Diploma in Management Consulting

Course Handbook and Learner Guide

CMI Chartered Management Institute
BLUEPRINT Education and Training Services Limited
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Welcome

Welcome to the programme and thank you for choosing to study with Blueprint Education and Training Services Limited. This handbook aims to provide you with specific details about your programme, its aims and objectives and methods of assessment, as well as some details regarding the Institute of Consulting [IC] and the Chartered Management Institute [CMI], whose partnership is responsible for your qualification.

Other information is provided such as information about policies, procedures and support mechanisms.

Additional information, including your Course Calendar (timetable) and assignments, can be found within your learning pack.

Our IC/CMI qualifications are based on a supported distance learning programme that is assessed by a variety of methods including traditional assignments.

Its aim is to enhance personal effectiveness and enable participants to transfer the knowledge and skills learnt to almost any commercial or business situation. There is a balance between academic studies and practical activities to enable the application of theory to practice.

Important Contact details [to be completed after Induction]

<table>
<thead>
<tr>
<th>Tutor name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can contact your Tutor by email on:</td>
</tr>
<tr>
<td>You can contact Blueprint Education &amp; Training Services Limited by telephoning: 0845 862 0140</td>
</tr>
<tr>
<td>You can access the CMI website at: <a href="http://www.managers.org.uk">www.managers.org.uk</a> And the IC website at: <a href="http://www.iconsulting.org.uk">http://www.iconsulting.org.uk</a></td>
</tr>
<tr>
<td>Your CMI/IC membership/candidate number</td>
</tr>
</tbody>
</table>
About the CMI

The Chartered Management Institute (CMI) is a major professional and awarding body for managers with over 90,000 members throughout the world.

Blueprint is accredited by the CMI for the promotion, administration and quality control of its management programmes. The Institute’s programmes are assessed and verified under strict and consistent quality control conditions, which means that CMI qualifications are respected nationally and internationally by public, private and education sector organisations.

Learners enrolling on a CMI programme of study with Blueprint also register with the Chartered Management Institute and become student members. This entitles you to:

- Use the Institute’s Management Information Centre - the most extensive management library resource in Europe!
- Participate in local and other branch activities
- Access a wide range of specialist management books published by the Institute
- Receive the Institute’s professional journal

About the Institute of consulting

The Institute of Consulting (IC) is the professional body for all consultants and business advisers. Created to raise standards of professional practice in support of better business performance, the Institute provides a development path for the profession, supported by high quality resources and a recognised qualification route.

Formed in April 2007 by the merger of the Institute of Business Advisers and the Institute of Management Consultancy, the Institute encompasses the entire profession of consultants and advisers with a membership touching on all areas of the UK economy.

The qualifications designed to support both aspiring and experienced consultants are awarded through the Chartered Management Institute, as part of a working relationship between both organisations.

Student Membership Institute

Student members are supported in their courses by access to the best information available on management topics across all disciplines. Those studying for qualifications awarded by the Institute through Blueprint are automatically made student members when they are registered.

As a student member you will be able to take advantage of the many support services including the Management Information Centre. The library
alone contains more than 30,000 books and 40,000 articles on management. You will have access to recommended reading lists, free book loans and an online international database providing full text versions of core management journals.

**The student area groups together pertinent additional resources for each unit of study - a valuable additional resource. You should review this before starting each assignment.**

The online Continuing Professional Development scheme is set up to identify and focus on learning and knowledge improvements. You will have immediate access to this and can use it to monitor your progress and achievements. Subsequently, you could use it as the first step on the route to Certified Management Consultant- the hallmark of the professional consultant.

In addition, the Institute offers a range of opportunities for networking with other members through 90 local branches, 17 Women in Management groups and other online special interest networks. Whether exchanging ideas or learning from the experiences of others, such opportunities can prove invaluable.

You will also receive the CMI journal, Professional Manager, delivered to your door and many other additional benefits such as free legal advice, discounted language and IT courses, access to research findings, and even discounts on insurance and travel!

A full range of services can be accessed at www.iconsulting.org.uk

You will be sent details of how to access the services and your username and login as soon as we have registered you with the Institute.
The full range of management consulting qualifications

Three qualifications are available at each level of study: the Award Certificate, and Diploma.

The difference between these options is the number of units you study and pass. Each unit is given a “credit value”, and for each qualification there is a minimum number of “credits” to achieve. So you can choose the size of qualification that is just right for you. Later you can add more units and “upgrade” your qualification until you obtain the Diploma.

