

# **ATHE Level 7 Qualifications in Management**

ATHE Level 7 Award in Programme Leadership (QCF)  
ATHE Level 7 Award in Sustainable Business Strategy (QCF)  
ATHE Level 7 Certificate in Developing Organisational Vision and Strategic Direction (QCF)  
ATHE Level 7 Certificate in Finance for Strategic Managers (QCF)  
ATHE Level 7 Certificate in Manage Continuous Organisation Improvement (QCF)  
ATHE Level 7 Certificate in Research for Senior Managers (QCF)  
ATHE Level 7 Certificate in Strategic Management (QCF)  
ATHE Level 7 Diploma in Strategic Management (QCF)



## About ATHE

An Ofqual regulated awarding organisation, providing QCF qualifications in management, health & social care management and travel & tourism management.

We are known for our excellent customer service, efficient support and flexible qualifications that offer diverse progression routes.

## Our Qualifications

Our management qualifications are the culmination of expert input from colleges, sector skills councils, industry professionals and our qualification development team. We have taken advantage of the flexibility of the QCF to develop a suite of awards, certificates and diplomas that offer progression from level 4 up to level 7.

Key features of the qualifications include:

- core units that are common to different sectors offering the opportunity for learners to move between sectors or delay decisions as to which area to specialise in
- small qualifications that can be used for professional development for those in employment or for learners who do not have the time to undertake a full time programme
- flexible methods of assessment allowing tutors to select the most appropriate methods for their learners

## Support for Centres

We are committed to supporting our centres and offer a range of training, support and consultancy services including:

- qualification guidance, suggested resources and sample assignments
- an ATHE centre support officer who guides you through the centre recognition process, learner registration and learner results submission
- health check visits to highlight any areas for development
- an allocated ATHE associate for advice on delivery, assessment and verification

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## ATHE QCF Qualifications at Level 7 in this Specification

This document provides key information on ATHE's suite of Level 7 QCF qualifications in Management, including the rules of combination, the content of all the units and guidance on assessment and curriculum planning. It should be used in conjunction with the ATHE handbook "Delivering ATHE Qualifications". Further guidance and supporting documentation on curriculum planning, internal verification and assessment is provided separately in the Delivering ATHE Qualifications Guide and via the ATHE website.

These qualifications have been accredited to the Qualifications and Credit Framework (QCF). Each qualification has a Qualification Accreditation Number (QAN). This number will appear on the learner's final certification documentation. Each unit within a qualification also has a QCF code.

The QAN numbers for these qualifications are as follows:

ATHE Level 7 Award in Programme Leadership (QCF)	600/3401/4
ATHE Level 7 Award in Sustainable Business Strategy (QCF)	600/3400/2
ATHE Level 7 Certificate in Developing Organisational Vision and Strategic Direction (QCF)	600/3410/5
ATHE Level 7 Certificate in Finance for Strategic Managers (QCF)	600/3414/2
ATHE Level 7 Certificate in Manage Continuous Organisation Improvement (QCF)	600/3411/7
ATHE Level 7 Certificate in Research for Senior Managers (QCF)	600/3399/X
ATHE Level 7 Certificate in Strategic Management (QCF)	600/3421/X
ATHE Level 7 Diploma in Strategic Management (QCF)	600/3407/5

### Accreditation Dates

These qualifications are accredited from 1st October 2011, which is their operational start date in centres.

### Entry Requirements

These qualifications are designed for learners from aged 19 and above. However ATHE does not specify any entry requirements. Centres are required to ensure that learners who undertake these qualifications have the necessary background knowledge, understanding and skills to undertake the learning and assessment.

## Introduction to ATHE's Level 7 QCF Qualifications in Management

These qualifications in Management have been developed to conform to the requirements of the QCF, to meet the requirements of employers, to meet the needs of learners and to respond to the needs of our centres.

These qualifications are not tied to any specific industry but deliver the skills, knowledge and understanding that meet the needs of managers in different sectors on a domestic and international platform.

We provide a flexible route for learners who have already achieved management qualifications at a lower level and for learners who do not have business or management qualifications, but may have qualifications in other areas and/or prior management experience in the work place.

Our suite of qualifications is designed to provide:

- maximum flexibility with a range of different sized level 7 awards and certificates for those who only wish or have the time to initially take smaller qualifications and then build up qualifications over time
- opportunities for learners to acquire knowledge and understanding and develop a range of skills, personal qualities and attitudes essential for successful performance in working life
- awards and certificates, in particular specialisms that are directly related to learners' current responsibilities or that meet a particular interest and support career development
- opportunities for learners who wish to undertake a full time course of study leading to a Diploma

### **Awards**

Our Awards allow learners to focus on the development of knowledge, understanding and skill in a particular area.

### **Certificates**

Our Certificates allow learners to either focus on a particular area of knowledge or develop broader knowledge, understanding and skills in areas of their choice through a choice of options.

### **Diploma**

Our Diploma allows learners to acquire a broader range of knowledge and understanding and to develop the key skills they require to work as a senior manager. This is done through learning in a number of mandatory units together with a choice of options.

### **Recognition**

These qualifications have been developed with the support of the sector skills council, the Council for Administration.

## **National Occupational Standards**

The ATHE Level 7 qualifications in Management provide much of the underpinning knowledge and understanding for the National Occupational Standards in Management and Leadership.

## **Progression**

On successful completion of a Level 7 qualification in Management there are a number of progression opportunities.

Learners may progress to:

- larger qualifications at the same level e.g. from an award to a certificate or to the Diploma in Strategic Management or the Diploma in Healthcare Management
- an MBA programme and claim exemptions for some of the units completed

## **Recognition of Prior Learning (RPL)**

The Qualifications and Credit framework is based on the principle of credit accumulation and transfer. Within this suite of qualifications, learners have the opportunity to build their achievements from a single unit into a full Diploma.

There will be occasions where learners wish to claim recognition of prior learning that has not been formally assessed and accredited. ATHE has provided detailed guidance on RPL which is available for centres on the ATHE website and centres may also contact ATHE directly to obtain further clarification or discuss the requirements for RPL.

## **Support for ATHE Qualifications**

ATHE provides a wide range of support. This includes:

- a comprehensive guide for centres on delivering ATHE qualifications
- materials on our website to support assessment and teaching and learning
- sample assignments which have been written and verified by experienced practitioners
- verification and guidance with internally devised assignments
- training events to support the delivery of the qualifications and assessment
- the services of a team of experienced advisors and external verifiers
- support for business development

# ATHE Level 7 QCF Qualifications in Management

## Credit values and rules of combination

The QCF is a framework which awards credit for qualifications and units and aims to present qualifications in a way that is easy to understand and measure. There are three sizes of qualification in the QCF:

- Award, between 1 and 12 credits
- Certificate, between 13 and 36 credits
- Diploma, 37 credits and above.

Each unit within a qualification has a credit value and a level. The credit value specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of a unit. The level is an indication of relative demand, complexity and depth of achievement and autonomy.

Each credit represents 10 hours of learning time. The learning time is a notional measure which indicates the amount of time a learner at the level of the unit is expected to take, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria. Learning time includes activities such as directed study, assessment, tutorials, mentoring and individual private study. The credit value of the unit will remain constant in all contexts regardless of the assessment method or the mode of delivery. Learners will only be awarded credits for the successful completion of whole units.

Each unit also contains information on guided learning hours. Guided learning hours are intended to provide guidance for centres on the amount of resource needed to deliver the programme and support learners i.e. the time required for face to face delivery, tutorials, workshops and feedback on associated assessments.

Each qualification has agreed rules of combination which indicate the number of credits to be achieved, which units are mandatory and the choice of optional units. The rule of combination for each qualification is given below.



## ATHE Level 7 Award in Programme Leadership (QCF)

The ATHE Level 7 Award in Programme Leadership is a 10 credit qualification. Learners must complete one mandatory unit.

Unit Title	Level	Credit	GLH
Programme Leadership	7	10	40

## ATHE Level 7 Award in Sustainable Business Strategy (QCF)

The ATHE Level 7 Award in Sustainable Business Strategy is a 10 credit qualification. Learners must complete one mandatory unit.

Unit Title	Level	Credit	GLH
Sustainable Business Strategy	7	10	40

## ATHE Level 7 Certificate in Developing Organisational Vision and Strategic Direction (QCF)

The ATHE Level 7 Certificate in Developing Organisational Vision and Strategic Direction is a 15 credit qualification. Learners must complete one mandatory unit.

Unit Title	Level	Credit	GLH
Developing Organisational Vision and Strategic Direction	7	15	60

## ATHE Level 7 Certificate in Manage Continuous Organisation Improvement (QCF)

The ATHE Level 7 Certificate in Manage Continuous Organisation Improvement is a 15 credit qualification. Learners must complete one mandatory unit.

Unit Title	Level	Credit	GLH
Manage Continuous Organisational Improvement	7	15	60

## ATHE Level 7 Certificate in Finance for Strategic Managers (QCF)

The ATHE Level 7 Certificate in Finance for Strategic Managers is a 15 credit qualification. Learners must complete one mandatory unit.

Unit Title	Level	Credit	GLH
Finance for Strategic Managers	7	15	60

## ATHE Level 7 Certificate in Research for Senior Managers (QCF)

The ATHE Level 7 Certificate in Research for Senior Managers is a 25 credit qualification. Learners must complete one mandatory unit.

Unit Title	Level	Credit	GLH
Research for Senior Managers	7	25	60

## ATHE Level 7 Certificate in Strategic Management (QCF)

The ATHE Level 7 Certificate in Strategic Management is a 30 credit qualification. Learners must complete two of the four units to achieve 30 credits.

Unit Title	Level	Credit	GLH
Organisational Behaviour	7	15	60
Global Business Strategy	7	15	60
Strategic Resource Management	7	15	60
Finance for Strategic Managers	7	15	60

## ATHE Level 7 Diploma in Strategic Management

The ATHE Level 7 Diploma in Strategic Management is a 120 credit qualification. Learners must complete the five mandatory units totalling 85 credits plus a further three or four units from the list of optional units to achieve a minimum of 120 credits.

