b>L04</b> Prepare budgets for planning, control and decision making using spreadsheets.		<b>D3</b> Justify budgetary control solutions and their impact on organisational decision making to ensure efficient and effective deployment of resources.
<b>P6</b> Prepare a cash budget from given data for an organisation using a spreadsheet.  <b>P7</b> Discuss the benefits and limitations of budgets and budgetary planning, and control for an organisation.	<b>M4</b> Identify corrective actions to problems revealed by budgetary planning and control for effective organisational decision making.	

## Recommended Resources

### Textbooks

ATRILL, P. and McLANEY, E. (2018) *Accounting and Finance for Non-Specialists*. 11th Ed. Harlow: Pearson.

DRURY, C. (2015) *Management and Cost Accounting*. 9th Ed. Cengage Learning.

SEAL, W. et al (2018) *Management Accounting*. 6th Ed. Maidenhead: McGraw-Hill.

WEETMAN, P. (2019). *Financial and Management Accounting: An Introduction*. Harlow: Pearson.

### Websites

www.accountingcoach.com	Accounting Coach Online free courses (General reference)
www.accaglobal.com	Association of Chartered Certified Accountants (General reference) Chartered Institute of Management Accountants
www.cimaglobal.com	Tutor Resource Hub Corporate Finance Institute Resources
www.corporatefinanceinstitute.com	Knowledge (General reference)

### Links

This unit links to the following related units:

*Unit 10: Recording Financial Transactions*

*Unit 21: Financial Reporting*

*Unit 22: Management Accounting*

*Unit 23: Financial Management*

*Unit 29: Managing and Running a Small Business*

## Unit 6: Managing a Successful Business Project (Pearson Set)

Unit code	D/618/5039
Unit type	Core
Unit level	4
Credit value	15

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### Introduction

This unit is a ***Pearson-set unit***. The project brief will be set by the centre, based on a theme provided by Pearson (this will change annually). The theme and chosen project within the theme will enable students to explore and examine a relevant and current topical aspect of business in the context of the business environment.

The skills of project management are highly sought after by employers in all areas of business, as the ability to plan, procure and execute a business project efficiently requires a range of specific skills in leadership, time management, problem solving, budgeting and communication.

The aim of this unit is to offer students an opportunity to demonstrate the skills required for managing and implementing a ***small-scale business project***. They will undertake independent research and investigation for carrying out and executing a business project that meets appropriate business aims and objectives.

On successful completion of this unit, students will have the confidence to engage in decision making, problem solving and research activities using project-management skills. They will have the fundamental knowledge and skills to enable them to investigate and examine relevant business concepts in a work-related context, determine appropriate outcomes, decisions or solutions and present evidence to various stakeholders in an acceptable and understandable format.

**\*Please refer to the accompanying *Pearson-set Assignment Guide and Theme and Topic Release* document on HN Global for further support and guidance on the delivery of the Pearson-set unit**

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Explain the key stages of the project lifecycle that should be considered when project managing
- LO2 Produce a Project Management Plan (PMP) for a business project using primary and secondary research methods
- LO3 Implement the Project Management Plan (PMP) to communicate results from the research and make conclusions from the evidence of findings
- LO4 Reflect on value gained from implementing the project and the project management process.

## Essential Content

### LO1 Explain the key stages of the project lifecycle that should be considered when project managing

#### *Project management:*

Defining project management.

The project lifecycle and the stages of the project lifecycle, e.g. initiation, planning, execution and closure.

The advantages of using project management and why it is important.

Roles in project managing, e.g. assistant project manager, junior project manager, project team leader and responsibilities to drive through the project and achieve required outcomes.

Project management skills, including good planning, organising, leadership and communication skills.

Compare different organisational approaches to project management using case studies.

#### *Project management plans:*

Scoping a project – defining objectives, scope, purpose and deliverables to be produced.

Developing the project plan, including planning for timescales and time management, cost, quality, change, risk, stakeholder communication.

#### *Project management tools:*

Different types of software and application used to support project management, e.g. Microsoft Project for tracking, managing and analysing projects and Asana for holistic project management and integration of workload, inbox, calendars and tasks.

Use of project-planning tasks and tracking tools, e.g. Trello, Smartsheet and Excel spreadsheets.

Tools and techniques used to create activity plans, work breakdown structure (WBS) and Gantt charts for effective planning.



*Research methods and analysis:*

Purpose of research in a project.

Research ethics, reliable research and valid research.

Selecting appropriate sample population and methods for information gathering, data collection and material resourcing.

Use of secondary research to inform a primary study.

**LO2 Produce a Project Management Plan (PMP) for a business project using primary and secondary research methods**

*Research methods and strategies:*

Primary and secondary research and data collection.

Defining qualitative and quantitative methods.

Selecting an appropriate strategy for the research, e.g. questionnaires, interviews, observation.

Use of monitoring tools, including WBS and Gantt charts.

*Field work:*

Different strategies that can be used to conduct research, e.g.:

- interviews, questionnaires, experiments
- selecting a sample of the consumer market, businesses or individuals
- sampling approaches and techniques, including probability and non-probability sampling.

Factors to consider, including:

- aim and objectives
- deliverables
- quality
- risk
- stakeholder communication
- resources.

### **LO3 Implement the Project Management Plan (PMP) to communicate results from the research and make conclusions from the evidence of findings**

#### *Analysis and evaluation of findings and data gathered:*

Digital techniques and tools to analyse and evaluate the secondary and primary data gathered, e.g. online surveys (SurveyMonkey, Google Forms, Zoho Survey) and spreadsheets (Excel templates).

Techniques for data analysis, e.g. coding, charts and graphs, trend analysis.

Techniques to create pictograms, pie charts, bar charts, frequency curves, histograms, line graphs, scattergrams.

Use of scatter (XY) graphs and linear trend lines for forecasting (reliability).

Techniques for creating tables to simplify and rationalise the presentation of data to aid understanding of the information within data.

The benefits of data validity and maintaining objective mindset to provide objective results.

#### *Communicating results:*

Types of communication methods, e.g. written, verbal and the medium, e.g. different report formats, online, presentation.

Multi-media presentation tools: PowerPoint, Prezi, Google Slides, Microsoft Sway, Adobe Spark.

Video conferencing e.g. Zoom, Adobe Connect, Google Hangouts, Slack video calls.

#### *Communicating skills:*

Verbal and non-verbal communication skills required to meet audience requirements, e.g. eye contact, pitch, pace.

Communicating and persuading internal/external stakeholders, e.g. negotiation and sales skills.

Presentation, behaviour and conduct of presenter, e.g. attire, attitude, professionalism, suitable for audience, well prepared and organised.

Different communication formats to address different audience needs and expectations and appropriateness for meeting cultural diversity of an audience.

#### *Convincing arguments:*

Presenting logical and convincing findings and outcomes as part of the project process.

Developing evaluative conclusions.

**LO4 Reflect on value gained from implementing the project and the project management process.**

*Reflection for learning and practice:*

Differences between reflecting on performance and evaluating a project – the former considers the research process, information gathering and data collection, the latter the quality of the research argument and use of evidence.

The cycle of reflection and using reflection to inform future behaviour.

*Reflective writing:*

Writing to avoid generalisation, focusing on personal development and the research journey in a critical and objective way.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>LO1</b> Explain the key stages of the project lifecycle that should be considered when project managing		<b>D1</b> Critically evaluate the project-management process, PMP and research methods for gathering information and data collection.
<b>P1</b> Explain the stages of the project lifecycle (PLC) and their importance to the success of a project. <b>P2</b> Examine the factors to be considered when compiling a project management plan (PMP). <b>P3</b> Examine a range of research methods and strategies and their importance to project management.	<b>M1</b> Evaluate the stages of the PLC and the factors, (deliverables, quality, risk, communication and resources) to be considered in a PMP. <b>M2</b> Evaluate a range of research methods and strategies for gathering information and data collection.	
<b>LO2</b> Produce a Project Management Plan (PMP) for a business project using primary and secondary research methods		<b>D2</b> Justify the choices made in the design of the PMP for completing the aims and objectives of the project.
<b>P4</b> Produce a PMP that covers, aim, objectives, deliverables, quality, risk, communication resources and research methods. <b>P5</b> Produce a work breakdown structure and a schedule to provide timeframes and stages for completion.	<b>M3</b> Produce a detailed PMP, and schedule for monitoring and completing the aims and objectives of the project.	
<b>LO3</b> Implement the Project Management Plan (PMP) to communicate results from the research and make conclusions from the evidence of findings		<b>LO3 and LO4</b> <b>D3</b> Critically reflect on the findings from the research and the project management process in supporting stated objectives and own learning.
<b>P6</b> Conduct a business project as stated within the PMP and communicate findings. <b>P7</b> Present data to draw valid and meaningful conclusions and recommendations from data analysis.	<b>M4</b> Justify conclusions and recommendations drawn from data analysis and findings to meet the stated project objectives.	

Pass	Merit	Distinction
<b>LO4</b> Reflect on value gained from implementing the project and the project management process.		
<b>P8</b> Reflect on the value of undertaking the business project to meet stated objectives and own learning and performance.	<b>M5</b> Evaluate the project management process to meet stated objectives and support own learning and performance.	

## Recommended Resources

### Textbooks

- DINSMORE, P. and CABANIS-BREWEN, J. (2018). *The AMA Handbook of Project Management*. 5th Ed. AMACON.
- FLICK, U. (2020) *Introducing Research Methodology: A Beginner's Guide to Doing a Research Project*. 3rd Ed. London: SAGE.
- GRAY, D. (2017) *Doing Research in the Real World*. 4th Ed. London: SAGE.
- MAYLOR, H. (2021) *Project Management*. 5th Ed. Harlow: Pearson.
- SAUNDERS, M., LEWIS, P. and THORNHILL, A. (2019) *Research Methods for Business Students*. 8th Ed. Harlow: Pearson.

### Websites

<a href="http://www.asana.com">www.asana.com</a>	Asana Free project-management tools (General reference)
<a href="http://www.projectmanagement.com">www.projectmanagement.com</a>	Project management (General reference)
<a href="http://www.projectsmart.co.uk">www.projectsmart.co.uk</a>	Project Smart Articles Tools Glossary (General reference)
<a href="http://www.trello.com">www.trello.com</a>	Trello Free project-management tools

### Links

This unit links to the following related unit:

*Unit 19: Research Project*

# Unit 16: Managing the Customer Experience

**Unit code** H/618/5057

**Unit level** 4

**Credit value** 15

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## Introduction

The aim of this unit is to give students background knowledge and understanding of how hospitality businesses manage the customer experience – from the initial needs analysis through to after-sales follow-up.