Apart from the Diploma options where certain units are mandatory, it is possible to have a relatively free choice over the units you wish to study. We have selected the most popular units for our standard courses, but if you would like to choose different units please contact us.

All Awards, Certificates and Diplomas are awarded by the Institute of Consulting and Chartered Management Institute jointly on successful completion of the assessment programme and presentation of an electronic portfolio of evidence to the CMI.

There are two main levels of management qualifications awarded by the Chartered Management Institute. At each level you can study for an Award Certificate or Diploma:

<table>
<thead>
<tr>
<th></th>
<th>6 credits</th>
<th>13 credits</th>
<th>42 credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 5 Professional Consulting (degree level)</td>
<td>Award</td>
<td>Certificate</td>
<td>Diploma</td>
</tr>
<tr>
<td></td>
<td>7 credits</td>
<td>13 credits</td>
<td>43 credits</td>
</tr>
<tr>
<td>Level 7 Professional Consulting (post graduate)</td>
<td>Award</td>
<td>Certificate</td>
<td>Diploma</td>
</tr>
<tr>
<td></td>
<td>6 credits</td>
<td>13 credits</td>
<td>52 credits</td>
</tr>
</tbody>
</table>
The level 7 Professional Consulting qualifications

Who is this programme level for?

The Level 7 programme has been developed for those seeking to enter management consultancy having gained significant expertise in their own functional area or senior/middle management; and experienced practitioners who now want to develop their skills to lead a consultancy intervention and to work closely with clients to achieve organisational change.

This consultancy qualification is suitable for a wide variety of participants including

- Existing internal or external consultants
- Experienced Managers wishing to extend their range and develop their consultancy skills
- Experienced functional specialists seeking to expand their remit and consulting activities
- Seasoned project managers operating in a total business context
- Middle and Senior managers seeking a career change
- Suitable individuals wishing to boost their CV and demonstrate their abilities

Prospective candidates require:

- 3+ years middle management experience or 3+ years specialist functional experience
- Sound knowledge of business world - private or public sector
- Good understanding of management concepts and theories - ideally a management qualification at level 5/degree
- Good standard of business English.
- A degree level or equivalent education

Qualifications available at Level 7

Three qualifications are available at this level: the Award Certificate, and Diploma. The difference between these three options is the number of units you study and pass. Each unit is given a “credit value”, and for each qualification there is a minimum number of “credits” to achieve. So you can choose the size of qualification that is just right for you. Later you can add more units and “upgrade” your qualification until you obtain the Diploma.

Apart from the Diploma where certain units are mandatory, it is possible to have a free choice of the units you wish to study as long as they are on the permitted list for the qualification. We have selected the most popular units for our standard courses, but if you would like to choose different units please contact us before you enrol.
Our courses are delivered through highly supportive distance learning using a combination of personal tutor support and access to i-cademy our online learning portal. On enrolment you will gain instant access to i-cademy where you will find all your learning materials and other study resources available for viewing and download.

You will also be allocated a personal tutor who will guide you through your course, undertake telephone tutorials and assess all of your course assignments.

You will need a PC, Laptop or Notebook with sound, internet access, and meet minimum browser requirements of: Firefox 4+, Internet Explorer 8, Safari 5, Google Chrome 11, or Opera 9. You will need to disable pop-up blockers and enable cookies.

If you would prefer not to use our online portal and use traditional distance learning with physical workbooks and learning materials please let us know as we can provide this.

**The Award (6 credits minimum)**

This short Award is a great kick-start to any career in consulting, or a short skills improver for the more experienced practitioner. Content includes: Planning and managing the consultancy intervention, the consulting cycle, understanding consultancy models and approaches, identifying the main risks to success and strategies to overcome them. One written assignment is undertaken.

Unit 7030 Managing consultancy interventions

Study method: Distance Learning  
Tuition support period max: 3 months  
Price: £950

**The Certificate (13 credits minimum)**

Sufficient credits can be achieved to obtain the Certificate by completing just two units. However we understand that many practitioners are seeking a more rounded development experience so we have two options: a two unit Certificate or a three unit Certificate. Assessment is by one written assignment per unit.