Unit Title	Level	Credit	GLH
<b>Mandatory Units</b>			
Organisational Behaviour	7	15	60
Global Business Strategy	7	15	60
Strategic Resource Management	7	15	60
Finance for Strategic Managers	7	15	60
Research for Senior Managers	7	25	60
<b>Optional Units</b>			
Human Resource Management	6	15	60
Project Management	6	15	60
Programme Leadership	7	10	40
Economics for Business	6	15	60
Risk Management	6	10	40
Strategic Marketing	6	15	60
Corporate Communications Strategies	7	10	30
Manage Continuous Organisational Improvement	7	15	60
Sustainable Business Strategy	7	10	40
Strategic Planning	7	15	45
Managing Quality and Service Delivery	6	10	40
Personal Leadership and Management Development	6	10	40

## Guidance on Assessment

For all ATHE qualifications assessment is completed through the submission of internally assessed student work. To achieve a pass for a unit, a learner must have successfully achieved all the learning outcomes at the standards set by all the assessment criteria for that unit. There is no external assessment (i.e. external written examination) attached to any unit; nor is there any dissertation requirement. However, learners taking the Level 7 Diploma in Strategic Management will be required to complete a research project.

ATHE provides a sample assignment for each unit which can be used as the assessment for the unit. We allow you to develop your own assignments so you have the opportunity to put assignments in a context that is appropriate for your learners. Any assignments that you devise will need to be submitted to ATHE for approval before delivery of the programme.

An assignment can relate to a single unit or an integrated assignment, incorporating more than one unit, can be used provided the content of the assignment is clearly mapped to show which assessment criteria from which units are being covered.

## Methods of Assessment

In the centre's assessment strategy ATHE encourages the use of a range of assessment vehicles that will engage learners and give them an opportunity to both demonstrate their knowledge and understanding of a topic and to evaluate how they might apply that knowledge in a given context.

We would recommend avoiding essay writing and that more varied types of assessment are included. This might include assessment through:

- a research activity resulting in the compilation of a report
- an academic paper or article for publication
- the compilation of a case study
- a critical review and evaluation of a chosen company's policies, procedures and systems
- a set project completed for an employer (also known as an 'employer-engagement' activity)
- the production of a portfolio of evidence relating to a particular unit

This list is by no means exhaustive, but gives examples of some creative assessment methods that could be adopted.

## Putting an Assessment Strategy in Place

You will need to demonstrate to your External Verifier that you have a clear assessment strategy supported by robust quality assurance in order to meet the ATHE requirements for registering learners for a qualification. In devising your assessment strategy, you will need to ensure:

- devised assignments are clearly mapped to the unit learning outcomes and assessment criteria they have been designed to meet
- that the command verbs used in the assignment are appropriate for the level of the qualification, e.g. analyse, evaluate, synthesise
- that the assignment gives the learner sufficient opportunity to meet the assessment criteria at the right level, through the work they are asked to complete (The QCF level descriptors will be helpful to you in determining the level of content of the assessment)
- students are well-briefed on the requirements of the unit and what they have to do to meet them
- assessors are well trained and familiar with the content of the unit/s they are assessing
- there is an internal verification process in place to ensure consistency and standardisation of assessment across the qualification
- assessment decisions are clearly explained and justified through the provision of feedback to the learner
- that work submitted can be authenticated as the learner's own work and that there is clear guidance on the centre's Malpractice Policy
- that there is an assessment plan in place identifying dates for summative assessment of each unit and indicating when external verification will be needed
- sufficient time is included in the assessment planning to allow the learners time for any necessary remedial work that may be needed prior to certification

## Quality Assurance of Centres

Centres delivering ATHE QCF qualifications must be committed to ensuring the quality of the units and qualifications they deliver, through effective standardisation of assessors and verification of assessor decisions. ATHE will rigorously monitor the application of quality assurance processes in centres.

ATHE's quality assurance processes will involve:

- centre approval for those centres who are not already recognised to deliver ATHE qualifications
- approval to offer ATHE QCF qualifications and units in Management at Levels 6 and 7
- monitoring visits to ensure the centre is continuing to work to the required standards

Once a centre registers learners for a qualification, they will be allocated an External Verifier.

Centres will be required to undertake training and standardisation activities as agreed with ATHE. Details of ATHE's quality assurance processes are provided in the ATHE Guide: "Delivering ATHE Qualifications" which is available on our website.

## Malpractice

Centres must have a robust Malpractice Policy in place, with a clear procedure for implementation. Centres must ensure that any work submitted for verification can be authenticated as the learner's own. Any instance of plagiarism detected by the External Verifier during sampling, will immediately be investigated and could lead to sanctions against the centre.

Centres should refer to the Delivering ATHE Qualifications Guide and the ATHE Malpractice and Maladministration Policy on the ATHE website.

## Guidance for Teaching and Learning

Within the support materials for the units you will find some suggestions and ideas for teaching and learning activities which we hope will be helpful in getting centre practitioners started with schemes of work and session plans. You can adapt these ideas to suit your own context and the interests of your students.

Learners learn best when they are actively involved in the learning process. We would encourage practitioners delivering our qualifications to use a range of teaching methods and classroom-based activities to ensure learners are engaged in the learning, as this facilitates understanding and progress. Learners should be encouraged to take responsibility for their learning and should be able to demonstrate a high degree of independence in applying the skills of research and evaluation. You can facilitate this by using engaging methods of delivery that involve active learning rather than relying on traditional methods of lecture delivery to impart knowledge.

Your approach to delivery should give the learners sufficient structure and information on which to build without you doing the work for them. In achieving the right balance you will need to produce well-planned sessions that follow a logical sequence.

### Top Tips for Delivery

- Adopt a range of teaching and learning methods, including active learning.
- Plan sessions well to ensure a logical sequence of skills development.
- Include study skills aspects, e.g. how to construct a report or Harvard Referencing.
- Build time into your scheme of work and session plans to integrate study skills teaching.
- Set structured additional reading and homework tasks to be discussed in class.
- Elicit feedback from your students. Get them to identify where the work they've done meets the assessment criteria.
- Contextualise your activities, e.g. using real case studies as a theme through the sessions.
- Take an integrated approach to teaching topics across units, where appropriate, rather than always taking a unit-by-unit approach. In this way, learners will be able to see the links between the content of the different units.

There is further guidance on teaching and learning in the Delivering ATHE Qualifications Guide.

## Resources

ATHE has provided a list of suggested resources for each unit. Please refer to the support materials for each unit on our website.

## Access and Recruitment

ATHE's policy with regard to access to its qualifications is that:

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

Centres are required to recruit learners to ATHE qualifications with integrity. This will include ensuring that all learners have appropriate information and advice about the qualifications. Centres should put in place appropriate systems to assess a learner's suitability for a programme and make a professional judgement about their ability to successfully achieve the designated qualification. This assessment should take account of any support available to the learner within the centre during the programme of study and any support that may be required to allow the learner to access the assessment for the units within the qualification.

## Access Arrangements and Special Considerations

ATHE's policy on access arrangements and special consideration aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the Equality Act 2011) without compromising the assessment of skills, knowledge and understanding. Further details are given in the Reasonable Adjustments and Special Considerations Policy, which can be found on our website.

## Restrictions on Learner Entry

The ATHE Level 7 qualifications in Management are accredited on the QCF for learners aged 19 and above.



## Unit Specifications

### Unit Format

Each unit in ATHE's suite of level 7 qualifications is presented in a standard format. This format provides guidance on the requirements of the unit for learners, tutors, assessors and external verifiers.

Each unit has the following sections:

### Unit Title

The unit title reflects the content of the unit. The title of each unit completed will appear on a learner's statement of results.

### Unit Aims

The unit aims section summarises the content of the unit.

### Unit Code

Each unit is assigned a QCF unit code that appears with the unit title on the Register of Regulated Qualifications.

### QCF Level

All units and qualifications in the QCF have a level assigned to them which represents the level of achievement. The level of each unit is informed by the QCF level descriptors. The QCF level descriptors are available on the ATHE website.

### Credit Value

The credit value is the number of credits that may be awarded to a learner for the successful achievement of the learning outcomes of a unit.

### Guided Learning Hours (GLH)

Guided learning hours are an indicative guide to the amount of input that a tutor will provide to a learner, to enable them to complete the unit. This includes lectures, tutorials and workshops and time spent by staff assessing learners' achievement when they are present.

### Learning Outcomes

The learning outcomes set out what a learner is expected to know, understand or be able to do as the result of the learning process.

### Assessment Criteria

The assessment criteria describe the standards a learner is expected to meet in order to demonstrate that the learning outcome has been achieved. Command verbs reflect the level of the qualification e.g. at Level 7 you would see words such as analyse, evaluate and synthesise.

### Unit Indicative Content

The unit indicative content section details the range of subject material for the programme of learning for the unit.

<b>7.1 Organisational Behaviour</b>	
<b>Aims</b>	To explore the importance of different forms of organisational behaviours in organisational effectiveness and efficiency. To understand the importance of organisational structure, culture, motivation, creativity and leadership.
<b>Unit Level</b>	7
<b>Unit Code</b>	J/503/5092
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. The learner will need to demonstrate their understanding of complex theories and concepts to meet the standards required for this unit. Learners should use actual examples from their own experience and research to support their work. The learner must also apply their understanding to specific organisations in order to achieve LO2 and LO4.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Understand effective leadership behaviour theory and practice	1.1 Evaluate leadership theories 1.2 Evaluate the impact of managerial styles on organisational effectiveness 1.3 Analyse how motivational theory can inform employee motivation 1.4 Analyse theories relating to work relationships and interaction
2. Understand how organisational structures and culture impact on the effectiveness of the organisation	2.1 Analyse the characteristics of different organisational structures 2.2 Evaluate the importance of organisational culture theory in developing organisational effectiveness 2.3 Analyse the culture and structure of one organisation and evaluate how they impact on its effectiveness
3. Understand how the organisation can improve employee effectiveness to respond to business opportunities	3.1 Analyse how organisation can facilitate innovation and creativity 3.2 Assess the importance of learning in organisations 3.3 Evaluate the effectiveness of team working 3.4 Analyse the effective management of change in organisations
4. Understand organisational decision making	4.1 Analyse approaches to organisational decision making 4.2 Assess approaches to risk and uncertainty in decision making

	4.3 Evaluate the effectiveness of organisational decisions in a specific organisation
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## Indicative Content

### 1. Understand effective leadership behaviour theory and practice

Leadership versus management

Leadership theory

- Personal leadership traits, trait theories (e.g. Allport, Eysenck, Cattell); 'great man' theory of leadership; contingency theories (e.g. Fiedler, cognitive resource theory); situational theories (e.g. Hersey and Blanchard, Vroom and Yetton); behavioural theories (e.g. role theory, managerial grid/leadership grid); participative theories (e.g. Lewin/Likert, transformational v transactional leadership, emotional intelligence)