Students will map the journey that a customer makes through a hospitality business, identifying crucial touch points and recognising how these touch points can be managed to optimise the customer's experience.

Students will consider how technology is changing the way that customers interact with hospitality businesses and how digital initiatives should complement existing customer journeys while recognising that online and offline consumers are distinctly different. Students can then use this knowledge to provide customer service in business and services and in an online context to meet required business service standards.

## **Learning Outcomes**

By the end of this unit students will be able to:

- LO1 Explain the needs and expectations of market segments for products and/or services of a given business organisation
- LO2 Produce a customer experience map to create business opportunities and optimise customer touch points
- LO3 Investigate the impacts of digital technology on customer relationship management
- LO4 Apply effective customer experience management within an organisational context to maximise customer engagement.



## Essential Content

### LO1 **Explain the needs and expectations of market segments for products and/or services of a given business organisation**

#### *Target markets:*

Defining the customer profile and characteristics of the target audience through market segmentation.

Use of individual characteristics such as age, gender, income, occupation, geographic location, education, ethnicity.

#### *Customer behaviours and attitudes:*

Understanding the customer behaviours and attitudes of different market segments to build brand loyalty and trust.

The four clusters of emotions that drive or destroy value (Shaw).

#### *Engagement factors:*

Different opportunities for customer engagement.

Onboarding and post-boarding strategies for customer engagement.

Different factors that drive and influence customer engagement, e.g. compelling offers, competitive prices and accessibility.

### LO2 **Produce a customer experience map to create business opportunities and optimise customer touch points**

#### *The customer journey and experience mapping:*

Definition of the customer journey experience map.

The stages of the customer journey and how the customer journey map supports businesses to understand how to interact with customers.

Deconstructing the customer journey and building the customer narrative to provide strategic insights.

The use of experience mapping as a strategic process of capturing and communicating complex customer interactions.

#### *Touch points:*

Identifying critical moments when customers interact with the organisation pre-, during and post the customer experience.

The key building blocks of doing, feeling and thinking.

### **LO3 Investigate the impacts of digital technology on customer relationship management**

#### *CRM systems:*

Definition of Customer Relationship Management (CRM) systems.

Different types of CRM systems, e.g. operational, analytical, and how each of these contribute to the management of customer relationships.

#### *Online customer experiences:*

Business interactions with current and potential customers via a choice of integrated digital marketing channels.

Digital content and the speed and consistency of exchanges and transactions impacts on individual businesses.

#### *Social media:*

The use of different social media platforms to raise awareness of products and services and communicate with customers.

### **LO4 Apply effective customer experience management within an organisational context to maximise customer engagement**

#### *CEM strategies:*

Definition of Customer Experience Management (CEM).

The goals of CEM.

The use of touch point analysis.

The stages of the customer experience strategy: assessing market needs, experience mapping, identifying and designing the brand experience and structuring touch points to measure and evaluate.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>L01</b> Explain the needs and expectations of market segments for products and/or services of a given business organisation		<b>D1</b> Evaluate a broad range of different target customer groups' needs and expectations in terms of customer engagement for a product and/or service.
<b>P1</b> Explain the value and importance of understanding the needs, wants and preferences of target customer groups for a business organisation.  <b>P2</b> Explore the different factors that drive and influence customer engagement of different target customer groups.	<b>M1</b> Review how customer engagement factors determine customer onboarding strategies for different target customer groups.	
<b>L02</b> Produce a customer experience map to create business opportunities and optimise customer touch points		<b>D2</b> Analyse how customer touch points influence the behaviour, responses and actions of its customers to enhance the customer experience.
<b>P3</b> Create a customer experience map for a selected business organisation.  <b>P4</b> Discuss how the customer touch points throughout the customer experience create business opportunities.	<b>M2</b> Create a detailed customer experience map that charts the customer journey and examines the activities and actions taken at each customer touch point, to create business opportunities.	
<b>L03</b> Investigate the impacts of digital technology on customer relationship management		<b>D3</b> Critically evaluate CRM systems used in businesses for acquisition and retention of customers.
<b>P5</b> Examine how digital technology is employed in managing the customer experience providing specific examples of customer relationship management (CRM) systems.	<b>M3</b> Evaluate how digital technologies employed in managing the customer experience are changing CRM systems to acquire and retain customers effectively.	

Pass	Merit	Distinction
<b>LO4</b> Apply effective customer experience management within an organisational context to maximise customer engagement.		<b>D4</b> Evaluate the delivery of customer service strategies and communication, justifying and making valid recommendations for improvement in developing a quality customer experience.
<b>P6</b> Illustrate customer service strategies in an organisational context.  <b>P7</b> Demonstrate how customer service strategies create and develop the customer experience in a way that meets the needs of the customer and required business standards.	<b>M4</b> Review the application of customer service strategies in an organisation and make recommendations for improvement.	

## Recommended Resources

### Textbooks

BUTTLE, F. (2015) *Customer Relationship Management: Concepts and Technologies*. 3rd Ed. Oxford: Routledge.

GOODMAN, J. (2019) *Strategic Customer Service: Managing the Customer Experience to Increase Positive Word of Mouth, Build Loyalty, and Maximize Profits*. 2nd Ed. Maidenhead: Amacom.

### Websites

www.cca-global.com	Customer Care Association Global Research and publications (General reference)
www.mckinsey.com	McKinsey & Company The expanding role of design in creating an end-to-end customer experience (Article)
www.mindtools.com	Mind Tools Customer Experience Mapping (General reference)
www.visual-paradigm.com	Visual Paradigm What is Customer Experience Mapping? (General reference and templates)

### Links

This unit links to the following related units:

*Unit 2: Marketing Processes and Planning*

*Unit 14: Digital Business in Practice*

*Unit 44: Business Information Technology Systems*

## Unit 18: Work Experience

<b>Unit code</b>	<b>M/618/5059</b>
<b>Unit level</b>	<b>4</b>
<b>Credit value</b>	<b>15</b>

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### Introduction

A crucial part of a professional's skills, abilities and competences are developed through work and they are refined through practical experiences and 'learning by doing'. Employers rate work experience above all else and HN qualifications aim to make students work ready by preparing them with the appropriate balanced skills profile that employers require.

Integral to achieving 'work readiness' is the need for practical application and contextualisation of learning; a perspective that is increasingly sought after by employers. Curriculum that helps students gain real-world, relevant experience in their chosen careers has proven to be an enabler for graduate progression to employment and of considerable value to students' personal and professional development.

This unit aims to enable students to develop personal and professional skills by engaging them in practical tasks and activities in a relevant workplace. The unit is designed to facilitate supervised learning in a workplace that can fit around full-time or part-time student commitments, it enables an employer and an academic supervisor to monitor and support students through a goal-orientated process. The minimum work experience hours required for completion is 80 hours.

Students will be given the opportunity to identify and plan their own skills development in line with a chosen career path or direction. It is expected that students negotiate and agree work experience in an appropriate work context, agreed by the employer and academic supervisor. To allow students to evaluate the process and any shortcomings in their development going forward, they will monitor and record evidence from the tasks and activities they undertake.

## **Learning Outcomes**

By the end of this unit students will be able to:

- LO1 Investigate the value and benefits of practical work experience for career and personal development
- LO2 Plan suitable and relevant work experience in an appropriate sector organisation
- LO3 Undertake appropriate work experience to develop professional skills and competences
- LO4 Evaluate personal skills and competences developed during practical work experiences.

## Essential Content

### LO1 Investigate the value and benefits of practical work experience for career and personal development

*Organisational contexts for career development:*

Different service sector sub-sectors and organisational contexts.

The key roles and responsibilities found in different service sub-sectors.

*Learning and development in work environments:*

Academic knowledge vs practical knowledge and skills.

Learning theories, including Bloom's Taxonomy, Gardner's Theory of Multiple Intelligences and Bandura's Social Learning Theory.

Concept of application of theory to practice.

The benefits of practical learning.

Career progression and employer expectations of key employability skills, e.g. interpersonal skills, communication skills, critical thinking, presentation skills, leadership skills, teamwork.

The importance and value of soft skills to the hospitality industry, soft skills vs hard skills.

### LO2 Plan suitable and relevant work experience in an appropriate sector organisation

*Setting development plans, goals and objectives:*

'SMART' planning, writing of goals and objectives.

Self-assessment of skills and competences.

Learning and development approaches:

Visual, Auditory, Kinesthetic (VAK) learning styles, Honey & Mumford learning cycle, KOLB's learning cycle.

Different learning approaches, e.g. shadowing, in-house courses and on-job training, online learning, formal training, buddying, secondment, coaching and mentoring, job rotation, workshops, conferences.



*Preparation tools and techniques for career development:*

Looking at job applications, CV and interview preparation.

Interview and presentation skills.

The importance of understanding the appropriate uniform and dress code for the job role in relation to the interview process.

Service sub-sector specific equipment and requirements.

### **LO3 Undertake appropriate work experience to develop professional skills and competences**

*Carry out planned tasks and activities:*

Engagement in tasks such as projects, routine duties, operational issues, formal training, legal compliance, process development.

People management and leadership.

Application of problem solving, contingency planning, coordinating tasks, teamwork.

Professional conduct and behaviours to display while working, presenting a brand identity, the importance of uniformity in presentation.

### **LO4 Evaluate personal skills and competences developed during practical work experiences.**

*Recording of actions and activities in suitable formats:*

Methodical record of experiences gained during work, linked to skills to be developed.

Recorded in appropriate methods such as journal, logbook, diary, portfolios, online records.

Creation of evidence in appropriate formats.

*Reviewing and evaluating progress:*

Reflection of career development and learning in the work environment in areas such as: systems, interpersonal skills, problem resolution, incidents and accidents, teamwork and management practices.