In both Certificate options unit 7030 will be studied together with a choice of either one or two additional units from the permitted list.
**Certificate Option 1 – two units**  
Core unit: Unit 7030 Managing consultancy interventions  
Option units: One from: 7026, 7027, 7028, 7029, 7031  
Study method: Distance Learning  
Price: £1500  
Tuition support period max: 4 months

**Certificate Option 2 – three units**  
Core unit: Unit 7030 Managing consultancy interventions  
Option units: Two from: 7026, 7027, 7028, 7029, 7031  
Study method: Distance Learning  
Price: £2000  
Tuition support period max: 6 months

**The Diploma (52 credits minimum)**

To achieve the Diploma a minimum of 52 credits are required. Thirty two credits come from the mandatory units. The remaining twenty credits are achieved by selecting three units from the optional choice list. Assessment is by one written assignment per unit.

Core units: 7026, 7027, 7030, 7031  
Option units: Three from 7028, 7024, 7025, 7029, 7002, 7006, 7009, 7010  
Study method: Distance Learning  
Price: £3200  
Tuition support period max: 12 months

Full details of units and rules of combination and our courses are overleaf.
The following table shows the units within the programme range and the rules relating to unit choices for all three qualifications.

**Key**
- ✓ = Available for Award and Certificate
- M = Mandatory units for Diploma
- O = Optional unit choices for Diploma only. Choose three to value of 20 credits

<table>
<thead>
<tr>
<th>Unit</th>
<th>Title</th>
<th>Credit</th>
<th>Award</th>
<th>Certificate</th>
<th>Diploma</th>
</tr>
</thead>
<tbody>
<tr>
<td>7030</td>
<td>Managing consultancy interventions</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>M</td>
</tr>
<tr>
<td></td>
<td>Content includes: Explores different models and approaches for managing consulting interventions together with individual consulting style, the consulting cycle, identifying the main risks to success and strategies to overcome these.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7027</td>
<td>Entry and diagnosis</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>M</td>
</tr>
<tr>
<td></td>
<td>Content includes: examines the initial entry and diagnosis stage of the consulting cycle, how to develop a positive client relationship, identify client needs and produce an effective proposal.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7026</td>
<td>Organisational structure and culture</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>M</td>
</tr>
<tr>
<td></td>
<td>Content includes: explores organisational culture and structure, their impact upon the client organisation, diagnostic tools, techniques and models to support the work of the consultant.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7031</td>
<td>Tools and techniques for effective consulting</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>M</td>
</tr>
<tr>
<td></td>
<td>Content includes: understanding of a wide range of tools of analysis used for effective problem diagnosis, situation analysis, problem solving and decision making and how to use them in a structured way in various stages of the consulting cycle</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7028</td>
<td>Group dynamics and facilitating skills</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: discusses the impact of group dynamics, leading groups and teams, strategies for developing and maintaining productive working relationships, managing group dynamics and the role of facilitation within consulting.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7029</td>
<td>Communication strategies for consulting</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: explore how to create effective communication strategies, deploy effective communication skills to build relationships and communicate effectively with clients.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7032*</td>
<td>Managing the business of consulting</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: Explores different models and approaches for managing consulting interventions together with individual consulting style, the consulting cycle, identifying the main risks to success and strategies to overcome these</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7024</td>
<td>Professional practice</td>
<td></td>
<td>X</td>
<td>X</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: understanding the professional and ethical standards to which consultants should work, codes of conduct, confidentiality, and dealing with ethical dilemmas.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7025</td>
<td>Professional development in consulting</td>
<td></td>
<td>X</td>
<td>X</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: examines the importance of professional development in the consulting environment, the Consulting Competency Framework, managing own CPD, the development of own team and development of clients employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7002</td>
<td>Strategic performance management</td>
<td></td>
<td>X</td>
<td>X</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: examining the performance of organisations and strategic business units, effective business planning and target setting, managing business unit performance, organisational politics, delegation and influencing skills.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7006</td>
<td>Organisational direction</td>
<td></td>
<td>X</td>
<td>X</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: reviewing the client’s organisational strategic aims and objectives, creating corporate strategies, the strategic planning process, situational analysis and strategic options modelling.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7009</td>
<td>Strategic project management</td>
<td></td>
<td>X</td>
<td>X</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: strategic project planning, working with project sponsors and stakeholders, project planning, gaining agreement to implementation managing and handing over the project.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7010</td>
<td>Organisational change</td>
<td></td>
<td>X</td>
<td>X</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: understanding change models, tools and techniques, developing strategies for change, evaluating the impact of change strategies.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7020*</td>
<td>Leadership coaching and mentoring skills</td>
<td></td>
<td>X</td>
<td>X</td>
<td>O</td>
</tr>
<tr>
<td></td>
<td>Content includes: developing skills and practices that support coaching and mentoring. You will learn about ethical issues, the creation of coaching and mentoring plans and how to overcome resistance.</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

* Units 7032 and 7020 are not offered by Blueprint Education and Training Services Limited.
Course Basics

Course Content

Details of the syllabus content for your programme can be found at the back of this Handbook. The syllabus gives a breakdown of each unit.