Managerial styles

- Autocratic, democratic, paternalistic, laissez-fair

Motivational theory

- Including Taylorism, Mayo, Maslow, Herzberg, McGregor, Broad theories (eg. temporal motivation theory), cognitive theory

Working relationships and interaction

- Power, behavioural theories, social constructivism

### 2. Understand how organisational structures and culture impact on the effectiveness of the organisation

Organisational structure

- Bureaucracies, stakeholders, re-engineered corporation, modular, networked and atomised organisations, virtual organisations, line, staff & functional structures, formal and informal organisations, designing organisation structure, centralisation and decentralisation

Organisational culture

- Harrison - power, role, person, task cultures; Likert – autocratic, benevolent autocratic, consultative participative; Mintzberg – simple, machine bureaucracy, divisional, adhocracy; Pedlar et al – the learning organisation

How structure and culture impact on effectiveness

Leader as a change agent

### 3. Understand how the organisation can improve employee effectiveness to respond to business opportunities

Innovation and creativity

- Organisational culture, integration / interaction of disciplines and teams, attitude to risk, rewards

Organisational learning

- The learning, learning culture, knowledge capture and management, technical knowledge versus experiential knowledge, technology

### Measuring performance

- Metrics, KPI, business scorecard, working in teams, group dynamics, teams versus groups, communications, collaboration and team decision making, motivation of groups

### Managing change

- Changes (reorganisation, restructuring, merger and acquisition, downsizing), communicating and managing change

## **4. Understand organisational decision making**

### Decision making approaches

- Normative, prescriptive and descriptive approaches, economic or rational choice model, Simon's bounded rationality model, incremental bargaining method, well managed model (Peters and Waterman), quantitative approaches

### Risk and uncertainty

- Role of stakeholders, attitudes to risk, risk identification and analysis, risk management planning, enterprise risk management

### Effectiveness of decision making

- Analysis and comparison of management decisions, evaluating decisions

<b>7.2 Global Business Strategy</b>	
<b>Aims</b>	To explore the strategic responses of organisations to the rapidly changing global business environment. To understand the strategies and processes used to manage international businesses in differing geographical and cultural situations. To understand the importance of managing within a framework of corporate social responsibility.
<b>Unit Level</b>	7
<b>Unit Code</b>	R/503/5094
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	Assignments in accordance with awarding organisation guidance
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Be able to analyse the international business environment	1.1 Review and assess suitable techniques to analyse the business environment 1.2 Analyse the micro-environment of a business 1.3 Analyse the macro-environment of a business 1.4 Analyse how the international business environment impacts on an organisation
2. Understand the impact of globalisation on business organisations	2.1 Analyse the extent of globalisation on organisations 2.2 Assess the benefits, opportunities and challenges of globalisation for an organisation 2.3 Analyse the structures of different organisations operating in international markets 2.4 Critically evaluate the international operations of an organisation
3. Understand the importance and nature of Corporate Social Responsibility	3.1 Analyse the moral and ethical questions facing organisations in an international environment 3.2 Analyse the conflicts between corporate strategy and ethical and social responsibilities 3.3 Identify legislation, regulation and guidance relating to corporate social responsibility

## **Indicative Content**

### **1. Be able to analyse the international business environment**

#### Analysis techniques

- Environmental analysis and diagnostics, environmental audit, Porter's diamond (The Competitive Advantage of Nations - Porter), PESTLE, 'five forces' analysis

#### Micro-environment

- Stakeholders, suppliers, customers, competitors, market intermediaries

#### Macro-environment

- External climate, economic, political and legal environment (national and international), cultural environment, resources (capital, people and natural), technology

International business environment, culture, CSR, politics, environmental issues, globalisation

### **2. Understand the impact of globalisation on business organisations**

#### History

- Economic theory, dependency theory, non-western cultures, maritime European empires, industrialisation, trade and empire, Bretton Woods, development of communications, information technology

#### Extent of globalisation

- Trade, labour movement, cultural exchange, technical development and exchange, capital

#### Effects of globalisation

- Effects on markets, business change, capital, jobs and outsourcing, cultural dominance, natural resources, conflict; debates: benefits and challenges of globalisation, advocates and critics

#### Structures

- International business organisation, international supply chain management, business structures, outsourcing, international communications

#### Operations

- International business conduct, competition in different markets, international brand development, protection of IP, trade partnerships, politics and regulation, security, ethics

### 3. Understand the importance and nature of corporate social responsibility

#### Moral and ethical questions

- Organisation purpose, nature of business ethics, corporate responsibility, social responsibility, corporate accountability, corporate governance, cultural conflict (eg. nature of bribes and rewards), different economic models, different ethical frameworks (theories: deontological and utilitarianism), Hofstede, Hall (monochronic and polychronic cultures)

#### Conflicts

- Current conflicts and issues should be examined. Examples include: climate change and environmentalism, anti-globalisation and social responsibility, 'Peak oil', greater insecurity, relationships with government, technological change and privacy concerns, social media, intellectual property issues

#### Legislation

- UK, European, global and other national legislation and guidance; global agreements on carbon; legislation on pollution; agreements on issues affecting specific industries e.g. fishing agreements; institutions; codes of practice and guidelines from international (e.g. OECD, ISGN), and industry (e.g. ISAR) bodies, reporting mechanisms (audit standards)



<b>7.3 Strategic Resource Management</b>	
<b>Aims</b>	To explore the mechanisms for managing resources to achieve the business objectives of organisations. To understand the roles and strategies used in acquiring, managing, and developing human, physical and technological resources. To understand the importance of marketing in achieving business aims and objectives, and the roles, strategies and processes used to manage the marketing function
<b>Unit Level</b>	7
<b>Unit Code</b>	D/503/2019
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. The learner must demonstrate understanding of strategic resource management in general and carefully select one organisation to focus on certain aspects including the role of HR management, HR planning, recruitment and retention strategies, employee development, physical resource management and planning, and marketing operations.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Understand the role of human resource management in supporting business strategy	1.1 Investigate how human resource management contributes to the achievement of organisational objectives 1.2 Critically evaluate the role of human resource management within an organisation 1.3 Appraise the processes that an organisation uses to plan its human resource requirements
2. Know how to develop human resources in organisations	2.1 Evaluate the recruitment and retention strategies used in an organisation 2.2 Critically assess the techniques that are used for employee development in an organisation 2.3 Evaluate the contribution of human resource development techniques in ensuring employee engagement 2.4 Systematically analyse the effectiveness of human resource management strategies in supporting organisational strategy

<p>3. Understand the role of physical resource management in supporting business strategy</p>	<p>3.1 Investigate how physical resource management contributes to the achievement of organisational objectives</p> <p>3.2 Critically evaluate the role of physical resource management within an organisation</p> <p>3.3 Systematically appraise the processes that an organisation uses to plan its physical requirements</p>
<p>4. Understand the role of marketing in supporting business strategy</p>	<p>4.1 Investigate how marketing activities contribute to the achievement of organisational objectives</p> <p>4.2 Critically evaluate the role of marketing operations within an organisation</p> <p>4.3 Systematically appraise the processes that an organisation uses to develop its markets</p>
<p>5. Understand the role of information systems management in supporting business strategy</p>	<p>5.1 Investigate how information systems management contributes to the achievement of organisational objectives</p> <p>5.2 Critically evaluate the role of information systems management within an organisation</p> <p>5.3 Systematically appraise the processes that an organisation uses to plan its information systems requirements</p>

## **Indicative Content**

### **1. Understand the role of human resource management in supporting business strategy**

Organisational forms; definition and characteristics of HR management approach; role of HR management function (e.g. development of role from welfare to personnel to HR); strategic HR management; HR models (e.g. contingency, best practice, Harvard Framework, Guest, Patterson); models of HR management roles (e.g. Legge, Tyson and Fell); key HR management activities: employee engagement, performance management, building organisational capabilities, organisational learning, policies and procedures

### **2. Know how to develop human resources in organisations**

Recruitment metrics and return on investment (cost, speed of recruitment, acceptance rate etc.); monitoring and evaluating recruitment and retention; bonus and remuneration policy; employee and group performance metrics; skills audits, training needs analysis, training, job design, and employment law, HR evaluation, enablement of learning

### **3. Understand the role of physical resource management in supporting business strategy**

Identifying and evaluating physical assets/investments, assessing return on investment, assets control, logistics (inbound and outbound), security, operational performance and evaluation, outsourcing, resource allocation, physical resource optimisation

### **4. Understand the role of marketing in supporting business strategy**

External and internal environmental analysis, strategic marketing objectives, role of marketing and marketing plan, cross-functional interaction of marketing, marketing audit; marketing metrics and measuring marketing performance e.g. return on investment, post investment appraisal, performance versus objectives, profile targets, brand evaluation, customer lifetime value models

### **5. Understand the role of information systems management in supporting business strategy**

Identifying business and information processes, evaluating IT investment, IT strategy, benchmarking, IT spending, DCF, outsourcing, knowledge management, managing change, crowd-sourcing, evaluating new technologies

<b>7.4 Finance for Strategic Managers</b>	
<b>Aims</b>	To develop financial skills required to understand and analyse financial information and to manage finance at a strategic level within a business. To understand the different business structures and financial reporting requirements.
<b>Unit Level</b>	7
<b>Unit Code</b>	Y/503/5095
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. Learners will need to demonstrate their full understanding of the use of financial information in business decision making. Learners can use their own experience or provide examples of businesses from their research to exemplify the points which are made. Learners will need to access and interpret published business accounts.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Understand the role of financial information in business strategy	1.1 Assess the need for financial information in business 1.2 Identify the risks related to financial and business decisions 1.3 Summarise financial information required in strategic business decision making
2. Be able to analyse published financial statements for strategic decision making purposes	2.1 Explain the purpose, structure and content of published accounts 2.2 Interpret financial information in published accounts 2.3 Calculate financial ratios from published accounts to support strategic business decision-making
3. Understand how businesses assess and finance non-current assets, investments and working capital	3.1 Differentiate between long and short-term finance requirements for businesses 3.2 Compare the sources of long and short-term finance for businesses 3.3 Assess the importance of managing cash flow and examine cash flow management techniques 3.4 Evaluate methods for appraising strategic capital or investment projects
4. Understand different ownership structures and how they influence and measure financial performance	4.1 Analyse the corporate governance, legal and regulatory requirements of different business ownership structures 4.2 Compare and contrast the accountability for and roles of owners and managers in decision

	making for different business ownership structures
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## Indicative Content