Recommendations on how to enhance future development plans, e.g. different work context, alternative roles and titles, locations, preparation methods, time management.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>L01</b> Investigate the value and benefits of practical work experience for career and personal development		<b>D1</b> Critically evaluate the benefits of practical action learning to underpin theory and approaches in the work environment.
<b>P1</b> Explore and discuss different learning theories that could be used to inform a suitable work experience. <b>P2</b> Examine the benefits of practical work experience for professional skills and career development.	<b>M1</b> Evaluate a range of different learning theories in practice, to highlight and emphasise the benefits of action learning for career development.	
<b>L02</b> Plan suitable and relevant work experience in an appropriate service sector organisation		<b>D2</b> Analyse and interpret actions, activities and approaches, adopted in a structured development plan, to gain appropriate work experience in a service sector organisation.
<b>P3</b> Construct a development plan for skills and career advancement in a chosen service sector context. <b>P4</b> Explain a range of tools and techniques that can be used to acquire appropriate work experience in a service sector organisation.	<b>M2</b> Devise an in-depth development plan that provides a detailed outline of the approaches, tools and techniques applied to gain appropriate work experience in a service sector organisation.	
<b>L03</b> Undertake appropriate work experience to develop professional skills and competences		<b>D3</b> Critically reflect on development processes within the workplace to establish strengths and weaknesses of the different approaches adopted.
<b>P5</b> Conduct appropriate work experience to develop specific skills for career development whilst producing on-going evidence of work performance.	<b>M3</b> Examine the development processes within a work context to maximise growth opportunities within the work experience.	

Pass	Merit	Distinction
<b>LO4</b> Evaluate personal skills and competences developed during practical work experiences.		<b>D4</b> Justify the evaluation and recommendations of different approaches to enhancing development in practice.
<b>P6</b> Evaluate skills, performance and career development to identify areas for future advancement.  <b>P7</b> Recommend methods and techniques to enhance development processes in the given service sector work environment.	<b>M4</b> Produce an evidence-based evaluation of work experiences, making actionable and tangible recommendations for enhanced development processes.	

## Recommended Resources

### Textbooks

DONE, J. and MULVEY, R. (2016) *Brilliant Graduate Career Handbook*. Essex: Prentice Hall.

GRANT, K. and HOOLEY, T. (2017) *Graduate Career Handbook: Life after graduation, maximise your employability, get a graduate*. Trotman.

ROOK, S. (2016) *Work Experience, Placements & Internships*. London: Palgrave Macmillan.

ROOK, S. (2019) *The Graduate Career Guidebook*. London: Macmillan.

### Websites

<a href="http://www.cipd.co.uk">www.cipd.co.uk</a>	Chartered Institute of Personnel and Development (General reference)
<a href="http://www.mindtools.com">www.mindtools.com</a>	Mind Tools Career Support Resources (General reference)
<a href="http://www.nationalcareers.service.go.uk">www.nationalcareers.service.go.uk</a>	National Careers Service CVs, Skills Health Check (General reference)

### Links

This unit links to the following related unit:

*Unit 17: Professional Identity and Practice*

## Unit 19: Research Project (Pearson Set)

Unit code	H/618/5060
Unit type	Core
Unit level	5
Credit value	30

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### Introduction

Research skills are as vital for the workplace as they are for academic development. Research skills enable students to identify a problem, collect informational resources that can help address the problem, evaluate the resources for quality and relevance, and come up with an effective solution to the problem. These are seen as essential skills by employers for most positions in industry, to support a range of duties, for example report writing, building a business case, business planning, launching a new product or service.

***This is a Pearson-set unit.*** Students will choose their own project based on a theme provided by Pearson (this will change annually). The project must be related to their specialist pathway of study (unless they are studying the general business pathway). This will enable students to explore and examine a relevant and current topical aspect of business in the context of the business environment and their chosen specialist pathway.

The aim of this unit is to offer students the opportunity to engage in sustained research in a specific field of study. The unit enables students to demonstrate the capacity and ability to identify a research theme, to develop a research aim and objectives and to present the outcomes of such research in both written and verbal formats. The unit also encourages students to reflect on their engagement in the research process, during which recommendations for future, personal development are key learning points.

**\*Please refer to the accompanying *Pearson-set Assignment Guide and Theme Release* document for further support and guidance on the delivery of the Pearson-set unit.**

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Examine appropriate research methodologies and methods to identify those appropriate to the research process
- LO2 Develop a research proposal, including a supporting literature review
- LO3 Analyse data using appropriate techniques to communicate research findings
- LO4 Reflect on the application of research methodologies and process.

## Essential Content

### LO1 **Examine appropriate research methodologies and methods to identify those appropriate to the research process**

#### *The research process:*

The distinct phases of research, including research aims and objectives, methodology, literature review, methods, analysis and presentation of findings.

The use of secondary data to inform primary data collection.

Explorative, descriptive and causal research approaches.

#### *Research methodologies and methods:*

Different research methodologies underpinning a philosophical approach: positivism (deductive) vs interpretivism (inductive) paradigms.

Conceptual framework of ideas, philosophies, approaches and concepts to conduct research.

Qualitative and quantitative research methods.

Mixed method approaches, including limitations and advantages.

Associated tools and techniques, e.g. focus groups, in-depth surveys, questionnaires.

#### *Ethics, reliability and validity:*

Role and significance of ethics in conducting research, e.g. informed consent, confidentiality.

Reliability of research and degree to which research methods produce consistent results.

Validity of research to extend to which results measure what they are supposed to measure.

## LO2 **Develop a research proposal, including a supporting literature review**

### *Developing a research proposal:*

Developing a methodical and valid proposal as the foundation for a research project.

Purpose and significance of the research question/hypothesis.

Clarity on the research aim and supporting objectives, and how these may change as the research process unfolds.

Application of research methods and ethical considerations that need to be addressed in conducting the research.

### *Literature review:*

The purpose of the literature review, e.g. to explore, summarise, compare and critically analyse what other researchers have written about the research topic.

Adopting a 'funnel' approach, balancing focus and depth.

Positioning a research project in context of existing knowledge. Identification of relevant schools of thought and/or seminal research works.

Potential to open up new gaps in knowledge or levels of awareness.

## LO3 **Analyse data using appropriate techniques to communicate research findings**

### *Primary data collection and sampling:*

The significance of gathering primary data, qualitative or quantitative, to support research analysis.

Characteristics of primary data.

Selecting sample types and sizes relevant to the research.

Alternative random and non-random probability sampling approaches.

Different digital tools for data gathering, e.g. SurveyMonkey, Google Forms, SurveyGizmo.

### *Analysing data:*

Quantitative data: validation, editing, coding and analysis.

Qualitative data: data preparation and analysis of content, narrative and discourse approaches.



*Communicating research outcomes:*

Alternative methods of communicating outcomes persuasively and logically.

Recognising methods, e.g. spoken word and medium, e.g. presentation.

The influences of research and intended audience.

Use of frequency tables, simple tables, pie charts, histograms, frequency curves and normal curve.

Advantages and disadvantages of different methods.

Software for analysing and presentation of quantitative data, e.g. Excel, SPSS.

#### **LO4 Reflect on the application of research methodologies and process.**

*Reflection for learning and practice:*

Difference between reflecting on performance and evaluating a research project including the research process, the quality of the research argument and use of evidence.

Reflection on the merits, limitations and potential pitfalls of chosen methods.

*The cycle of reflection:*

Critical and objective self-reflection to inform personal development along the research journey.

Reflection in action and reflection on action.

Using self-reflection to inform and develop future behaviours, considerations and actions.

## Learning Outcomes and Assessment Criteria

Pass		Merit	Distinction
<b>LO1</b> Examine appropriate research methodologies and methods to identify those appropriate to the research process			<b>LO1 and LO2</b>  <b>D1</b> Justify chosen research methodologies and processes supported by a credible academically underpinned literature review.
<b>P1</b> Examine alternative research methodologies.		<b>M1</b> Evaluate alternative research methodologies and data collection methods and justify choices made based on philosophical/theoretical frameworks.	
<b>P2</b> Explore alternative methods and tools used for the collection of research data that consider costs, ethics and access.			
<b>LO2</b> Develop a research proposal, including a supporting literature review			
<b>P3</b> Produce a research proposal, including a defined aim and objectives supported by a literature review.		<b>M2</b> Evaluate the merits, limitations and pitfalls of approaches to data collection in compiling the research proposal.	<b>D2</b> Communicate to the intended audience the research findings and outcomes, including justified recommendations.
<b>LO3</b> Analyse data using appropriate techniques to communicate research findings			
<b>P4</b> Conduct research using appropriate methods for a business research project.		<b>M3</b> Present the analysis of data utilising appropriate analytical techniques, charts and tables to meet the research aim and communicate outcomes.	
<b>P5</b> Analyse data from research findings to communicate research outcomes in an appropriate manner for the intended audience.			
<b>LO4</b> Reflect on the application of research methodologies and process.			<b>D3</b> Demonstrate critical self-reflection and insight that results in recommended actions for improvements to inform future research.
<b>P6</b> Reflect on the effectiveness of research methods applied in meeting objectives of the business research project.		<b>M4</b> Demonstrate self-reflection and engagement in the research project process, leading to recommended actions for future improvement.	
<b>P7</b> Consider alternative research methodologies and lessons learnt in view of outcomes.			

## Recommended Resources

### Textbooks

FLICK, U. (2020) *Introducing Research Methodology: A Beginner's Guide to Doing a Research Project*. 3rd Ed. London: SAGE.

GRAY, D. (2017) *Doing Research in the Real World*. 4th Ed. London: SAGE.

SAUNDERS, M., LEWIS, P. and THORNHILL, A. (2019) *Research Methods for Business Students*. 6th Ed. Harlow: Pearson.

### Websites

www.learnhigher.ac.uk	Learn Higher
	Research Skills (Teaching resources)
www.skillsyouneed.com	Skills You Need
	Learning Skills
	How to Write a Dissertation or Thesis (General reference)

### Links

This unit links to the following related unit:

*Unit 6: Managing a Successful Business Project (Pearson Set)*

## Unit 31: Period Hair and Makeup

<b>Unit code</b>	<b>F/617/1781</b>
<b>Unit level</b>	<b>4</b>
<b>Credit value</b>	<b>15</b>

### Introduction

Working as a makeup artist or hair stylist requires a diverse range of skills to meet a wide area of settings. Duties and responsibilities depend on the sector or industry and artists will be required to use a portfolio of skills to suit the brief. Hair and/or makeup artists are frequently called upon to recreate historical hair and/or makeup to develop and produce period and iconic styles. There are a variety of historical fashions and trends to realistically recreate with the use of modern technology and tools to assist.

This unit is designed to enable students to work on a project for any medium and develop the required skills specific to work within defined historical periods. Students will be required to explore the expertise and knowledge required for a makeup/hair artist to work professionally within defined periods of history.

Students will be able to demonstrate how to recreate period designs and apply them with modern technology and tools. Through this unit students will develop the skills and concepts to work in professional settings to follow the professional standards and health and safety and produce Period Hair and/or Makeup portfolio to meet industry requirements.