More importantly, the learning outcomes and assessment criterion for each unit are shown, and these are the key outcomes that you must demonstrate in your assignments to be successful.

Induction

Shortly after you have received your learning pack, your tutor will contact you to give you a brief induction into the programme. They will confirm the details of your course, how it will be assessed and develop your personal timetable using the Course Calendar.

If at anytime you do not understand anything or need to ask a question, please call Blueprint on 0845 862 0140 and we will help you.

Course Calendar

You are provided with a course calendar which you may use to make a note of deadlines you have agreed with your tutor, and to track your progress.

Tutor support

You will be allocated a tutor who will be your personal guide, mentor and coach. They will be an expert in their field and distance learning. You can be confident that their support and help will give you every opportunity to be successful.

Your tutor will support you in a proactive way. They will contact you shortly after your enrolment has been processed and will agree your own personal timetable with you. We know that life sometimes gets in the way so if you need to change it, you simply contact your tutor.

They will explain how and when you can contact them, and there are no restrictions on how often you can do this, although you should remember that your tuition fees cover a specified period of time. E.g. 12 months for the Diploma. Your tutor will confirm this period with you during your induction.

They will also initiate contact with you to check your progress and provide support and motivation. They may also agree times for a telephone or internet tutorial session.
Your personal tutor will also assess the work you have to submit for your qualification. They will provide you with full written feedback.

As well as support from your tutor, you will be able to contact our learner services department at any time. Call 0845 862 0140.

**Course length**

Each course has a typical length of time students take to complete. The duration of tutor support periods reflect this average completion time. The expected completion time and expiration of your tutor support period will be contained in a letter accompanying your learning pack.

If you exceed the tutorial support period we reserve the right to charge further tuition fees which will be based on the amount of the course you have left to complete.

Typically support periods are:

- **Award**: 3 months
- **Certificate**: 4 or 6 months
- **Diploma**: 12 months

We do recognise that sometimes other demands may make it difficult to stick to your original timetable so we will be as flexible as we can. In the event of a **significant event** preventing you from studying you course, you can negotiate a break from your course with your tutor, who will then extend the support period accordingly. This **MUST** be negotiated and approved with your tutor at the time of the event. It cannot be done retrospectively.

**Additional reading and research**

Although the course workbooks are sufficient for most people to learn and understand core concepts, there is an expectation that you will undertake some additional reading and research for each unit.

Generally, a review of the additional Institute resources for each unit will be sufficient. These can be found in the study area within the member resource area of the Institute's website.

The Institute also produce a reading list of interesting books for your programme should you wish to extend your reading even further. This is available on their website.

Many of the books and journals listed can be obtained through your local library or the CMI Library free of charge. If your employer is sponsoring you through the programme, they may be able to help with the cost of buying your own
copies. You can also speak to your Tutor who will recommend those sources that you will find most useful during your studies.

**Programme Director and Tutor roles**

The Programme Director is responsible for the overall management of the programmes, recruitment to the courses, maintaining administration and record systems and generally ensuring that the requirements of the internal quality assurance processes and CMI are met.

Your Tutor has overall responsibility for monitoring your academic progress and supporting you to achieve your agreed learning programme. Your Tutor is normally also the assessor for the programme and will guide you through the assessment process, mark your work and give you feedback on what you have done well and where there might be scope for improvement.

We hope you will have an uneventful time with us, but should you have a difficulty which prevents you from successfully completing your studies with us, you should contact your Tutor to discuss this. There is space to write your Tutor contact details elsewhere in this Handbook or you may use the office number **0845 862 0140**.

**Workplace mentors**

Early on in your studies it may be useful to identify someone in your organisation, normally in a higher position than you, who has some understanding about competence-based management development. Your HR department, if you have one, may help you with this.