### 1. Understand the role of financial information in business strategy

#### Need for financial information

- Assessing finance requirements, obtaining finance, reporting to owners/ shareholders/ stakeholders, setting and meeting targets, appraising new projects, managing risk, internal versus external need

#### Business risks

- Strategic and market, compliance, operational, risk modelling

#### Financial information

- Profitability, cash flow, business value, financial stability, costs projections

### 2. Be able to analyse published financial statements for strategic decision making purposes

#### Published accounts

- Purpose of published accounts – provide information to shareholders/stakeholders; users of published accounts – e.g. shareholders, potential shareholders, managers, employees, lenders, creditors, suppliers, customers, community, competitors; annual reports (including main financial statements, director's report, audit report, notes to accounts etc.); main financial statements (statements of financial position, income statements, sources and statements of cash flows); internal management accounts versus published financial accounts; structure of statements - content, requirements; weaknesses of published accounts

#### Interpretation

- Comparisons between years, comparisons between companies, industry comparisons, benchmarking, reasons for using ratios; difference between capital and revenue expenditure (definitions, decision making, treatment in financial statements)

#### Ratios and how to interpret them

- Profitability, liquidity, efficiency, capital, investor, limitations of ratio analysis

### 3. Understand how businesses assess and finance non-current assets, investments and working capital

#### Long and short-term finance

- Definitions of long-term and short-term, the importance of matching finance to project

#### Sources of finance

- Range of sources, external and internal sources, role of markets and government, long-term and short-term, advantages and disadvantages of each source, implications of each source for financial statements e.g. gearing

#### Cash flow management

- Cash flow forecasts, managing inventory, trade payables, trade receivables etc., budgetary control processes – budgets and variances – how to interpret them and investigate differences

#### Investment appraisal techniques

- Net present value, discounted cash flows, internal rate of return, payback, accounting rate of return, cost benefit analysis, value for money

### **4. Understand different ownership structures and how they influence and measure financial performance**

#### Ownership structures

- Sole trader, partnership, limited company, public limited company; other less-used forms: charities, limited by guarantee, co-operatives, public sector organisations; international equivalents, financial implications (share structures, availability of finance); legal requirements: company law, business law; accounting standards and corporate social responsibility

#### Accountability and roles

- Stakeholder interests, control issues, shareholder versus sole trader, manager and owner, decision making interests, organisation strategy

<b>7.5 Research for Senior Managers</b>	
<b>Aims</b>	To develop the skills required to carry out strategic level research on a particular issue and analyse and report the results of the research.
<b>Unit Level</b>	7
<b>Unit Code</b>	F/503/5091
<b>GLH</b>	60
<b>Credit Value</b>	25
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. In order to achieve this unit learners must carry out a comprehensive piece of research on a chosen strategic area. Learners will need to carefully select a topic for research and may require guidance from the tutor to ensure that it is sufficiently strategic and the relevant information is available.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Be able to develop an appropriate research question for a business research project	1.1 Identify a suitable area of research 1.2 Explain the aim, scope and objectives of the project 1.3 Establish success criteria for the research 1.4 Develop a detailed research question 1.5 Justify the choice of research question
2. Be able to develop a research proposal	2.1 Evaluate research techniques to assess their suitability for the project 2.2 Select suitable research techniques 2.3 Develop a detailed research proposal
3. Be able to undertake a literature review	3.1 Identify sources of information and literature relevant to the research question 3.2 Critically review literature to inform the development of the research proposal or the research project 3.3 Record and report literature review in an appropriate format for the project
4. Be able to use data and information collection and analysis techniques	4.1 Collect and analyse data and information to inform research 4.2 Synthesise data and information to support results and conclusions of research
5. Be able to present research with conclusions and make recommendations based on research carried out	5.1 Summarise findings of research project 5.2 Draw conclusions and identify any recommendations from research findings 5.3 Present research in a suitable format



## **Indicative Content**

### **1. Be able to develop an appropriate research question for a business research project**

#### Research areas

- Parameters for choice (what is required, what is possible), given terms of reference/hypothesis, relevance and suitability of chosen area, areas of interest, accessibility of information, subjects of research

#### Aims, scope and objectives

- Feasibility of research, achievability of aims and objectives; scope of project – reducing scope if required; resource implications, consultancy projects

#### Success criteria

- Measuring success, breaking project down into stages and separate objectives, monitoring the project, application of theory, writing success criteria, value

#### Research question

- Definition, format of question, developing a suitable question, copyright and plagiarism issues

#### Justification

- Give reasons for choice, assess relevance of choice, link choice to given parameters and terms of reference

### **2. Be able to develop a research proposal**

#### Research techniques

- Primary and secondary research techniques; confidentiality of data; quantitative research techniques (data collection, statistical analysis, trends and forecasts from data, electronic analysis, presentation of quantitative data in graphs, charts etc., recording quantitative data); qualitative research techniques (interviewing, bias in qualitative data, focus groups, interpretation, recording qualitative data, analysing qualitative data)

#### Selection

- Matching techniques to project, identifying likely data to be required, choosing suitable mix of techniques, cost and accessibility considerations

#### Proposal

- Contents (question, methodology, timelines, success criteria, initial literature review, justification, how the project meets required parameters); format – suitable for project, audience

### **3. Be able to undertake a literature review**

#### Sources

- Books, journals, papers, conferences, libraries, web research, Government information, other published research, media; indicators of credibility of sources, checking credibility of sources, gaining access, checking copyright

#### Review of literature

- Credibility of literature, validity and reliability, acceptance of conclusions, relevance for research

#### Recording and reporting

- Suitable formats for recording and reporting, references (styles and details), bibliographies

### **4. Be able to use data and information collection and analysis techniques**

#### Collecting and analysing data and information

- Planning collection of data and information – different methods; data collection and recording including reliability and validity; capturing qualitative data (e.g. audio/video recording); analysis techniques – use of statistics, analysing qualitative data

#### Synthesising data

- Consideration of evidence to support or contradict research question; identify themes and conclusions; ethical issues

### **5. Be able to present research with conclusions and make recommendations based on research carried out**

#### Summarise findings

- Present findings in suitable format – narrative, tables, graphs etc.; identify key and supporting information; organise information to include in main report and appendices

#### Conclusions and recommendations

- Draw conclusions from findings and identify any recommendations to be made

#### Present research

- Suitable formats – written, oral, audio, video presentations; organisation of information/different report structures; report summary including executive summaries; presenting to different audiences

<b>6.1 Human Resource Management</b>	
<b>Aims</b>	To develop skills and knowledge in the field of human resource management strategy. To look at contemporary issues which affect human resource strategy within organisations.
<b>Unit Level</b>	6
<b>Unit Code</b>	L/503/5093
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. Learners will approach this unit from a theoretical perspective but examples from organisations will be required to illustrate the work. This is particularly the case for LO3 where the learner will need to relate their work to a particular organisation.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Understand the role and importance of human resource management in achieving organisational effectiveness	1.1 Define strategic human resource management 1.2 Explain the importance of human resource management in organisations 1.3 Analyse the framework of strategic human resource management
2. Understand the formulation and implementation of human resource strategies	2.1 Analyse the strategic human resource process 2.2 Assess the roles in strategic human resource management 2.3 Analyse the development and implementation of human resource strategies
3. Be able to assess a range of HR strategies that may be implemented within an organisation	3.1 Identify a range of HR strategies for an organisation 3.2 Assess HR strategies and their application in an organisation
4. Understand contemporary issues affecting strategic human resource management	4.1 Identify contemporary issues affecting strategic human resource management 4.2 Analyse contemporary issues affecting strategic human resource management

## Indicative Content

### 1. Understand the role and importance of human resource management in achieving organisational effectiveness

#### Definitions

- Definitions and models of strategic HR management (e.g. contingency model, best practice model, Harvard Framework, Ulrich's model, control based, resources based etc.); fundamentals and characteristics of strategic HR management; types of strategies (e.g. personnel, generalist, outsourced, centres of excellence etc.); approaches to strategy, criteria for successful strategy

#### Importance

- Legal requirements, contribution to the organisation; fit with corporate strategy; human capital management; improving organisational performance through strategic HR management; alignment of HR, corporate strategy

#### Framework (e.g. Harvard model)

- Stakeholder interests (shareholders, managers, employees, employee organisations, government), situational factors (characteristics of workforce, business strategy, organisational culture, labour market, social context); HR policy choices (employee influence, work systems, reward systems); outcomes and consequences of choices

### 2. Understand the formulation and implementation of human resource strategies

#### Process

- Setting strategic direction, long term versus short term, organisational design, audits, designing the management system, planning total workforce/demand forecasting, generating required human resource, developing people and performance/reward management systems, assessing organisational competence and performance/development strategies

#### Roles

- Role of top management/Board of Directors, stakeholders, strategic HR role of front-line management, HR Function, HR specialists/consultants

#### Development and implementation

- Conducting a strategic review, setting out the strategic HR plan, implementing HR strategies

### 3. Be able to assess a range of HR strategies that may be implemented within an organisation

#### Range of strategies

- Strategies for improving organisational performance (organisational, development, transformation, culture management, knowledge management, developing trust, reward); talent management; succession planning; resourcing strategies (HR planning, flexibility, retention, talent management etc.); learning and development strategies (learning culture, learning, organisation, organisational learning strategies, individual learning); performance management (definition and purpose, scope,

process, approaches); reward strategy (purpose, characteristics, structure, developing the strategy, effective strategies, impact on management); employee relations strategy (issues, background, HR approach, policies, partnership agreements, employee voice strategies)

#### Application

- How strategies apply in different organisations; measuring success of strategies; fit with organisational strategy, culture and mission

#### **4. Understand contemporary issues affecting strategic human resource management**

Contemporary issues should be identified and analysed to assess their impact on human resource management. Content here may change as issues change and can be contextualised to suit learner's own country, organisation and environment.