## **Learning Outcomes**

By the end of this unit students will be able to:

1. Explore the historical development of hair and/or makeup styling and techniques
2. Demonstrate hair and/or makeup techniques for a specified period of time, as defined through an industry standard set brief
3. Undertake a role in a period makeup and/or hair project, as defined by an industry standard set brief
4. Analyse the strengths of the period hair and/or makeup project in meeting the requirements of the brief and areas for future development.

## Essential Content

### LO1 Explore the historical development of hair and/or makeup styling and techniques

*History of Makeup styles and techniques:*

Roman empire

Medieval period

17th Century

18th Century

19th Century

20th Century

21st Century to today

Cultural changes

Political and Economical factors

Environmental

Trends

Social factors

Equipment

Tools

Products

*History of Hair styles and techniques:*

Roman empire

Medieval period

17th Century

18th Century

19th Century

20th Century

21st Century to today

Cultural changes

Political and economical factors

Environmental  
Trends  
Social factors  
Equipment  
Tools  
Products

**LO2 Demonstrate hair and/or makeup techniques for a specified period of time, as defined through an industry standard set brief**

*Preparation:*

Working to a brief  
Planning process  
Creating designs  
Drawings  
References  
Charts  
Working in a team  
Timescales  
Originality  
Exploring ideas.

*Health and safety and professional standards:*

Regulations policies and procedures that must be adhered to  
Relevant to workplace environment and resources used.

*Period Hair image:*

Industry standard tools  
Equipment and products  
Hair preparation  
Dressing  
Styling and finishing techniques  
Preparation and application of hair pieces.

*Period Makeup image:*

Industry standard tools

Equipment and products

Skin preparation (body and face) skin aftercare

Techniques for a wide and diverse range of environments.

*Portfolio building:*

Types of portfolio – digital or print

Drawings and sketches

Reference documentation

Photographic images

Research materials

Portfolio requirements for employers.

**LO3 Undertake a role in a period makeup and/or hair project, as defined by an industry standard set brief**

*Working to a brief:*

Deadlines

Time management

Interpreting briefs.

*Event type:*

Theatre Production

Film Set

Television Studio

Photo shoot

locations

lighting

health and safety policies and procedures.



*Resources:*

Professional Hair and/or Make up kit

Model selection

Preparation

Charts

Designs

Reference materials

Period costumes.

*Team Work:*

Communication skills

Working under pressure

Working within time restrictions

Working within a creative team

Confidence and assurity

Time management.

*Portfolios:*

Types of portfolio – digital and physical

Content

Presentation

Employer expectation.

**LO4 Analyse the strengths of the period hair and/or makeup project in meeting the requirements of the brief and areas for future development**

*Working to a brief:*

Meeting outcomes and expectations

Meeting deadlines

Time management.

*Planning process:*

Effectiveness of planning

Research

Design process

Originality.

*Technical Skills:*

Effectiveness and appropriateness of range of techniques, styles, tools and kit used.

*Personal skills:*

Communication skills

Team working skills

Time management

Confidence

Organisation

Independent skills.

*Feedback:*

Self-reflection

Tutor

Peer

Audience

Industry specialists where possible.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>L01</b> Explore the historical development of hair and/or makeup styling and techniques		<b>D1</b> Analyse the impact political, economic and social changes have had on historical styling and techniques within the hair and makeup genre
<b>P1</b> Explore the historical development of hair and/or make up styling and techniques  <b>P2</b> Investigate the political, social and economic factors have had on hair and/or makeup styling on a range of defined eras	<b>M1</b>  Explain the influence politics, social and economic change with regard to fashions in hair and makeup styling through a range of eras	
<b>L02</b> Demonstrate hair and/or makeup techniques for a specified period of time, as defined through an industry standard set brief		<b>D2</b> Demonstrate how a wide and diverse range of makeup and/or hair styling and techniques can be used to portray historical characters
<b>P3</b> Explore hair and/or makeup techniques for a range of historical periods  <b>P4</b> Demonstrate hair and/or makeup techniques, for a range of time periods, working to an industry standard brief	<b>M2</b> Demonstrate how a diverse range of hair and/or makeup techniques can be used to create a historical portrayal	
<b>L03</b> Undertake a role in a period makeup and/or hair project, as defined by an industry standard set brief		<b>D3</b> Demonstrate versatility, adaptability and effective technical and communication skills throughout the defined project as a makeup artist and/or hair stylist
<b>P5</b> Develop designs to meet the requirements for a set brief  <b>P6</b> Carry out a makeup and/or hair role for a project as defined by a set brief with confidence and assurity  <b>P7</b> Demonstrate the planning, research and design process through the production of a portfolio as defined by the set brief	<b>M3</b> Demonstrate creative historical makeup and/or hair styles and techniques through design development and application whilst meeting the set brief requirements	

Pass	Merit	Distinction
<b>LO4</b> Analyse the strengths of the period hair and/or makeup project in meeting the requirements of the brief and areas for future development		<b>D4</b> Critically analyse the skills acquired and required for historical hair and/or makeup to ensure industry recognition and employment
<p><b>P9</b> Review your portfolio against the given brief linking it to historical context and professional industry standards</p> <p><b>P10</b> Evaluate areas for further development and the importance of personal and technical skills, communication and team work</p>	<b>M4</b> Analyse own areas for skills development for future employment working as a makeup and/or hair artist in period/historical work	

## Recommended resources

### Textbooks

ACADEMY OF FREELANCE MAKEUP (2013) *Makeup is Art: Professional Techniques for Creating Original Looks*. London: Carlton Books Ltd

BELL, F. and KRISTENSEN, S. (2016) *Making It As A Makeup Artist: A Guide to Becoming a Working Freelance Makeup Artist*. United Kingdom: Independently published.

BIDDLE-PERRY, G. and CHEANG, S. (2008) *Hair: Styling Culture and Fashion*. Oxford: BERG.

CORSON, R. (2010) *Fashions in Makeup: From Ancient to Modern Times*. Revised edn. London: Peter Owen Ltd.

CORSON, R. (2005) *Fashions in Hair: The First Five Thousand Years*. London: Peter Owen Ltd.

CROLL, J. (2014) *Fashion That Changed the World*. 1st edn. Munich: Prestel.

DAVIS, G. and HALL, M. (2017) *The Makeup Artist Handbook: Techniques for Film, Television, Photography, and Theatre*. 3rd edn. London: Routledge.

DELAMAR, P. (2015) *The Complete Make Up Artist: Working in Film, Fashion, Television and Theatre*. 3rd edn. Boston, Massachusetts: Cengage Learning EMEA.

ELDRIDGE, L. (2015) *Face Paint: The Story of Makeup*. New York: Abrams Image.

FIELD, C. (2013) *Hairstyles: Ancient to Present*. London: Goodman Books.

LOWE, S. (2016) *Hair (Object Lessons)*. London: Bloomsbury Academic.

PHILIPPON, L. (2013) *Hair: Fashion and Fantasy*. London: Thames and Hudson Ltd.

### Websites

<a href="http://comestepbackintime.wordpress.com">comestepbackintime.wordpress.com</a>	Come Step Back in Time Historical Hair and Make-up (Article)
<a href="http://www.statece.com/blog">www.statece.com/blog</a>	StateCE Blog How Cosmetology Has Changed Over the Years (Article)
<a href="http://www.vam.ac.uk">www.vam.ac.uk</a>	Victoria and Albert Museum Hairstyles and cosmetics reading list (Reading list)

## Unit 20: Organisational Behaviour

**Unit code** A/618/5064

**Unit type** Core

**Unit level** 5

**Credit value** 15

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### Introduction

Organisational behaviour is concerned with understanding, explaining and predicting the behaviour of individuals in the workplace and can assist in the development of practical solutions to organisational and managerial problems. Individuals, whether acting in isolation or collectively as part of a group, engage in actions and behaviours that can have a positive or negative impact on company performance and the achievement of strategic goals. It is therefore essential that those who are involved in managing and leading people in organisations, acquire insight and expertise in organisational behaviour.

The aim of this unit is to develop knowledge and understanding of how organisational behaviour concepts, theories and techniques can be applied in work and management settings in order to enhance individual, team and organisational performance. Students will be able to apply this knowledge in a variety of business situations. They will appreciate how effective application of organisational behaviour principles can be used to explain why people behave and act in particular ways and to predict how employees will respond to certain demands. The unit also develops student understanding of the influence of culture, the operation of power and politics in organisations and how these variables influence the actions and behaviour of people in an organisational context.

On successful completion of this unit, students will have developed a range of transferable skills and knowledge. This includes core people management skills used to achieve positive organisational outcomes and to create value by recognising individual difference, team working and the creation of inclusive organisational cultures.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Reflect on own personality and perceptions to understand how individual difference informs and influences management approaches
- LO2 Apply content and process theories of motivation to create and maintain an effective workforce
- LO3 Participate in a group team activity for a given business situation to demonstrate effective team skills
- LO4 Examine how power, politics and culture can be used to influence employee behaviour and accomplish organisational goals.

## Essential Content

### LO1 **Reflect on own personality and perceptions to understand how individual difference informs and influences management approaches**

*Individual difference: personality.*

Approaches to the study of human personality. Nomothetic and idiographic perspectives and implications.

Debates around measuring and testing human personality.

The 'big five' dimensions of human personality: extroversion, agreeableness, conscientiousness, emotional stability and openness to experience.

Debates around individual personality differences and abilities. The extent that personality dimensions link to job roles and performance, job attitudes, leadership and teamworking abilities.

Application of personality and other forms of psychometric assessments in selection and promotion decisions, team-building and professional development programmes.

Emotional intelligence as a related concept of human personality.

*Individual difference: perception:*

Significance of perception for developing effective personal and work relationships.

Factors that influence an individual's perceptual set, e.g. personality, past experiences, expectations, learning. Relationship between perception and behaviour.

Perceptual errors and distortions, including stereotyping, unconscious bias and how cultural differences can be misconstrued.

The relationship between perception and communication.

Verbal and non-verbal communication, selecting information and making judgements.

Attribution theory and interpersonal perception.



## LO2 **Apply content and process theories of motivation to create and maintain an effective workforce**

### *Motivational theories:*

Main features of key models and their underpinning assumptions of content and process theories of motivation.

Content theories, including Alderfer, Herzberg, Maslow, McClelland.

Process theories, including Adams, Latham and Locke, Porter and Lawler.

The implications of motivational theory for management and leadership practice in organisations.

Differences between intrinsic and extrinsic motivation.

The relationship between motivation, job satisfaction and employee commitment and engagement.

Modifying employee on-the-job behaviour through reinforcement initiatives.

### *Application of motivation theories:*

Characteristics and behaviours of employees who demonstrate low- and high motivation.

Implications of motivation theories for the design of work.