Having a Mentor can be a very beneficial part of the learning process and we encourage you to have one to support you through your qualification. It is important that you can communicate easily with your mentor and that you keep him or her up-to-date with your studies.

You can ask a mentor to comment on your work before submission (NOT to do it for you or assess it!).

When choosing your Mentor the following points should be borne in mind

- the Mentor should be asked and be willing to take on the role
- the Mentor should be willing to allocate time to discuss your studies with you on a regular basis
- the Mentor should have the skills to offer advice, counsel and support
- to avoid conflicts of role, the Mentor should preferably not be your direct line manager
Assignments

A series of work-based assignments will be set throughout the programme (one per unit) which are designed to test your knowledge and understanding from each of the units. In some modules this may take the form of a case study, although generally these will be work-based assignments designed to enable you to put your learning into practice. All assignments can be found in the back of the workbook for the unit and on the i-cademy portal.

Each assignment will be issued with accompanying briefing sheets containing the details for the specific piece of work, and information regarding the Task, Learning Outcomes, Assessment Strategy, Grading Criteria and Assignment Submission Date.

The assignments have a word limit, excluding appendices, which must be adhered to.

All assignments must contain a bibliography/resource list and all sources must be quoted and acknowledged. Blueprint takes a firm line on plagiarism and when you submit your work for assessment, you should be sure that it is all your own work.

When you submit your assignments, you will be asked to use assignment submission forms and you will be asked to sign an Authenticity Statement. Your work will not be marked until all the documentation has been correctly completed and signed including the reflective statement.

Formatting rules

We do not have rules about:

- Font style
- Font size
- Margin sizes
- Spacing

We do have rules about:

- Document creation
- Word count
- Referencing and bibliographies
- Appendices
- Submission forms

These are discussed below in more detail.
**Document creation**

Please use Microsoft Word or Works to prepare your work. If you are using other software please contact your tutor before submission.

Each assignment should be submitted as **one single electronic document**. There should not be a separate document for each task or appendix. Where spreadsheets have been used cut and paste these into the main document.

The following must appear on **EVERY page** of your assignment:

- Your name
- Unit number
- Page number

You can use the header or footer function to do this.

You must also:

- Have a **heading for each question** – e.g. Question 1, Question 2, etc.
- Put your **word count** at the end of your answers
- Put your **bibliography** after you word count
- Put **appendices** after bibliography

**Referencing and bibliography**

It's vital to include accurate references and a bibliography with your assignments. This will help you and others to find the source of your ideas and avoids any possibility that you will be accused of plagiarism.

You may use any of the accepted forms of referencing, as long as you apply it consistently. We prefer that you use the **Harvard** author/date system of referencing.

**In the text of your assignment** put the author's name and the date of his or her publication in brackets.

You MUST have a **bibliography** at the end of the assignment with all references in alphabetical order.

This is not a complex or difficult as it may seem. Look at how this is done in your workbooks.

You can find more helpful information and examples in the plagiarism guide in the appendices of this handbook.
Appendices

You can make use of appendices where these are essential to support key aspects of your answer. Appendices must be used sparingly.

Appendices are intended to be supporting cast, not main actors. Your assignment answer should be a complete story in its own right. Ideally, the body of your assignment should be a complete work and will usually contain all tables and diagrams within the main body text.

When used, appendices must be referred to in the body of the text and the key meaning or message from the appendix must be discussed within the assignment body text.

For example:

“the detailed SWOT analysis in Appendix B shows that the three most important weaknesses facing .......”

Appendices should only be used when:

- The incorporation of the material in the body of the work would make it poorly structured or too long and detailed.
- Helpful, supporting or essential material would otherwise clutter, break up or be distracting to the text.

Examples of acceptable appendices would include:

- The creation of an essential assignment required sub-document e.g. your own personal development plan,
- A detailed worked application of a model such as STEEPLE, SWOT etc,
- A detailed analysis such as a budget, NPV or other calculations essential to prove a case or argument.

Examples of unacceptable appendices include:

- Copies of strategic plans or similar corporate documents,
- Copies of policies or procedures,
- Copies of example forms or documents ,
- Pages copied from reports, books or websites,
- Copies of instructions, memos or reports you have written to your team or manager.