Examples of topics include:

- Internationalism and challenges for strategic HR management; diversity management and equal opportunities; downsizing and its strategic implications; legal; globalisation; culture/equality and diversity; work life balance; communication/IT

<b>6.2 Project Management</b>	
<b>Aims</b>	To understand the process of identifying appropriate and feasible projects, and to be able to initiate and start a project. To be able to manage, monitor and control a project, including assessing, managing and controlling project risks and issues, project and team management and change management. To be able to evaluate the success or failure of a project.
<b>Unit Level</b>	6
<b>Unit Code</b>	J/503/5111
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	Learners should plan and manage a real business project where possible. Where they do not have access to an appropriate business environment, they may use a project in an alternative environment, for example a building project on their home or a voluntary project with a local community group. Learners may require guidance on selecting a project which can be carried out within the time available for completing the unit.
<b>Learning Outcomes. The learner will:</b>	<b>Assessment Criteria. The learner can:</b>
1. Be able to analyse business objectives to identify feasible projects	1.1 Identify projects required from an appraisal of established business objectives 1.2 Produce project sub-divisions and high-level estimates of time, resources and costs 1.3 Evaluate a project methodology suitable for the specific project 1.4 Assess the feasibility of a proposed project
2. Be able to design systems and plans for initiating managing and controlling projects	2.1 Devise a structure for the management and administration of the project 2.2 Define the roles and responsibilities of the project manager 2.3 Prepare a detailed project plan
3. Be able to organise and manage a project	3.1 Assess alternative project team structures 3.2 Demonstrate the interpersonal skills required for effective project management 3.3 Design quality management processes to be used in a project 3.4 Design procedures for managing project change proposals
4. Be able to monitor and control the progress of projects	4.1 Identify issues and risks that may impede a project 4.2 Design systems for monitoring and appraising the status of a project 4.3 Design control systems to detect and manage issues arising in the course of projects

5. Be able to review, evaluate and closeout a project	5.1 Identify issues and risks likely to be encountered in the final stages of a project. 5.2 Assess the necessary project tasks to be completed in the final stages of a project
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## **Indicative Content**

### **1. Be able to analyse business objectives to identify feasible projects**

#### Project initiation

- Analysing business needs, reviewing operations and procedures, alternative project cost-benefit analyses

#### Project sub-division

- Work breakdown, identifying time scales, identifying resources, project budgeting, reporting and accountability

#### Outline project methodology

- Review of project and decide between appropriate models for project management e.g. traditional approach, PRINCE2, critical change approach, event change approach

#### Feasibility

- Risk management: identifying risk, impact analysis, risk management/planning, review of cost-benefit and risk equation for projects. Consideration of other issues impacting on project e.g. issues of globalisation (advantages and disadvantages of cross-country/culture projects)

### **2. Be able to design systems and plans for initiating, managing and controlling projects**

#### Evaluate project management framework

- Traditional approach, critical change approach, event change approach or proprietary/formalised approaches e.g. PRINCE

#### Role of Project Manager

- Managing team and stakeholders, setting schedule, budget and timing, developing the project plan, managing project risks and interfaces with other projects, managing conflicts

#### Project plan

- Value proposition, sponsorship, accountability, deliverables, responsibilities, resource allocations, timeline, milestones, critical path

### **3. Be able to organise and manage a project**

#### Team structures

- Hierarchical, virtual, networked, functional team, pure project teams, matrix management

#### Interpersonal skills

- Leadership, e.g. motivating others, delegation, and decision-making. Networking, e.g. network building and communication skills, teamwork, e.g. collaboration, mentoring



## Quality

- Status and plan documentation and regular monitoring meetings, defining responsibilities and accountability, communications, traceability and audit trails, formalised frameworks and stages

## Change control

- Formal change requests, review of critical path/ impact on resources and timelines, authorisation processes

## **4. Be able to monitor and control the progress of projects**

### Issues and risks

- Project creep, gaps in the scope or accountability of the project, changing dependencies (other projects, business conditions etc.), delays, (technology, decisions, resource availability etc.), planning errors, skills or other resource deficits

### Project monitoring

- Status and plan documentation and regular monitoring meetings, defining responsibilities and accountability, communications, traceability, formalised frameworks and stages

### Project conflict resolution

- Role of Project Manager and Sponsor, constructive versus destructive conflicts, compromise, skill complements, goal congruence

## **5. Be able to review, evaluate and closeout a project**

### Project closeout risks

- Lack of ownership, communication failures, 'meaningless' plan without buy-in, no accountability, lack of employee empowerment

### Project closeout

- Formal evaluation of project and team performance, document learning points for future, assess success factors, post-implementation report, sign off on deliverables, hand over / archive documentation, contract closures, closing out financial accounts, reassign team

<b>7.6 Programme Leadership</b>	
<b>Aims</b>	To develop the skills to be able to plan and lead a programme of related projects and critically evaluate the programme.
<b>Unit Level</b>	7
<b>Unit Code</b>	Y/503/5226
<b>GLH</b>	40
<b>Credit Value</b>	10
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. In order to achieve this unit learners should lead a programme of related projects in an organisation. The work may be undertaken through the learners' employment or through voluntary work.
<b>Learning Outcomes The learner will:</b>	<b>Assessment Criteria The learner can:</b>
1. Be able to plan and agree a programme of related projects that support the strategic plans of an organisation	1.1 Analyse business strategy to identify programme objectives and benefits 1.2 Negotiate with identified stakeholders to establish a range of projects to deliver programme benefits 1.3 Plan and agree programme with programme management group
2. Be able to lead a programme of related projects	2.1 Lead the co-ordination of projects within a programme 2.2 Manage programme resources to achieve project and programme objectives 2.3 Review and monitor projects and address any issues that arise 2.4 Report programme progress and results to stakeholders 2.5 Close down projects and programme
3. Be able to evaluate a programme of related projects	3.1 Assess the success of projects with project managers 3.2 Review the success of the programme in delivering benefits and meeting objectives 3.3 Analyse areas for future improvement in programme management and leadership

## Indicative Content

### 1. Be able to plan and agree a programme of related projects that support the strategic plans of an organisation

#### Identifying programmes

- Definitions of projects and programmes and differences between them, the importance of analysing strategy, vision, goals of organisation, how projects and programmes help deliver business strategy/ growth, identifying suitable programmes, programme objectives, benefits of programmes

#### Establishing the programme

- Role and responsibilities of the programme leader, negotiation skills, identifying stakeholders, defining projects from programme objectives

#### Planning and agreeing programme

- Scope of programme and individual projects, resources: budgets, human resources, physical resources, timescales; accountability and responsibilities for programme and projects, co-ordination of projects, roles of the management team, programme leader, project manager and stakeholders etc., constraints on programme, contingency plans, documentation of programme and projects

#### Project planning

- Project plans, activities within projects, briefing project managers, making managers accountable, reporting structures and timescales

### 2. Be able to lead a programme of related projects

#### Co-ordination

- Leadership and management skills, communication structures and skills – with project teams, programme management team, stakeholders; monitoring programme progress and co-ordinating different elements, critical path analysis

#### Resources

- Resource management: people, finances, physical resources, time; co-ordination of resources, managing resource constraints/limitations

#### Review and monitoring

- Designing monitoring systems, regular review, identifying issues, dealing with issues eg. resource issues, timing issues etc.; conflict resolution, re-negotiating goals/re-defining projects to ensure programme success

#### Stakeholder reporting

- Stakeholder involvement – timing, frequency, methods of involving stakeholders (eg. face to face or written), maintaining dialogue with stakeholders, reporting to stakeholders – timing, frequency and format

### **3. Be able to evaluate a programme of related projects**

#### Project evaluation

- Project evaluation techniques, appraisal and performance reviews, evaluating projects against objectives, evaluating projects against programme objectives, evaluation of programme management and control, identifying development areas for project managers, feedback from project team, managers and stakeholders, giving feedback to team, managers and stakeholders

#### Programme evaluation

- Evaluation against programme objectives, evaluation of own programme leadership skills – reflecting on own performance, obtaining and using feedback

#### Future improvements

- Analysing feedback for areas to improve, identifying training and development for project and programme teams, sharing knowledge and learning from project with organisation

<b>6.3 Economics for Business</b>	
<b>Aims</b>	To provide an economic context for business and business behaviour and develop the knowledge and understanding needed to analyse the macro and micro economic environments.
<b>Unit Level</b>	6
<b>Unit Code</b>	M/503/5118
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. Learners will approach their work from a theoretical perspective and will need to use exemplar material to illustrate the points which are made. This may be taken from their own experience or from research.
<b>Learning Outcomes The learner will:</b>	<b>Assessment Criteria The learner can:</b>
1. Understand the micro-economic business environment	1.1 Explain the importance of the micro-economic environment to business organisations 1.2 Analyse business objectives and business behaviour in the economic context 1.3 Analyse the impact of market structures on business organisations
2. Understand the macro-economic environment in the domestic context	2.1 Explain determinants of national income 2.2 Explain the impact of government policies on the economy 2.3 Analyse the impact of the macro-economic environment on business organisations
3. Understand the implications of operating in the international economic environment on business organisations	3.1 Analyse features of the international economic environment 3.2 Analyse the economic implications for business of operating in a global business environment

## **Indicative Content**

### **1. Understand the micro-economic business environment**

#### Importance of micro-economic environment

- Definition of micro and macroeconomics, supply and demand – price elasticity, total, average and marginal revenue; factors of production, diminishing returns, limited resources, price determination, changes in market price and quantity

#### Business objectives and behaviour

- Maximising objectives, non-maximising objectives, ethics and profit, purpose of organisations, corporate governance, business behaviour, product life cycle, size of organisations, structure of organisations – sole trader, partnership, company; mergers and public interest

#### Market structures

- Perfect competition, monopoly, monopolistic competition, oligopoly, labour and factor markets (UK/EU labour market regulation), market failure, market regulation, competition

### **2. Understand the macro-economic business environment**

#### National income

- Definitions, measurement and issues, data sources and reliability, equilibrium and circular flow, multiplier, inflation and deflation

#### Government impact

- Fiscal policy, monetary policy, tax, expenditure, aggregate demand and supply, supply side policies, inflation, unemployment, balance of payments, economic growth

#### Environment

- SWOT and PESTLE analysis, political, technological, environmental, legal social/cultural

### **3. Understand the implications of operating in the international environment on business organisations**

#### International environment

- Multinational operations, international environment and exchange rates; areas: EU, North America, East and South East Asia; free trade and protectionism, trade agreements, international organisations – World Trade Organisations, World Bank etc.; global monetary systems

#### Implications

- Coping with local competition, operating in emerging economies, understanding different economic systems, global competition and strategic foreign exchange issues, global collaboration, issues of sustainability