The job characteristics model of Hackman and Oldham.

Implications of motivation theories for the design of reward and benefit packages.

The concept of empowerment and empowering people to meet higher-level needs.

Human motivation as a complex, dynamic and culture-bound concept, affected by a range of personal, generational and environmental factors.

### **LO3 Participate in a group team activity for a given business situation to demonstrate effective team skills**

#### *Different types of organisational teams:*

The importance of work groups and effective teamworking in contemporary organisations.

Types of teams, e.g. functional and cross-functional, problem-solving, project and self-directed teams.

The impact of globalisation and digital technologies on organisational teams to include virtual and cross-cultural teams. Diversity and issues of communication, leadership and insufficient support.

Digital tools for communication, e.g. Slack, Skype, Microsoft Teams, for project management, e.g. Trello and Smartsheet.

Cloud-based technologies for file sharing, collaboration and storing information.

#### *Team dynamics and teamwork:*

Differences between groups and teams.

Team development models: the stages of team development and the implications for task achievement and team-member relationships. development.

Belbin's role typology for creating effective teams and consideration of skills required for resolving team conflict and creating effective teams.

The concept of cohesiveness and the role and importance of norms.

Issues with cohesive teams, e.g. groupthink, suspicion and aggression towards outsiders, resistant to change.

Challenges in facilitating cohesiveness in global, virtual and diverse teams.

**LO4 Examine how power, politics and culture can be used to influence employee behaviour and accomplish organisational goals.**

*Influence of power:*

Power as a property viewpoint: individual, relationships and embedded in structures. Hard and soft sources of power.

Bases and types of power, power controls and power sources. The use of power as an influencing mechanism in different circumstances and situations, to achieve organisational goals and influence employee behaviour and performance.

*Influence of politics:*

Organisational politics arising from structural divisions, differing priorities and interests and when policies and rules are interpreted or acted on differently.

Political activity during periods of organisational change, political behaviour associated with conflict and resistance.

*Influence of culture:*

Culture as key variable affecting organisational success and factors that influence it, e.g. nature of business, company goals, employee behaviours, diversity.

Culture promoting organisational values and expectations of how work should be undertaken and behavioural expectations of employees.

How culture manifests itself at different levels (Schein).

Types of organisational culture and factors to consider when seeking to develop high-performance organisational cultures.

Cross-cultural differences and the need for awareness of cultural difference when developing organisational strategy and policy.

Hofstede's Cultural Dimensions Theory and application.

The influence of globalisation and digital technologies on organisational culture in the 21st century, including the opportunities and challenges of remote working practices.

Principles of Network Theory and Systems Theory as frameworks to understand organisations.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>LO1</b> Reflect on own personality and perceptions to understand how individual difference informs and influences management approaches		<b>LO1 and LO2</b>  <b>D1</b> Adapt personal perspectives, traits and attributes to justify improvements that influence and enhance employee motivation and create an effective workforce.
<b>P1</b> Assess own personality traits and attributes in terms of them having a positive or negative effect on management approaches and company performance.  <b>P2</b> Reflect on the value and importance of personality and perception for effective managerial relationships.	<b>M1</b> Challenge own perspectives and individual traits and attributes to influence and improve managerial relationships.	
<b>LO2</b> Apply content and process theories of motivation to create and maintain an effective workforce		
<b>P3</b> Apply content and process theories of motivation for enhancing and maintaining an effective organisational workforce, providing specific examples.	<b>M2</b> Critically assess the extent that employee motivation can be enhanced and maintained by practical application of content and process theories of motivation.	
<b>LO3</b> Participate in a group/team activity for a given business situation to demonstrate effective team skills		<b>D2</b> Revise personal contribution and skills for effective teams to make justified recommendations for own improvement.
<b>P4</b> Contribute to the creation and management of effective teamworking in a given business situation.  <b>P5</b> Explore the relevance of group behaviour and team theory in the creation and management of effective teamworking.	<b>M3</b> Reflect on personal contribution to group behaviour and dynamics in the creation and management of effective teamworking.	

Pass	Merit	Distinction
<b>LO4</b> Examine how power, politics and culture can be used to influence employee behaviour and accomplish organisational goals.		<b>D3</b> Make justified recommendations on how power, politics and culture can be used effectively to influence and direct employee behaviour towards the accomplishment of organisational goals.
<b>P6</b> Examine how the operation of power, politics and culture in an organisation affect employee behaviour and the accomplishment of organisational goals.	<b>M4</b> Evaluate how the operation of power, politics and culture affect employee behaviour and the accomplishment of organisational goals.	

## Recommended Resources

### Textbooks

BROOKS, I. (2018) *Organisational Behaviour: Individuals, Groups and Organisation*. 5th Ed. Harlow: Pearson.

BUCHANAN, D. and HUCZYNSKI, A. (2019) *Organizational Behaviour*. 10th Ed. Harlow: Pearson.

MULLINS, L. J. (2019) *Organisational Behaviour in the Workplace*. 12th Ed. Harlow: Pearson.

WILSON, F. M. (2018) *Organizational Behaviour and Work: A Critical Introduction*. 5th Ed. Oxford: Oxford University Press.

### Websites

www.businessballs.com	Business Balls Organisational Culture (Articles)
www.hrzone.com	HR Zone Lead – Culture (Articles)
www.managementstudyguide.com	Management Study Guide Library – Organisational Behaviour (General Reference)
www.managementtoday.co.uk	Management Today Leadership Lessons (Articles)

### Links

This unit links to the following related units:

*Unit 4: Leadership and Management*

*Unit 24: Understanding and Leading Change*

*Unit 25: Global Business Environment*

*Unit 46: Developing Individuals, Teams and Organisations*

# Unit 24: Understanding and Leading Change

**Unit code** K/618/5075

**Unit level** 5

**Credit value** 15

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## Introduction

‘Change is the only constant in life’ (Heraclitus, 500BCE). Whatever industry, whatever position you are employed in, there is always change. As such, businesses need to adapt and change with the changing business environment. Organisations are seeing change at a more rapid speed than ever before. Technology is playing a big part in this increased pace of change. Change leaders are evident in all business sectors and in a variety of roles within an organisation.

In business, change is all around in all areas of an organisation, from minor process changes to large-scale structural change. The aim of this unit is for students to understand the different types and scope of change that may occur in an organisation. The unit will aim to illustrate the drivers/triggers for change and how they vary and affect organisations in different ways, including the degree of impact and management’s response to change. Students will gain an appreciation of how the depth of change can influence organisational behaviour both during and after the change.

On successful completion of this unit, students will be able to apply a range of change management concepts, including diagnosing driving/resisting forces, planning for change and dealing with change in organisational settings. This will put students in a strong position to contribute to change initiatives in the workplace.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Produce a comparative analysis of the different types and drivers of change in business
- LO2 Evaluate the impact of change on organisational behaviour
- LO3 Investigate how forces driving and resisting change influence leadership decision making
- LO4 Recommend a range of leadership approaches to change initiatives.



## Essential Content

### LO1 **Produce a comparative analysis of the different types and drivers of change in business**

#### *Types of organisational change:*

Change in a business context, including large scale, e.g. radical, discontinuous, revolutionary and small scale, e.g. incremental, evolutionary.

Different types of change that include planned or emergent, initiated or imposed.

Types of internal organisational change: structural, strategic, people and process change.

Individual, group and organisational levels of change

#### *Drivers of change:*

Internal and external drivers of change, e.g. PESTLE, core competences. To include identification and selection of the most significant drivers in each context.

The impact of technologies, including mobile devices, cloud computing, Artificial Intelligence (AI), cognitive computing, data analytics on the speed of change and as a driver of change.

The digital transformation of organisations and the change business model.

### LO2 **Evaluate the impact of change on organisational behaviour**

#### *Change and the impact on organisational behaviour:*

The impacts of change at individual, group and organisational level.

The psychological impact of change on people and the implications of change.

Impact on team dynamics and how people are led and managed.

The influence of position and perception on differing views of change, negatively or positively.

#### *Readiness to change:*

Learning organisations.

The use of systems theory, systems leadership and continuous improvement models to predict and proactively plan for change.

*Measures to minimise impact change:*

Different perspectives to dealing with change.

Change impact analysis, e.g. Bohnert and Arnold, and impact analysis techniques

The importance of stakeholder analysis and communication in change.

Application of the Burke-Litwin model to make the change process efficient and effective.

### **LO3 Investigate how forces driving and resisting change influence leadership decision making**

*Barriers and resistance to change:*

Different levels of resistance, e.g. individual, group and organisational levels.

Schein's organisational culture model, self-efficacy perceptions and situational resistance when determining barriers.

The use of force field analysis to understand likely opposition and support for change.

*Leadership and decision making:*

Leadership ethics for effective decision making, e.g. respecting and valuing diversity, values and ethical beliefs.

Speed of change, e.g. pre-emptive and proactive or responsive and reactive.

The impact that the scope of the change may have on decision making.

Responding to barriers and resistance to change.

### **LO4 Recommend a range of change leadership approaches to change initiatives.**

*Leadership approaches:*

The context of a task, activity or challenge to determine leadership styles and management approaches, e.g. situational leadership, transformational leadership and psychodynamic approaches.

'Nudge' theory and influencing behaviours.

### *Initiating change:*

The impacts of change initiated by leaders, e.g. increased control, time and increased opportunity to select the best approach to apply.

The impacts of change that is imposed, e.g. opportunities are reduced or even negated.

The use of change agents in initiating and aiding change.

### *Change models:*

The benefits and disadvantages of the key models of change, including:

- Kotter's 8-Step Change Model
- Lewin's change management model
- McKinsey's 7 S model.

Kotter's Dual Operating system, which addresses both entrepreneurial ideas and strategy.

Change Kaleidoscope and the application of power politics and culture to change.

Change through strategic communication, the principles of change leadership.