Copying documents such as policies in whole or part does not demonstrate your understanding or evaluation of them, merely that you are able to use “cut and paste” functions. This is not an assessment requirement.
Where an assignment question specifically asks you to describe policies, procedures or their use, you are expected to do this within the text of the assignment in your own words so that you show you understand the policy or procedure and how it works. You could even use flow diagrams to do this.

Where an assignment question specifically asks you to review policies, procedures or their application, you are expected to do this within the text of the assignment in the form of a discussion that may contain a brief summary of the policy but will primarily focus on evaluating the policy, for example: whether it is lawful, represents good practice, is based on relevant concepts and theories, is implemented, does what it sets out to do, etc. In these circumstances just copying the policy and referring your tutor to it does not demonstrate either understanding or evaluation.

Remember also that your assignment is to be submitted as one single word document. This means appendices must be incorporated into the assignment document. They should appear at the back of the document, ideally between the word count and the bibliography.

Where you have created the appendix in separate software, Excel for example, you will need to cut and paste this into the word document.

If your appendix needs to be landscape, you can change the orientation of a single page within a document by using section breaks rather than page breaks.

If you have concerns about a specific appendix ask your tutor.

**Assignment submission form**

**No assignment will be assessed UNLESS IT IS ACCOMPANIED BY THE ASSIGNMENT SUBMISSION FORM consisting of:**

1. Assessor Feedback sheet with the relevant parts completed by you. This will be used to record assessment decisions.

2. Statement of Authenticity for each assessed piece of work to confirm that you know, have understood and adhered to the regulations regarding plagiarism.

3. Reflective Summary of the assignment MUST be written, stating what has been learned from doing the assignment and the relevance of the skills developed. Identify any difficulties you had with the assignment – e.g., the topic may be outside your normal role requirements.

4. Mentor’s report. If you have a workplace mentor you may ask them to comment on your assignment and progress. This is not compulsory.

   **An example of the forms is at the back of this handbook.**
   **Your tutor will provide you with an electronic version**
Submitting your assignment

You will need to submit your assignments to your tutor electronically by email.

You must comply with the following conditions:

- Email subject line must state: Assignment submission

- The assignment should be submitted as one complete document. There should not be a separate document for each task or appendix. Where spreadsheets have been used please try to cut and paste these into the main document.

- Please use Microsoft Word or Works to prepare your work. If you are using other software please contact your tutor before submission.

- Completed electronic versions of the submission form must also be attached to the email.

If you need to handwrite and post your assignment discuss this with your tutor. We recommend that posted assignments are sent by recorded delivery.

Deadline Extensions

It is expected that you will submit all assessed work on the date agreed with your Tutor. However, we recognise that sometimes problems or situations occur which prevent this from happening.

You may negotiate an extended deadline if you experience difficulties. This MUST be agreed with the Tutor concerned before the original deadline, and the Tutor must be notified in writing [email is fine].

Please remember that you may need to pay a tuition renewal fee if you exceed the tuition support period for the course.
Assignment assessment and grading

All assessed work on the IC/CMI programmes can only be graded Pass or Refer. Clear guidelines on what constitutes a Pass will accompany each assignment.

For each assignment we will tell you up front how it will be marked and assessed. You will find a table that gives you the assessment and learning outcomes that you must meet.

For example:

A table showing the learning outcomes and their related assessment criterion is reproduced below.

<table>
<thead>
<tr>
<th>Title:</th>
<th>Personal development as a strategic asset</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit aim:</td>
<td>This unit is about the leader operating effectively at a strategic level.</td>
</tr>
<tr>
<td>Learning outcomes</td>
<td>Assessment criteria</td>
</tr>
<tr>
<td><strong>The learner will:</strong></td>
<td><strong>The learner can:</strong></td>
</tr>
<tr>
<td>1. Be able to identify personal skills to achieve strategic ambitions</td>
<td>1.1 Analyse the strategic direction of the organisation</td>
</tr>
<tr>
<td>2. Be able to manage personal leadership development to support achievement of strategic ambitions</td>
<td>2.1 Discuss the opportunities to support leadership development</td>
</tr>
<tr>
<td>3. Be able to evaluate the effectiveness of the leadership development plan</td>
<td>3.1 Assess against leadership objectives</td>
</tr>
<tr>
<td>4. Be able to promote a healthy and safe environment that supports a culture of quality</td>
<td>4.1 Assess the impact of corporate and individual health and safety responsibilities on the organisation</td>
</tr>
</tbody>
</table>

Each learning outcome also has assessment criteria, which provide more detail on what is expected to achieve the learning outcome. These must be covered in full - 100%.