<b>6.4 Risk Management</b>	
<b>Aims</b>	To raise business risk awareness and develop knowledge and understanding in the assessment, monitoring and control of business risks. To enable the learner to develop an appreciation of the implications of business risks.
<b>Unit Level</b>	6
<b>Unit Code</b>	H/503/5097
<b>GLH</b>	40
<b>Credit Value</b>	10
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. Learners will approach their work from a theoretical perspective and will need to use exemplar material to illustrate the points which are made. This may be taken from their own experience or from research.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Understand the risk management function in business	1.1 Examine the role of the risk management function in business 1.2 Assess the role of business function in the management of risk
2. Understand how business risk is assessed and managed	2.1 Analyse the risk assessment process 2.2 Evaluate approaches to managing risk 2.3 Examine the risk management process
3. Understand the effects of business risks and how they can be managed	3.1 Analyse the main drivers of business risk 3.2 Appraise the impact of different types of risk for a business organisation 3.3 Assess which business areas are high risk 3.4 Analyse risk management strategies
4. Understand approaches to crisis management and business continuity planning	4.1 Analyse the vulnerability of businesses to breaks in continuity 4.2 Critically evaluate approaches to crisis management and business continuity planning

## **Indicative Content**

### **1. Understand the risk management function in business**

#### Role of risk management

- Purpose of risk management – why risks need to be managed, identifying risks, review of activities and internal environment, setting objectives, risk assessment (impact and likelihood), risk response plans, control and monitoring

#### Functions that have a role in managing risk

- Strategic planning, marketing, compliance, operations, legal and accounting, insurance, treasury/accounting, management and quality assurance, internal audit, health and safety, environmental

### **2. Understand how business risk is assessed and managed**

#### Risk assessment

- Analysis, identification, description, estimation control measures, evaluation and review

#### Risk management frameworks

- ERM programmes, COSO, ISO 3001, corporate governance/compliance, actuarial approaches, insurance, legal issues

#### Risk management process

- Risk assessment, risk reporting, decisions, risk treatment, residual risk reporting, monitoring – ongoing and formal audit, modification

### **3. Understand the effects of business risks and how they can be managed**

#### Drivers

- Strategic risks (e.g. competition, changes in society or markets), financial risks (e.g. liquidity, foreign exchange, credit risk), operational risks (e.g. product failure), hazard risks (e.g. natural disasters), information risks (e.g. computer hacking)

Operations: Identifying risks in business operations (as above)

#### High risk areas

- Data, systems integrity, reputation, financial theft

#### Risk management strategies

- Employment practices, fraud prevention measures, health and safety policy, protection of physical assets and business continuity, process and product management, benchmarking, disaster management

### **4. Understand approaches to crisis management and business continuity planning**

#### Vulnerability

- Factors – size of business, operating environment, physical environment etc.
- Impacts – loss of profits, loss of assets, inability to trade



## Approaches

- Business continuity planning, impact assessment, threat assessment, scenario definition, recovery solution design (including customer / stakeholder management), implementation and communication, testing, maintenance and update, crisis assessment, incident resolution – roles and actions

<b>6.5 Strategic Marketing</b>	
<b>Aims</b>	This unit enables the learner to understand how corporate strategy informs marketing strategy. It also enables the learner to understand how to carry out strategic market analysis and how to implement a marketing strategy.
<b>Unit Level</b>	6
<b>Unit Code</b>	D/503/5096
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. In this unit learners will generally use theoretical knowledge and understanding illustrating their work with examples from suitable organisations. LO4 requires learners to apply their knowledge to a specific organisation.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Understand the principles of strategic marketing	1.1 Assess the role of strategic marketing in an organisation 1.2 Analyse the relationship between corporate strategy and marketing strategy 1.3 Analyse how marketing strategy is developed
2. Understand how to carry out strategic marketing analysis	2.1 Evaluate approaches to internal environmental analysis 2.2 Evaluate approaches to external environmental analysis 2.3 Explain how internal and external analyses are integrated
3. Analyse strategic marketing decisions and choices	3.1 Analyse decisions and choices to be made at a corporate level 3.2 Assess how these decisions influence marketing at business unit and functional level 3.3 Analyse approaches to competitive positioning of organisations
4. Understand how a range of marketing strategies can be implemented to contribute to competitive advantage	4.1 Identify a range of strategies that can contribute to competitive advantage 4.2 Analyse marketing communications strategies 4.3 Analyse marketing strategies, their application and implementation for an organisation

## **Indicative Content**

### **1. Understand the principles of strategic marketing**

#### Role of marketing strategy

- Definitions of marketing strategy, its role in the organisation and how it underpins marketing planning and activities, concept of product and customer in different organisations, resources and implementation, monitoring and control

#### Corporate strategy and marketing strategy

- Corporate strategy, linking marketing strategy to corporate mission and vision, meeting corporate objectives with marketing strategy, corporate social responsibility and marketing

#### Developing a marketing strategy

- Analysis of the environment, setting objectives, dynamic strategy – flexibility for change

### **2. Understand how to carry out strategic marketing analysis**

#### Internal analysis - approaches

- Resource-based, performance, value chain, functional

#### External analysis

- Macro environment, micro environment, competitor analysis, wider external factors including Government

#### Integration

- Fit between internal and external environment

### **3. Analyse strategic marketing decisions and choices**

#### Corporate decisions

- Vision and mission of organisation, directional strategy for marketing, Porter's generic strategies/Ansoff's Matrix, identifying generic strategies for organisation and business units; how the strategy informs corporate activities

#### Business unit and functional level

- How corporate strategies translate to unit and function level, decisions to be made at unit and function level, setting objectives for unit and functional level, marketing and other functions: finance, human resources, research

#### Competitive positioning

- Marketing objectives, risk, market leader, market challenger, market follower, market niche

#### **4. Understand how a range of marketing strategies can be implemented to contribute to competitive advantage**

##### Marketing strategies

- Segmentation, targeting and positioning, relationship strategies, product innovation and development, branding, service marketing, pricing and distribution, E-marketing

##### Communications

- MARCOMS strategic process, setting objectives, media choices, the role of public relations, cost decisions, frequency, operations and measurement, international communications, implementation, organisation and control, managing competitive advantage, monitoring and evaluation

##### Application

- Applicability for organisation and environment, resources, implementation, management, implications

<b>7.7 Corporate Communication Strategies</b>	
<b>Aims</b>	To understand the importance of corporate communication and how it links to corporate objectives. To conduct an audit internal and external corporate communications, and to be able to develop an effective corporate communications strategy.
<b>Unit Level</b>	7
<b>Unit Code</b>	M/602/2086
<b>GLH</b>	30
<b>Credit Value</b>	10
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. Learners can approach LO1 from a theoretical perspective, using examples to illustrate their work. For the remainder of the unit learners will be required to actually conduct internal and external corporate communications audits and plan an appropriate communications strategy for an organisation. Learners should use an organisation they know well; where they are employed, work in a voluntary capacity or where they are currently studying.
<b>Learning Outcomes The learner will:</b>	<b>Assessment Criteria The learner can:</b>
1. Understand the importance of corporate communication	1.1 Discuss the purpose of corporate communication strategies 1.2 Assess how corporate communications link to corporate objectives 1.3 Analyse the relationship between corporate communication and corporate branding
2. Be able to conduct an internal corporate communications audit	2.1 Plan an internal corporate communications audit 2.2 Conduct an internal corporate communications audit 2.3 Critically evaluate the effectiveness of current levels of practice
3. Be able to conduct an external corporate communications audit	3.1 Plan an external corporate communications audit 3.2 Conduct an external corporate communications audit 3.3 Critically evaluate the effectiveness of current levels of practice
4. Be able to plan the development of a corporate communication strategy	4.1 Plan the objectives of a corporate communication strategy 4.2 Select audiences to influence with a corporate communications strategy 4.3 Plan appropriate measures to monitor a planned corporate communications strategy

## **Indicative Content**

### **1. Understand the importance of corporate communication**

Aims of corporate communications

- Provides information to stakeholders, communicates corporate vision and strategy, reinforces public view of the organisation, links to PR strategy

Reinforcing corporate objectives

- Communicates and reinforces strategic objectives, reinforces corporate culture, promotes accountability, prioritises stakeholder communication and influence

Reinforcing corporate branding

- Promotes brand and reinforces stakeholders' view of company performance and value(s), prevents dilution / erosion of the corporate brand and identity / links to brand management strategy

### **2. Be able to conduct an internal corporate communications audit**

Planning

- Selecting appropriate research techniques, identifying formal and informal internal information and communication flows, Identifying information and data management processes, identifying knowledge management processes

Conducting an internal audit

- Informal versus formal, e.g. water-cooler, email, conferencing and meeting; vertical versus horizontal, e.g. management communications, corporate newsletters, departmental, interdepartmental and team meetings; control of information and data, processing data

Evaluating effectiveness

- Benchmarking, questionnaires, focus groups, participant, observation/ethnography, surveys and interviews

### **3. Be able to conduct an external corporate communications audit**

Planning

- Selecting appropriate research techniques, identifying external information and communication flows, identifying information channels and barriers, identifying communication risks

Conducting an external audit

- Supplier and customer communications, e.g. networking, conferences, partnerships and JVs; public communications, e.g. marketing and advertising, news items and online e.g. web-pages, forums, social media such as Twitter, Facebook, Tumblr etc., institutional relationships (including professional, government and industry bodies, universities and communities); knowledge development and management e.g. supply chain integration, crowd sourcing, collaboration

Evaluating effectiveness

Surveys and interviews, questionnaires, focus groups, participant observation/ ethnography, processing research

#### **4. Be able to plan the development of a corporate communication strategy**

Strategic objectives

- Strategy formulation, implementation, measurement and monitoring of strategic aims

Audience analysis

- Stakeholder analysis, international / cultural issues, evaluating communication channels (in respect of stakeholder groups)

Monitoring, review and feedback

- Developing communication and stakeholder engagement plan, surveys, focus groups and interviews, measuring communication outcomes, monitoring online customer interaction, quantitative and qualitative measures, measuring ROI