The use of the ADKAR model (Awareness, Desire, Knowledge, Ability and Reinforcement) to identify why change is difficult and why changes succeed or fail.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>LO1</b> Produce a comparative analysis of the different types and drivers of change in business		<b>LO1 and LO2</b> <b>D1</b> Make justified recommendations that would minimise impact of organisational change on organisational behaviour.
<b>P1</b> Review a range of contemporary examples of organisational change and their impact on business operations. <b>P2</b> Compare drivers for change and their influence on organisational change.	<b>M1</b> Analyse drivers for change and the types of organisational change they have affected.	
<b>LO2</b> Evaluate the impact of change on organisational behaviour		
<b>P3</b> Analyse how leadership and individual behaviour in organisations can be affected by change. <b>P4</b> Evaluate measures that can be taken to minimise negative impacts of change on organisational behaviour.	<b>M2</b> Critically evaluate the long-term implications of change on organisational behaviour.	
<b>LO3</b> Investigate how forces driving and resisting change influence leadership decision making		<b>LO3 and LO4</b> <b>D2</b> Critically analyse different leadership approaches and models in relation to the drivers and resisting forces.
<b>P5</b> Investigate the forces for and against change and how they affect leadership decision making in organisations.	<b>M3</b> Apply force field analysis to analyse both driving and resisting forces to show how they influence decision making in organisations.	
<b>LO4</b> Recommend a range of change leadership approaches to change initiatives.		
<b>P6</b> Recommend change leadership approaches and models to change initiatives for given situations.	<b>M4</b> Analyse the use of leadership approaches and models for given situations.	

## Recommended Resources

### Textbooks

- CAMERON, E. and GREEN, M. (2019) *Making Sense of Change Management*. 5th Ed. London: Kogan Page.
- DAWSON, P. and ANDRIOPOULOS, C. (2017) *Managing Change, Creativity and Innovation*. 3rd Ed. London: Sage.
- HODGES, J. and GILL, R. (2015) *Sustaining Change in Organizations*. London: Sage.
- LEWIS, L. K. (2019) *Organizational Change: Creating Change Through Strategic Communication*. Chichester: Wiley-Blackwell.
- MEE-YAN, C-J. and HOLBECHE, L. (2015) *Organization Development: a Practitioner's Guide for OD and HR*. London: Kogan Page.
- NORTHHOUSE, P. G. (2018) *Leadership Theory and Practice*. 8th Ed. London: SAGE.
- PENDLETON, D. and FURNHAM, A. (2016) *Leadership: All You Need to Know*. London: Palgrave Macmillan.
- STANFORD, N. (2018) *Organization Design: Engaging with Change*. 3rd Ed. London: Routledge.

### Websites

<a href="http://www.businessstrainingworks.com">www.businessstrainingworks.com</a>	Business Training Works Resources (General reference)
<a href="http://www.managementtoday.com">www.managementtoday.com</a>	Management Today Leadership News and industry articles (General reference)
<a href="http://www.mindtools.com">www.mindtools.com</a>	Mind Tools Leadership Change Management (General reference)
<a href="http://www.strategy+business.com">www.strategy+business.com</a>	Strategy and Business Leadership (Articles)

## **Links**

This unit links to the following related units:

*Unit 4: Leadership and Management*

*Unit 20: Organisational Behaviour*

*Unit 46: Developing Individuals, Teams and Organisations*

*Unit 47: Human Resources – Value and Contribution to Organisational Success*

# Unit 25: Global Business Environment

**Unit code** M/618/5076

**Unit level** 5

**Credit value** 15

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## Introduction

As globalisation of business continues the world is becoming smaller, this means developing complex opportunities and risks for business operations as organisations expand and transform in this dynamic environment. Understanding business from a global perspective is about being open to new ideas, issues and solutions, and opening business up to new opportunities and growth.

The aim of this unit is to explore the wider position that some organisations have in the global environment. Students will gain an appreciation of the complexities of operating in a global environment, enabling them insight in to an organisation's current or aspirational global presence.

On successful completion of this unit, students will understand the wider global environment in which organisations operate. This enables students to add value to an organisation as they will be able to apply their knowledge in such a way that they could advise senior managers (in large and small organisations) on global matters that they might not have otherwise considered.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Analyse the key factors which drive globalisation
- LO2 Determine the strategic complexities associated with operating in a global environment
- LO3 Evaluate how operating in a global market influences an organisation's structure, culture and functions
- LO4 Develop a global strategy to support decision making for a given organisation.



## Essential Content

### LO1 Analyse the key factors which drive globalisation

#### *Globalisation:*

Definition of globalisation.

The growth of international business and business activities.

The concept and theory of globalisation in terms of cultural, economic, political and social dimensions.

#### *Driving factors of globalisation:*

Factors that drive globalisation, e.g. international economic integration, foreign direct investment, international business and trade.

Factors in relation to cost, market, environment and competition.

#### *Digital factors:*

The significant impact of the digital revolution, including creating better products and services at lower cost, the impact of social media applications and cloud computing for connecting the global community and digitised design, making products and services available to a global market.

International support systems, e.g. payment methods and transactions, the internet and digital business.

#### *The role of innovation:*

Examples of global business success driven by innovative leadership, e.g. Apple, Tesla, Mitsubishi, Google.

The impact of different types of innovation on globalisation, including:

- product innovation, e.g. Fitbit
- process innovation, e.g. supply chain management
- business model innovation, e.g. Amazon, eBay.

**LO2 Determine the strategic complexities associated with operating in a global environment**

*Global strategic complexities:*

The impacts of international trade law.

The economics of globalisation and the environmental impacts of globalisation in the context of the challenges they pose for risk and diversification strategies.

The complexities of the international supply chain management.

*Challenges and opportunities faced by business in the global economy:*

Different legislation and regulatory requirements.

Operating complexities across different time zones.

Cultural differences and cultural diversity

The monetary environment.

Political unrest and instability.

Managing global consumer needs and expectations.

**LO3 Evaluate how operating in a global market influences an organisation's structure, culture and functions**

*Influences on structure, culture and functions:*

Global market influences on organisations in the context of McKinsey's 7S model of organisational structure.

The governance of a multinational organisation and leadership in an international context.

Use of Hofstede's Cultural Dimensions Theory to demonstrate how national cultural differences have an influence on organisations.

The influence of ethical and sustainable globalisation.

**LO4 Develop a global strategy to support decision making for a given organisation.**

*Influences on decision making and strategy:*

The principles of leadership change and the process of internationalisation.

The impact of barriers to international trade on decision making and strategy.

*Global strategy:*

Definition of global strategy.

Global strategy versus international strategy.

Benefits of a global strategy and why it is important.

Different types of global strategy, e.g. standardisation, transnational, export strategies for competing and expanding in international markets.

International expansion strategies and strategic decision making in relation to risk and diversification.

Balancing the need for global integration vs local responsiveness.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>LO1</b> Analyse the key factors which drive globalisation		<b>LO1 and LO2</b> <b>D1</b> Critically evaluate the global business environment, including the opportunities and challenges faced by organisations.
<b>P1</b> Analyse key factors of cost, market, environment and competition that drive global commerce and trade.	<b>M1</b> Critically analyse the impact that key factors have on the global business environment in terms of opportunities and challenges.	
<b>LO2</b> Determine the strategic complexities associated with operating in a global environment		
<b>P2</b> Examine the complexity of strategic challenges faced by organisations when operating in a global environment, supported by specific examples.	<b>M2</b> Evaluate strategic challenges in context of risk and diversification and the supply chain flow.	
<b>LO3</b> Evaluate how operating in a global market influences an organisation's structure, culture and functions		<b>D2</b> Make valid and justified recommendations of how organisations should adapt their organisational structure and strategy to support decision making in a global context.
<b>P3</b> Evaluate the influences of globalisation on organisational governance and leadership, structure, culture and functions. <b>P4</b> Discuss the influences of ethical and sustainable globalisation on organisational functions.	<b>M3</b> Critically evaluate influences of globalisation on organisational structure and culture and functions.	
<b>LO4</b> Develop a global strategy to support decision making for a given organisation.		
<b>P5</b> Evaluate the different ways that decision making can work effectively in a global context. <b>P6</b> Devise objectives and strategies to support global decision making to meet business objectives.	<b>M4</b> Devise strategies that meet a range of different stakeholder perspectives in a global context.	<b>D3</b> Develop strategies that embed an integrated approach across different countries to achieve competitive advantage.

## Recommended Resources

### Textbooks

BARTLETT, C. and BEAMISH, P. (2018). *Transnational Management: Texts, Cases, and Readings in Cross-Border Management*. 8th Ed. Maidenhead: McGraw-Hill.

DANIELS, J. D., RADEBAUGH, L. H. and SULLIVAN D. P. (2018) *International Business Environments and Operations*. 16th Ed. Harlow: Pearson.

DERESKY, H. (2016). *International Management: Managing Across Borders and Cultures*. 9th Ed. Harlow: Pearson.

PENG, M. (2016) *Global Business*. 4th Ed. Cengage Learning.

### Websites

<a href="http://www.global-strategy.net">www.global-strategy.net</a>	Global Strategy (General Reference)
<a href="http://www.worldbusinessculture.com">www.worldbusinessculture.com</a>	World Business Culture Country Profiles (General reference)
<a href="http://www.wto.org">www.wto.org</a>	World Trade Organization Document, Data and Resources (General reference)
<a href="http://www.velocityglobal.com">www.velocityglobal.com</a>	Velocity Global Resources Case studies (General reference)

### Links

This unit links to the following related units:

*Unit 1: Business and the Business Environment*

*Unit 50: International Marketing*

*Unit 56: Tapping into New and International Markets*

# Unit 26: Principles of Operations Management

**Unit code** A/618/5078

**Unit level** 5

**Credit value** 15

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## Introduction

Operations management is everywhere, in every organisation, in every service experienced and in every product consumed. Operations management is the administration of business practices to create the highest level of efficiency possible in an organisation. It is concerned with converting materials and labour into goods and services as efficiently as possible to maximise profits.

The aim of this unit is to introduce students to the role of operations in an organisation, how the nature of operations management has evolved and how it contributes to sustained competitive advantage. Students will understand the key concepts of operations management in an organisational and environmental context, and how this links to supply chain management, products and processes, organisational efficiency and effectiveness, and the achievement of tactical and strategic objectives. A variety of operations management techniques and frameworks will be explored, including continuous improvement, total quality management, benchmarking and risk analysis.

By the end of this unit, students will have an appreciation of the dimensions of operations management and its central role for organisations across a wide range of sectors. Students will also have the knowledge and skills required to progress to higher levels of study or employment in positions in operations, logistics and supply.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Analyse the effectiveness of operations management in contributing to organisational objectives across a wide range of organisations and sectors
- LO2 Apply a range of techniques and analysis frameworks used by operations managers to support decision-making and address problems
- LO3 Apply the concept of continuous quality improvement in an operational context
- LO4 Conduct a strategic risk analysis (SRA) on the operations functions of an organisation.

## Essential Content

### LO1 **Analyse the effectiveness of operations management in contributing to organisational objectives across a wide range of organisations and sectors**

*Operations management in context:*

Definition of 'operations' and 'operations management'.

Evolution of operations management from craft to mass production to mass customisation to agile and lean.