<b>7.8 Manage Continuous Organisational Improvement</b>	
<b>Aims</b>	To develop the knowledge and skills required to create a culture of continuous improvement and to plan change for improvement within an organisation.
<b>Unit Level</b>	7
<b>Unit Code</b>	T/503/5203
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. In this unit learners can approach LO1 from a theoretical perspective, using examples to illustrate their work. For the remainder of the unit learners will be required to actually consider and plan change within an organisation. In order to meet the standards learners should use an organisation they know well; where they are employed, work in a voluntary capacity or where they are currently studying.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Understand how to create a culture of continuous improvement	1.1 Analyse features of organisations that encourage and allow continuous improvement 1.2 Analyse leadership and management styles that facilitate continuous improvement 1.3 Analyse features of the learning organisation 1.4 Analyse approaches to introduce and embed change within an organisation 1.5 Analyse approaches to quality improvement
2. Be able to analyse opportunities for improvement to organisational activities	2.1 Assess sources of information likely to identify opportunities for improvement 2.2 Analyse information to identify areas for improvement 2.3 Assess the impact of proposed changes to organisational activities 2.4 Evaluate proposed changes to organisational activities
3. Be able to plan and lead change within an organisation	3.1 Determine changes required to introduce improvements to organisational activities 3.2 Agree proposed changes with stakeholders 3.3 Produce a plan for the proposed changes and communicate to stakeholders 3.4 Design systems and procedures to support the changes 3.5 Review the change process for an organisation



## Indicative Content

### 1. Understand how to create a culture of continuous improvement

#### Organisational features

- Culture including equality issues, type of organisation e.g. co-operatives; structure, encouraging input from employees, communication structures (two-way communication), communication with all stakeholders, role of Government/legal requirements, research and development

#### Leadership and management styles

- Encouraging discussion and consultation, consultative management styles, leadership style, supporting communication – team meetings, discussion groups, receiving suggestions etc., acceptance of risk

#### Learning organisations

- Cross organisational and collaborative working, team working and learning, seeking feedback; shared values, goals, beliefs, strategy; learning incorporated into practice, encouragement of new ideas, information systems to support learning and knowledge management, investment in staff development

#### Approaches to change

- Top down/bottom up, Kotter and Schlesinger – education and communication, participation and involvement, facilitation and support, negotiation and agreement, manipulation and co-option, implicit and explicit coercion, incremental and transformational change, use of external standards e.g. ISO 14000 and ISO 9001

#### Quality

- Total quality management, Kaizen, PDCA, continuous quality improvement, including six sigma, benchmarking, quality circles, 5Ss, SPC

### 2. Be able to analyse opportunities for improvement to organisational activities

#### Sources of information

- Environmental audits – political, legal, economic, social, technological, environmental (PESTLE analysis); organisational analysis – strengths and weaknesses in organisation; internal management accounts/standard costing; quality management, monitoring of organisational activities and suggestion schemes, benchmarking, external audits, feedback from stakeholders including appraisals/PDR, complaints

#### Analysing information

- Evaluating information e.g. source of information, how widespread is a specific problem, systemic errors versus one-off errors, use of external consultants, criteria to select areas for improvement

#### Impact

- Strategic fit, what will need to change within the organisation e.g. systems, people, procedures, resources etc.; timescales of change, resources required implementing change and investment analysis

#### Evaluation

- Stakeholders - who will improvement/change affect? How will it affect stakeholders?  
Cost benefit analysis

### **3. Be able to plan and lead change within an organisation**

#### Changes required

- Resources, leadership and management abilities, job roles and responsibilities, equipment, procedures, activities, culture

#### Agree Changes

- Identifying stakeholders – those involved in change and those affected by change; communication with stakeholders – appropriate format, feedback processes, negotiation, PR; gaining agreement – negotiation skills, formal agreement requirements

#### Plan

- Project planning and project management techniques including PRINCE2, documentation, communication, setting criteria to monitor and measure improvement, timescales

#### Systems design management

- Resources, documentation, communication, policies and procedures

#### Review the change/improvement process

- Importance of monitoring, using feedback, performance measurement

<b>7.9 Sustainable Business Strategy</b>	
<b>Aims</b>	To raise awareness of sustainable development issues and how they impact on the strategic development of the business.
<b>Unit Level</b>	7
<b>Unit code</b>	F/503/5141
<b>GLH</b>	40
<b>Credit Value</b>	10
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. This unit cannot be approached from a theoretical perspective with information gathered solely from public sources. In order to achieve the Learning Outcomes for the unit, the learner work must be produced for a specific organisation. This must be an organisation the learner knows well and ideally it should be an SME. Learners will require guidance in selecting a suitable organisation.
<b>Learning Outcomes The learner will:</b>	<b>Assessment Criteria The learner can:</b>
1. Understand the global sustainability agenda	1.1 Analyse the global sustainability agenda and how it translates into national practice 1.2 Analyse the forces for change in the sustainable business environment 1.3 Evaluate the impact of current sustainability issues on business organisations
2. Understand the concept of the sustainable business organisation	2.1 Determine the extended boundaries of the sustainable business organisation 2.2 Evaluate the impact on business structure and objectives of becoming a sustainable business organisation
3. Understand sustainable strategic planning	3.1 Determine change required within business organisations to meet the sustainability agenda 3.2 Analyse the concept of the triple bottom line and how it is implemented in business organisations 3.3 Review the process of sustainable strategic business planning

## **Indicative Content**

### **1. Understand the global sustainability agenda**

#### Sustainability agenda

- Concept of sustainability and why it is important; current agenda e.g. Agenda 21, the earth summits on global sustainability issues; current issues e.g. climate change, social inequality, energy issues, ecological footprints, population growth, droughts, fair trade; national responses to sustainability issues – legal frameworks, guidance to business and target setting (national and corporate)

#### Forces for change

- Economic, social/cultural/religious/ environmental/scientific, implications of change, and analytical techniques to understand change

#### Impact of current sustainability issues

- Social attitudes to sustainability in business, consumer interests, legal and regulatory framework around sustainable business, impact on profitability and other business objectives

### **2. Understand the concept of the sustainable business organisation**

#### Extended boundaries

- How sustainability issues extend the boundaries of the enterprise; consideration of those external to organisation e.g. suppliers, manufacturers, communities, government, international bodies; consideration of whole supply-chain and whole life-cycle for products, services and organisation

#### Impacts

- Changes in management and leadership, new techniques and considerations e.g. supply chain management, consumers; risks and impacts for shareholders and managers, monitoring and evaluation of performance in wider sustainable enterprise, conflicts between corporate and sustainability objectives

### **3. Understand sustainable strategic planning**

#### Change

- Cultural change, role of Government (national and international), new management and leadership skills, new vision and strategic approach, managing changes required

#### Triple bottom line

- Concept of triple bottom line (people, planet and profit), stakeholders versus shareholders, managing the triple bottom line, measurement of triple bottom line, conflict between sustainability and business objectives

#### Sustainable strategic planning

- Identifying sustainable strategic objectives and financial return, negotiating agreement to sustainable objectives, resolving conflicts between sustainability and corporate needs, management of sustainable strategic planning

<b>7.10 Strategic Planning</b>	
<b>Aims</b>	Exploring the skills and competencies necessary to develop an organisational strategic plan.
<b>Unit Level</b>	7
<b>Unit Code</b>	H/602/2330
<b>GLH</b>	45
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	N/A
<b>Learning Outcomes</b> The learner will:	<b>Assessment Criteria</b> The learner can:
1. Understand the external environment affecting an organisation	1.1 Explain the importance of external factors affecting an organisation 1.2 Analyse the needs and expectations of stakeholders of an organisation 1.3 Analyse the major changes taking place in the external environment that will affect strategy
2. Be able to review existing business plans and strategies of an organisation	2.1 Use appropriate tools to analyse the effects of current business plans 2.2 Review the position of an organisation in its current market 2.3 Evaluate the competitive strengths and weaknesses of an organisation's current business strategies
3. Be able to develop options for strategic planning for an organisation	3.1 Use modelling tools to develop strategic options for an organisation 3.2 Develop a comparative understanding of activity from organisations in the market 3.3 Create options to form the basis of future organisational strategy
4. Be able to construct a strategy plan for an organisation	4.1 Propose a suitable structure for a strategy plan that ensures appropriate participation from all stakeholders of an organisation 4.2 Develop criteria for reviewing potential options for a strategy plan 4.3 Construct an agreed strategy plan that includes resource implications
5. Be able to examine factors affecting an organisational strategy plan	5.1 Compare core organisational values (ethical, cultural, environmental, social and business) with the current business objectives of an organisation 5.2 Develop appropriate vision and mission statements for an organisation 5.3 Produce agreed future management objectives for an organisation

	5.4 Develop measures for evaluating a strategy plan
6. Be able to plan for the implementation of a strategy plan	6.1 Develop a schedule for implementing a strategy plan in an organisation 6.2 Create appropriate dissemination processes to gain commitment from stakeholders in an organisation 6.3 Design monitoring and evaluation systems for the implementation of a strategy plan in an organisation

## **Indicative Content**

### **1. Understand the external environment affecting an organisation**

#### External factors

- Stakeholders, competitive environment, PESTLE

#### Stakeholder expectations

- Customer expectations, supply chain relationship, market and investor expectations

#### Changes

- Socio-political and legal changes, technological change and development, product development, analysis tools: TESTLE, SWOT, customer analysis, competitor analysis

### **2. Be able to review existing business plans and strategies of an organisation**

#### Tools

- Value Chain analysis, SWOT analysis, Five Forces

#### Market position

- Market share analysis, life cycle analysis, Boston (BCG) Matrix

#### Competitiveness

- SWOT analysis, resource analysis, competitive analysis, skills and competencies audit, benchmarking

### **3. Be able to develop options for strategic planning for an organisation**

#### Modelling tools

- Mintzberg, Ansoff, gap analysis, competitiveness strategies

#### Competitiveness analysis

- Benchmarking, portfolio analysis, market segmentation

#### Strategic options

- Corporate expansion, mergers and acquisitions, niche marketing, diversification, control of distribution channels, efficiency in production, technological leadership, market share

### **4. Be able to construct a strategy plan for an organisation**

#### Structure

- Mission statement /corporate vision, corporate values and principles, SWOT analysis, competitive advantage, strategic goals / initiatives, strategy, scorecard, execution plan

#### Assessment criteria

- Balanced scorecard, targets / interim targets / goals, success metrics

#### Resources

- Resources, skills and competencies, roles, action plans, responsibilities and accountability

### **5. Be able to examine factors affecting an organisational strategy plan**

#### Organisational values

- Corporate culture, corporate / brand image, organisational structure and staffing, operational abilities, market share, resources, patents and IP, corporate experience, contracts, licences and relationships

#### Vision and mission statement

- Purpose of vision and mission statements, vision in relation to corporate values, vision statement audience (internal and external), mission statement goals and objectives, mission statement key success measures

#### Management objectives setting

- Areas: financial, marketing, products/services, operations, resources, environment and community; ethical framework / CSR, smart objectives and success criteria

#### Evaluating the plan

- Monitoring, responsibilities / accountability for monitoring, strategic changes /deviation, frequency of monitoring

### **6. Be able to plan for the implementation of a strategy plan**

#### Implementation plan

- Establish plan with end user buy-in, establish tracking system, align budget, align departmental plans to strategy

#### Stakeholder buy-in

- User participation in strategy process, tie departmental plans into strategic plan, align performance management and reward systems to strategy implementation

#### Monitoring and evaluation

- Monthly strategy planning meetings, annual review meetings, role of celebration

#### Issues

- Lack of ownership, communication failures, 'meaningless' plan without buy-in, no accountability, lack of employee empowerment.