The role and function of operations management in an organisation and across the value chain, e.g. planning, organising, co-ordinating and controlling resources.

The strategic, tactical and operational perspectives of operations management and its contribution to achieving organisational objectives.

Scope of operations management, including relevance to public, private and not-for-profit sectors.

Career opportunities and roles in operations management, e.g. Operations Manager, Logistics Manager, Supply Chain Specialist, Operations Analyst.

Skills and competences required:

- soft skills, e.g. logical approach, quality conformance, communication skills and ethical awareness
- technical skills, e.g. collaborative planning and forecasting, assessing and prioritising risks, business continuity planning and mitigation, integrating and improving systems technologies.

Transformational model of the organisation: input-transformation-outputs.

Dimensions of operations processes, e.g. volume, variety, variation and visibility.

External influences on contemporary operations management, including PESTLE factors, globalisation, sustainability.

Global and ethical sourcing of suppliers and supplies.



*Design and management of supply chain networks:*

Operations and supply chain management interdependencies.

Types of supply chain relationships, including length, breadth, depth.

Types of supply chain networks in manufacturing, services, retail, construction and public sector supply chains.

The impact of operations management on global sourcing and criteria for selecting appropriate suppliers on basis of efficiency, effectiveness, networks, Just-in-Time (JIT) capabilities.

Benefits and risks of deploying technology to drive efficient, effective, sustainable and profitable operations.

The impact of internet-based technologies and the use of database information systems to manage expenditures on goods and services.

**LO2 Apply a range of techniques and analysis frameworks used by operations managers to support decision making and address problems**

*Performance measurement:*

Performance objectives of operations management, e.g. quality, speed, dependability, flexibility and cost.

Setting performance targets.

Defining performance metrics, including financial, customer satisfaction, employee satisfaction, productivity, response rate.

Balanced Scorecard approach to performance measurement: financial, customer, internal processes and learning and growth.

*Techniques and frameworks:*

Control systems and their link to the operational function.

Different types of control systems, to include capacity planning and control, inventory planning and control and supply chain planning and control.

Building a culture of continuous improvement and total quality improvement.

Business Process Re-engineering (BPR) to radically redesign core business processes to achieve productivity and quality improvements.

Cost-benefit analysis for justification of operational decisions, systems or projects.

Valuable, Rare, Inimitable, Organised (VRIO) framework analysis identifying the source of competitive advantage for the organisation.

Benefits of benchmarking for improving organisational performance, e.g. cost position, gaining strategic advantage and increase organisational learning.

*The impact of technology on operations management:*

Applications of technologies to drive performance, e.g. cloud computing, mobile telecommunications, remote working, convergence of technology platforms.

Use of software and cloud-based systems, e.g. Enterprise Resource Planning systems (ERP), Supply Chain Management (SCM), New Product Development (NPD) and Customer Relationship Management (CRM).

### **LO3 Apply the concept of continuous quality improvement in an operational context**

*Role of total quality management in operations management:*

Quality and continuous improvement as a philosophy (Kaizen) and approach.

Differences between total quality and quality assurance.

Pioneers of total quality management such as Deming (plan-do-check-act) and Juran e.g. quality planning-quality control-quality improvement

Approaches to total quality management:

- Just-in-Time (JIT), lean
- quality circles
- statistical process control
- process architecture.

Role of information technologies and software in supporting continuous quality improvement

*Continuous quality improvement in practice:*

Product quality and process quality improvement in relation to compliance to requirements, specifications and customer expectations compared to process efficiency.

Diagnosing quality problems and reducing errors using statistical process control.

Reasons for variations in product quality process quality.

The Taguchi Loss Function, Poka-yoke and the Six Sigma approach to quality improvement.

Quality improvement as a cross-organisational activity and not simply as an independent function.

**LO4 Conduct a strategic risk analysis (SRA) on the operations functions of an organisation.**

*Risk analysis and management:*

Conducting a risk analysis at the operational, tactical and strategic level.

Exploring risk analysis options, e.g. avoid, reduce, transfer, accept.

The use of risk management standards and benchmarks.

A strategic risk analysis as a systematic and continual process for assessing the most significant operational risks facing the organisation.

*Managing uncertainties and potential threats:*

Extending the use of PEST and SWOT to develop contingency plans and strategies to mitigate negative consequences.

Use of risk identification and mapping to support risk assessment and the prioritisation of responses.

*Stakeholder analysis and expectations:*

The relationship between stakeholders and risk, particularly investors, suppliers and customers.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>L01</b> Analyse the effectiveness of operations management in contributing to organisational objectives across a wide range of organisations and sectors		<b>D1</b> Justify the impact of effective operations management and the use of operational techniques on achieving objectives in complex and dynamic trading environments, making valid recommendations and solutions.
<b>P1</b> Analyse the role and effectiveness of operations management across a range of sectors to meet different organisational objectives.  <b>P2</b> Discuss the contribution of effective supply chains to the organisation.	<b>M1</b> Critically analyse the relationship between effective operations management and the achievement of tactical and strategic business objectives.	
<b>L02</b> Apply a range of techniques and analysis frameworks used by operations managers to support decision making and address problems		<b>D2</b> Critically evaluate, giving evidence-based recommendations, different techniques and frameworks used by operations managers to solve complex problems and drive organisational performance.
<b>P3</b> Devise solutions to given operations management problems using a range of techniques and analysis frameworks.  <b>P4</b> Appraise the use of digital technologies for effective operational performance.	<b>M2</b> Evaluate different techniques and analysis frameworks used by operations managers to solve problems and achieve high operational performance.	
<b>L03</b> Apply the concept of continuous quality improvement in an operational context		<b>D3</b> Produce a continuous quality improvement plan, underpinned by theoretical concepts, that justifies approaches and solutions, with reference to costs, benefits and sustainable performance.
<b>P5</b> Evaluate a range of approaches to continuous quality improvement.  <b>P6</b> Prepare a continuous improvement plan based on operational activities in an organisation.	<b>M3</b> Critique a range of total quality management approaches and techniques within the continuous improvement plan in order to achieve organisational objectives.	

Pass	Merit	Distinction
<b>LO4</b> Conduct a strategic risk analysis (SRA) on the operations functions of an organisation.		<b>D4</b> Critically evaluate the significance of strategic risk analysis for organisations operating in diverse and complex environments.
<b>P7</b> Discuss the role and importance of SRA for an organisation.  <b>P8</b> Undertake a SRA for an organisation using risk identification and mapping.	<b>M4</b> Assess a range of contingency plans and strategies available to the organisation as it seeks to manage organisational and stakeholder risk.	

## Recommended Resources

### Textbooks

COLE, G. A. and KELLY, P. (2020) *Management Theory and Practice*. 8th Ed.  
Andover: Cengage.

JACOBS, F. R. and CHASE, R. B. (2017) *Operations and Supply Chain Management*.  
14th Ed. McGraw-Hill Education.

REID, R. D. and SANDERS, N. R. (2019) *Operations Management: An Integrated Approach*.  
7th Ed. Hoboken NJ: Wiley.

SLACK, N. and BRANDON-JONES, A. (2019) *Operations Management*. 9th Ed.  
Harlow: Pearson.

### Websites

<a href="http://www.apics.org">www.apics.org</a>	Association for Operations Management (General reference)
<a href="http://www.cips.org">www.cips.org</a>	Chartered Institute of Procurement & Supply (General reference)
<a href="http://www.ismworld.org">www.ismworld.org</a>	Institute for Supply Management
<a href="http://www.scdigest.com">www.scdigest.com</a>	Supply Chain Digest Resources/Education (General reference)

### Links

This unit links to the following related units:

*Unit 15: Operations Management*

*Unit 36: Procurement and Supply Chain Management*

*Unit 44: Business Information Technology Systems*

# Unit 29: Managing and Running a Small Business

**Unit code** F/618/5115

**Unit level** 5

**Credit value** 15

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## Introduction

Every year new start-up businesses begin trading, but only two-thirds will survive into their third year of trading and just half will remain after five years. For most businesses, it is not a lack of customers or poor-quality products or services that are responsible for their failure but simply a lack of cash and business acumen. It is important to have a basic knowledge of managing a business and an overall understanding of the services offered to customers in order to survive.

This unit will give students a practical understanding of the key aspects of running a small business or social enterprise. Students will learn about the activities involved in running a small business, including developing good relationships with customers, planning and allocating operational resources, forecasting and budgeting, interpreting financial statements, being an employer, dealing with legislation and regulation, and how to put a business plan together.

Students will develop an understanding of how all the different aspects of running a business interrelate so as to achieve success and develop an appreciation of the benefits and importance of organisation and planning.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Explore how a small business or social enterprise plans and allocates resources to achieve objectives
- LO2 Evaluate the customer relationship management process for a small business or social enterprise
- LO3 Develop a cash flow forecast and break-even analysis for a small business or social enterprise
- LO4 Discuss the financial statements, regulation and legislation that apply to a small business or social enterprise.



## Essential Content

### LO1 Explore how a small business or social enterprise plans and allocates resources to achieve objectives

*Planning resources – premises and equipment, people and skills:*

Planning of activities in a business, to include capacity utilisation and management, identifying resources and skills needed to develop appropriate job specifications.

*Being an employer:*

Organisation structures applicable to the business purpose and stage of organisation growth.

Establishing an appropriate organisational culture.

People management, including recruitment and retention, performance management and team building.

Use of outsourcing, networks and external advisers.

Understanding key aspects of employment legislation relevant to a small business, e.g. equality and diversity.

*The business plan:*

Effective articulation of the vision, goals and objectives.

Key components of a business plan.

The key components of a business plan needed when securing an overdraft or bank loan.

Project management techniques, including use of Gantt charts and critical path analysis.

**LO2 Evaluate the customer relationship management process for a small business or social enterprise**

*Building customer relationships:*

Customer value, acquiring and retaining customers.

Developing effective channels for customer communications and customer care programmes.

Digital channels and platforms for effective customer relationships, e.g. mobile devices, social media platforms, online chat and forums for real time responses, online testimonials and ratings.

Value of customer experience mapping and touch point analysis.

*Customer relationship management and transnational sales:*

Benefits of transnational sales.

Dealing with transnational customers.

Preparing to sell and source transnationally, application of the stage model of internationalisation.

The process of exporting and key considerations.

**LO3 Develop a cash flow forecast and break-even analysis for a small business or social enterprise**

*Sources of finance for start-up and small businesses or social enterprise:*

Different sources of finance available, e.g. personal savings, equity finance or loans from family and friends, bank loans and overdrafts, leasing and hire purchase, invoice factoring, business angels, crowd funding.