<b>6.6 Managing Quality and Service Delivery</b>	
<b>Aims</b>	This unit aims to introduce the learner to the delivery of excellent customer service. The learner will also develop knowledge and understanding required for quality measurement and management of service delivery (for public service or healthcare management programmes the unit can be delivered in context).
<b>Unit Level</b>	6
<b>Unit Code</b>	F/503/5351
<b>GLH</b>	40
<b>Credit Value</b>	10
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. Learners can approach this unit theoretically across the sectors or in the specific content of public service or healthcare. Their work must be illustrated from the learner's own experience or research.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Understand how to identify and meet stakeholder needs in service delivery	1.1 Identify stakeholder groups and their expectations for service delivery 1.2 Assess the impact of poor service quality for the organisation and stakeholders 1.3 Analyse how stakeholder needs are met
2. Understand how to manage quality of service delivery	2.1 Analyse the concepts of quality and quality standards in relation to service delivery 2.2 Evaluate approaches to quality management in service delivery 2.3 Explain how quality standards are set and monitored
3. Understand how to promote continuous improvement of service delivery	3.1 Analyse the concept of continuous improvement in service delivery 3.2 Evaluate the need for continuous improvement in service delivery 3.3 Explain how continuous improvement can be implemented

## **Indicative Content**

### **1. Understand how to identify and meet stakeholder needs in service delivery**

#### Identification of different stakeholder groups

- External customers, internal customers, other stakeholder groups including employees, perceptions, expectations and needs and how to be aware of them

#### Impact of poor service

- Organisation reputation, meeting organisational strategic aims, accountabilities e.g. public sector - stakeholders, Government; private sector - shareholders, lenders; meeting standards, impact on stakeholders e.g. healthcare impacts of failure in delivering healthcare services, impact on bottom line

#### Meeting stakeholder needs

- Balancing needs of different stakeholder groups, delivering and measuring excellent service, setting service standards and Service Level Agreements, importance of managing and monitoring service delivery, how to manage and record service delivery, customer driven management

### **2. Understand how to manage quality of service delivery**

#### Quality and quality standards

- Defining quality, dimensions of quality for service delivery, quality systems, ISO9000/9001, other quality systems e.g. IIP

#### Quality management

- Total quality management, implementing standards, excellence model, theories of quality – Deming, Juran, Crosby, quality strategies in service delivery, developing a quality led organisation, involving staff in quality management, roles in quality management

#### Setting and monitoring standards

- How standards are set, implementing ISO9000/9001, auditing quality feedback mechanisms e.g. questionnaires, good practice in standard setting, methods for evaluating quality and service delivery

### **3. Understand how to promote continuous improvement of service delivery**

#### Concept of continuous improvement

- Concept of continuous improvement, history in manufacturing and application to service delivery, theories and techniques (e.g. Kaizen, total quality management, lean management, Deming cycle, benchmarking, Pareto analysis, force field analysis etc.)

#### Need for continuous improvement

- Continuous improvement to meet stakeholder needs, perceptions, expectations; investment in staff and resources, value for money, best practice

## Implementation

- Encouraging staff involvement and rewarding it, competence standards implementing change in organisation, managing and monitoring continuous improvement, performance management

<b>6.7 Personal Leadership and Management Development</b>	
<b>Aims</b>	This unit aims to enable the learner to develop own personal leadership and management skills to support the achievement of own and organisational objectives.
<b>Unit Level</b>	6
<b>Unit Code</b>	A/503/5350
<b>GLH</b>	40
<b>Credit Value</b>	10
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	To achieve this unit, learners must achieve the learning outcomes and meet the standards specified by the assessment criteria for the unit. Additional assessment guidance is provided on the ATHE sample assignment brief. To achieve the standards for this unit, learners will be required to identify their own skills development needs for leadership and management based on real evidence. Learners must actually apply the plan which is produced so they may need an extended time to carry out this assignment.
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Be able to analyse personal leadership and management skills to support achievement of organisational objectives	1.1 Analyse the impact of organisational objectives, values and culture on the leadership and management role 1.2 Evaluate the leadership and management skills required to support achievement of organisational objectives 1.3 Assess personal leadership and management skills and identify personal development required to support achievement of organisational objectives
2. Be able to manage development of personal leadership and management skills to support achievement of organisational objectives	2.1 Assess opportunities for development of leadership and management skills 2.2 Construct a personal development plan to develop leadership and management skills 2.3 Manage personal development of leadership and management skills
3. Be able to evaluate the effectiveness of personal development plans to develop management and leadership skills	3.1 Review personal development plan against original objectives 3.2 Evaluate the effectiveness of personal development of leadership and management skills 3.3 Analyse areas for further development and update personal development plan

## Indicative Content

### 1. Be able to analyse personal leadership and management skills to support achievement of organisational objectives

#### Organisational objectives

- Different organisational visions and aims e.g. financial, customer focused, product focused etc.; stakeholder requirements e.g. profitability, ethical operation, legal compliance; strategic plans, accountability of leaders and managers for organisational objectives, impact of organisational type, purpose, values and culture on leadership and management roles, the wider environment requirements affecting organisation

#### Leadership and management skills

- Leadership and management characteristics, skills, competence and knowledge required, behaviours, attitudes associated with effective leadership

#### Personal skills

- Skills audit, role of appraisals/PDR, use of feedback

### 2. Be able to manage development of personal leadership and management skills to support achievement of organisational objectives

#### Development opportunities

- Coaching, mentoring, networking, professional bodies and professional recognition, formal training, education opportunities, formal qualifications, reflective learning models and techniques (e.g. deep and surface learning, ACT, learning transfer, double loop learning, activity theory) feedback – obtaining, evaluating and using feedback

#### Personal development plans

- Contents of plans – activities, timescales, aims and objectives, writing objectives

#### Personal development

- Continual review and reflection, learning from activities, using feedback on activities, recording achievement, sharing with others

### 3. Be able to evaluate the effectiveness of personal development plans to develop management and leadership skills

#### Review

- Review of original objectives, review of achievement against original objectives, competences and results, importance of review, identifying objectives not yet achieved

#### Evaluation

- Measuring and evaluating effectiveness, benchmarking with others, identifying activities that were not effective, areas needing further development

#### Further development

- Further development needs and opportunities, building on success, updating plans, the importance of continuous development and reflection

<b>7.11 Developing Organisational Vision and Strategic Direction</b>	
<b>Aims</b>	To develop skills and knowledge to develop a vision and direction for an organisation or division within an organisation. The unit is particularly useful for leadership in public service organisations and links with the NHS leadership framework.
<b>Unit Level</b>	7
<b>Unit Code</b>	R/503/5211
<b>GLH</b>	60
<b>Credit Value</b>	15
<b>Unit Grading Structure</b>	Pass
<b>Assessment Guidance</b>	Assessment should be based around an organisation or a division within an organisation
<b>Learning Outcomes</b> <b>The learner will:</b>	<b>Assessment Criteria</b> <b>The learner can:</b>
1. Understand how to develop a vision for an organisation	1.1. Assess the role of key stakeholders in relation to the vision 1.2. Analyse factors that will impact on the organisation and its vision 1.3. Create a vision for an organisation 1.4. Determine the strategic direction for the organisation
2. Understand how to communicate the vision to stakeholders	2.1. Analyse methods to communicate the vision to engage and inspire others within the organisation 2.2 Assess how to build support for the vision within the organisation 2.3 Assess ways of communicating the vision to external stakeholders
3. Understand how to implement the vision and strategic direction within the organisation	3.1 Analyse leadership behaviour to promote the vision within the organisation 3.2 Assess how the vision can be embedded within the organisation 3.3 Translate the vision into organisational objectives to set the strategic direction 3.4 Outline the strategic planning process for an organisation

## **Indicative Content**

### **1. Understand how to develop a vision for an organisation**

#### Stakeholders

- Identify different organisations and their structure; identify who stakeholders are – employees, managers, service users, customers, funding bodies, general public, Government (should customers/users be first?), stakeholder needs and wants, stakeholder roles in organisation and activities, stakeholder mapping, methods of engaging stakeholders

#### Factors

- Political, social, environmental, economic, legal, technological factors (PESTLE), Government policy and legal requirements, regulatory and accountability factors, best practice and industry trends, global factors, gathering data on factors

#### Strategic direction

- Strategic goals, evaluating factors, criteria for analysis, using knowledge to set strategic direction, strategic planning techniques

#### Vision

- Written vision and mission statements, values and culture, language, purpose, good practice, creating a suitable vision

### **2. Understand how to communicate the vision to stakeholders**

#### Communication methods

- Understand audiences, methods – presentation, format, media; attitudes – enthusiasm, stressing importance, gaining agreement and acceptance, corporate style; communication systems, external support and expertise, embedding the vision

#### Building support

- Communicating clearly and effectively, equality issues, challenging behaviours, language, attitudes that do not support vision, negotiation skills, changing systems, procedures, models of change

#### Communicating with external stakeholders

- Promoting the vision, benefits analysis and promotion, format and language to promote, feedback mechanisms, cost benefit analysis

### **3. Understand how to implement the vision and strategic direction within the organisation**

#### Leadership behaviour

- Leadership and management styles, managing the change, acting as a role model to promote and embed the vision, challenging behaviours, attitudes, values etc. that do not support the vision, importance of personal credibility and belief



### Embedding the vision

- Models for approaching change in the organisation e.g. top down, bottom up, consultative styles etc.; identifying procedures, activities, values, language not consistent with vision and replacing them; organisational culture

### Setting strategic direction

- Links between vision and objectives, strategic objectives – format, content, writing objectives; role of stakeholders

### Strategic planning process

- Format and contents of strategic plan, development of plan, resource allocations, targets and criteria for success