*Cash flow forecast and break-even analysis:*

The cash flow statement and why it is needed for business.

The three activities (operating, investing and financing) sections of the cash flow statement.

Tracing cash from beginning, projected inflows, projected outflows and ending.

Detailed itemised monthly cash flow forecasting, showing fixed and variable costs set against income.

Calculating break-even point and analysis.

'What-if' sensitivity analysis.

**LO4 Discuss the financial statements, regulation and legislation that apply to a small business or social enterprise.**

*Financial statements for a small business or social enterprise:*

The key financial statements required for a small business and how to interpret them.

The difference between profit and cash, and the vital importance of cash flow for a small business/social enterprise.

The elements of working capital and how to manage cash flow effectively.

*Legal and regulatory issues:*

The legal and regulatory issues applicable to a small business or social enterprise in the country in which it is registered.

Legal requirements for record keeping, tax and employment, health and safety, insurance, data protection and cybersecurity measures.

Examples of regulatory issues that may apply to different business types, different products or services and different localities, such as environmental and waste regulations, professional practice guidelines, local planning restrictions.

The potential sources of information to determine applicable regulation.

## Learning Outcomes and Assessment Criteria

Pass	Merit	Distinction
<b>LO1</b> Explore how a small business or social enterprise plans and allocates resources to achieve objectives		<b>D1</b> Critically analyse the application of appropriate resources to demonstrate links between resource allocation and achievement of business objectives.
<b>P1</b> Discuss the main considerations that a small business or social enterprise needs to address when planning and allocating resources to achieve business objectives.	<b>M1</b> Analyse the importance of planning and allocating appropriate resources to achieve business objectives.	
<b>LO2</b> Evaluate the customer relationship management process for a small business or social enterprise		<b>D2</b> Provide recommendations for overcoming challenges in the customer relationship management process and enhancing the customer experience.
<b>P2</b> Evaluate the effectiveness of a customer relationship management process for a small business or social enterprise in reaching, retaining and supporting customers.	<b>M2</b> Critically evaluate the elements of the customer relationship management process in relation to achieving business objectives for national and transnational sales.	
<b>LO3</b> Develop a cash flow forecast and break-even analysis for a small business or social enterprise		<b>D3</b> Provide a cash flow forecast and break-even analysis that measure financial health and profitability to predict future cash flow and budgeting.
<b>P3</b> Produce a cash flow forecast and break-even analysis for a small business or social enterprise, covering projected income and expenses.	<b>M3</b> Provide a detailed cash flow forecast and break-even analysis that determine the break-even point for profit.	
<b>LO4</b> Discuss the financial statements, regulation and legislation that apply to a small business or social enterprise.		<b>D4</b> Critically evaluate key financial statements, legislation and regulations, taking future developments and changes into account.
<b>P4</b> Examine key financial statements, legislation and regulations that have implications for small businesses or social enterprises.	<b>M4</b> Evaluate how key financial statements, legislation and regulations have implications for small business or social enterprise.	

## Recommended Resources

### Textbooks

BLANCHARD, K., ONCKEN, W. and BURROWS, H. (2015) *The One Minute Manager Meets the Monkey*. London: Harper Collins.

BURNS, P. (2016). *Entrepreneurship and Small Business: Start-up, Growth and Maturity*. 4th Ed. Basingstoke: Palgrave Macmillan.

BURNS, P. (2018) *New Venture Creation: A Framework for Entrepreneurial Start-ups*. 2nd Ed. Basingstoke: Palgrave Macmillan.

RIDLEY-DUFF, R. and BULL, M. (2019) *Understanding Social Enterprise: Theory and Practice*. Sage Publications Ltd.

### Websites

<a href="http://www.entrepreneur.com">www.entrepreneur.com</a>	Entrepreneur (General reference)
<a href="http://www.entrepreneurhandbook.co.uk">www.entrepreneurhandbook.co.uk</a>	Entrepreneur Handbook (General reference)
<a href="http://www.forbes.com">www.forbes.com</a>	Forbes Small Business Entrepreneurs (Articles)
<a href="http://www.isbe.org.uk">www.isbe.org.uk</a>	The Institute for Small Business and Entrepreneurship (General reference)

### Links

This unit links to the following related units:

*Unit 9: Entrepreneurial Ventures*

*Unit 16: Managing the Customer Experience*

*Unit 27: Identifying Entrepreneurial Opportunities*

*Unit 28: Launching a New Venture*

*Unit 53: Planning for Growth*

# Unit 48: Customer Value Management

<b>Unit code</b>	<b>F/618/5129</b>
<b>Unit level</b>	<b>5</b>
<b>Credit value</b>	<b>15</b>

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## Introduction

This unit is designed to enhance students' knowledge and understanding of why it is important for marketers to enhance and manage the value of customer interactions. Students will learn underpinning theories and frameworks, and will be expected to relate them to real-world examples, including their own experiences.

Organisations ideally seek a mutually beneficial relationship between themselves and their customers. This is particularly important when considering the costs associated with acquiring a new customer. It has been suggested that it can cost five times as much to gain a new customer as it is to retain an existing one. Moreover, there is no guarantee that a new customer will be as loyal as a current one. Any organisation, whether for profit, NGO or a charity, seeks ways of retaining customers through enhanced customer experiences.

To retain loyal (and profitable) customers, organisations seek to understand them better. By understanding customers through the capture of relevant data, organisations can enhance a customer's lifetime value. They then aim to build a relationship with the customer where they remain loyal and continue to purchase a range of products and services.

The knowledge, understanding and skill sets that students will gain on successfully completing this unit will enhance their career opportunities, whether they are setting up in business independently or if they are employed by an organisation.

## **Learning Outcomes**

By the end of this unit a student will be able to:

- LO1 Examine the concept of customer lifetime value, how to calculate it and the different factors that influence it
- LO2 Evaluate the different segments in a customer base and the appropriate opportunities for customer value creation
- LO3 Apply appropriate techniques and methods in order to increase customer lifetime value.

## Essential Content

### LO1 **Examine the concept of customer lifetime value, how to calculate it and the different factors that influence it**

*Traditional concepts of marketing compared with those of value and retention:*

The benefits of managing customer value, satisfaction and retention.

Customer lifetime values (CLVs).

Merits of CLVs.

Value of customer data.

Measurement and analysis of CLVs.

The key factors that drive CLV, e.g. transaction value, number of repeat sales, customer retention.

*How to calculate and increase your CLV:*

Determining your customer acquisition costs, repeat transactions and customer retention rate.

Calculations applied to calculate CLV.

Creating balance in the business model.

*Factors influencing CLVs:*

CLVs in both a B2C and B2B context.

Customer experience and how it can affect CLVs.



## **LO2 Evaluate the different segments in a customer base and the appropriate opportunities for customer value creation**

*Marketing segmentation:*

The role of segmentation, targeting and positioning (STP) to identify lifetime value opportunities.

*Identification and diagnosis of value creation opportunities:*

Customer perceptions, e.g. selection, nature of stimulus, expectations, motives and selective perception.

Consumer imagery, covering:

- product and service positioning
- price
- quality relationships
- company's image.

How consumers store, retain and retrieve information.

Involvement theory and consumer relevance.

Measures of consumer learning, including recognition and recall, responses to media, brand loyalty.

Perceived risk and methods for handling risk.

Acquisition costs in relation to CLVs.

Basic B2C and B2B decision-making models.

## **LO3 Apply appropriate techniques and methods in order to increase customer lifetime value.**

*Strategies for enhancing customer lifetimes values in both a B2C and B2B context:*

Strategies for building long-term customer relationships and making CLV a strategic priority.

Digital strategies, including increased connectivity with customers through mobile device, apps, social media and online chat and forums.

Use of advanced technology such as the 'Internet of Things' and cognitive systems to gather real-time data and predict and forecast market trends.

Creating brand loyalty.

*Techniques and methods:*

Different types of communication to build brand loyalty and advocacy.

Personalisation of content and leveraging dynamic content on website, app, social media to target specific personal preferences.

Rewarding loyalty by creating exclusive offers and choosing the right rewards and incentives.

Value-driven cross-selling and upselling.

Developing multiple points and channels of contact.

## Learning Outcomes and Assessment Criteria

Pass		Merit	Distinction
<b>LO1</b> Examine the concept of customer lifetime value, how to calculate it and the different factors that influence it			<b>LO1, LO2 and LO3</b>  <b>D1</b> Provide evidence of critical evaluation and synthesis of the key concepts of customer lifetime value management in an organisational context.
<b>P1</b> Discuss the various components that enable an organisation to determine and calculate a customer's lifetime value.		<b>M1</b> Analyse the concept of customer lifetime value and the use of collating customer data in either a B2C or B2B context.	
<b>P2</b> Explore the factors that influence the customer lifetime value.			
<b>LO2</b> Evaluate the different segments in a customer base and the appropriate opportunities for customer value creation			
<b>P3</b> Determine the types of market segmentation strategies that can be applied to a customer base.		<b>M2</b> Critically evaluate various segmentation models in a B2C or B2B context to generate key insights and marketing intelligence for customer value creation.	
<b>P4</b> Evaluate B2C and B2B decision-making models and demonstrate how opportunities for customer value creation can be applied.			
<b>LO3</b> Apply appropriate techniques and methods in order to increase customer lifetime value.			
<b>P5</b> Apply different techniques and methods to increase customer relationships and customer loyalty in a given organisation.		<b>M3</b> Apply appropriate techniques and methods at different stages of the consumer decision-making process and CLV.	

## Recommended Resources

### Textbooks

BUTTLE, F. and MAKLAN, S. (2019) *Customer Relationships Management: Concepts and Technologies*. 4th Ed. Oxford: Routledge.

GOODMAN, J. (2019) *Strategic Customer Service: Managing the Customer Experience to Increase Positive Word of Mouth, Build Loyalty, and Maximize Profits*. 2nd Ed. Maidenhead: Amacom.

KUMAR, V. and REINARTZ, W. (2018) *Customer Lifetime Value: Concept, Strategy and Tools*. 3rd Ed. Springer.

### Websites

www.acca-global.com	Customer Care Association Global Research and publications (General reference)
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www.mckinsey.com	McKinsey & Company The expanding role of design in creating an end-to-end customer experience (Article)
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www.mindtools.com	Mind Tools Customer Experience Mapping (General reference)
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### Links

This unit links to the following related units:

*Unit 2: Marketing Processes and Planning*

*Unit 33: Marketing Insights and Analytics*

*Unit 35: Integrated Marketing Communications*

*Unit 51: Brand Management*