Don’t treat the assessment criteria as a stand-alone list. They belong to the learning outcome which gives them their context.

Separately, you will see the assignment tasks. These are the questions that you must answer for your assignment.
Assignment tasks

Format
You may use an essay style of writing for your tasks. Clearly identify the tasks your work relates to. Use diagrams and appendices as required. You should not exceed 3500 words excluding any diagrams and appendices.

Tasks
1. Undertake a skills gap analysis of your organisation by identifying and mapping gaps in your skills, knowledge, and experience requirements:
   a. Identify your organisation's strategic objectives, possible future strategic direction as well as your own ambitions for the future.
   b. Identify the skills, knowledge and experience required to achieve these.
   c. Benchmark your current levels of skills, knowledge and experience in these areas.
   d. Summarise the priorities for development.

2. Create a personal development plan, one. You should show evidence of how your personal development plan is being implemented and explained to support your development as an effective manager and leader.

You will also find a grid that will tell you which learning outcome will be used to mark which task. It will also draw your attention to the course content that you should think about when planning your answer to the task. For example:

<table>
<thead>
<tr>
<th>Task no:</th>
<th>LO no:</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1.1</td>
<td>Organisation values, mission, objectives; core senior management skills; personal strategic performance requirements; career goals; STEEPLE; skills gap analysis; benchmarking.</td>
</tr>
<tr>
<td>2</td>
<td>2.1</td>
<td>Learning styles; development activities; SMART objective setting; deadlines.</td>
</tr>
<tr>
<td>3</td>
<td>3.1</td>
<td>Formal monitoring process; reviewing impact; adjusting plans.</td>
</tr>
<tr>
<td>4</td>
<td>4.1</td>
<td>Benefits of health and safety responsibilities; legislation; quality</td>
</tr>
</tbody>
</table>
Work which does not meet the standard

The first time your tutor reviews your assignment they MAY decide to treat it as a draft if there are only minor omissions or errors that need attending to. In this case they will give you feedback highlighting these issues. You can attend to these and resubmit your work. This will be regarded as your first formal submission.

If your formal submission does not achieve a Pass standard, you will be allowed to resubmit your assignment up to a maximum of two more times. If after resubmitting your assignment twice it still does not achieve a pass then it is standard practice to withdraw you, or to transfer you to a more suitable course.

End of course portfolio

All of your assessed assignments build into a portfolio of evidence that you have completed your course. When you have finished your course we will ask you to complete an overall course development record, after which we will compile an electronic portfolio. This will then be checked by our Internal Verifier.

Once checked by our Internal Verifier your electronic portfolio will be uploaded to the Institute who will undertake their own quality assurance checks. Once this is done, and they have approved your portfolio a certificate will be issued.
Quality and policies

Programme Review

We hold regular reviews of the programme through formal team meetings. If you wish to provide formal comments and feedback to the Course Team on study issues, please let your Tutor know or indeed you may discuss these with either your Tutor or our Director of Quality and Standards as they arise.

Blueprint also asks for feedback from all our learners on an individual basis via our Review and Evaluation questionnaires which you will be asked to complete at the end of your programme. These are a valuable source of information on how our learners perceive us and our courses. Please take the time to complete and return them to us so that we know where to improve on what we currently do.

Quality Checks

From time to time the Institute also contact students to ask them for their opinions and how their programmes can be improved.

The Institute also reviews samples of work from every learners electronic portfolio in a process known as moderation. In this way you can be assured that standards are maintained and that your certificate is one of worth.

If the Institute is satisfied with your work a certificate is issued. If not you may be asked to make some improvements to your work.

Internal Quality Checks

In addition, Blueprint has a well established Internal Verification (IV) procedure to monitor the standard of assessment. Your Tutor will notify you when your work should be submitted to the IV.

Once the work has been checked, you will receive it back. Normally you can expect that the IV will agree with your Tutor’s assessment decision. However, this is not always the case and the IV’s decision may over-rule your Tutor’s. If the IV requires additional work to be submitted, your Tutor will explain this to you and negotiate a suitable date for its completion.

Prior Achievement

Blueprint recognises that some of our learners will start programmes with us and discover that they have already covered some of the areas to be studied either on a previous qualification or through extensive previous experience.

Where this occurs you should ask your Tutor about our Accreditation of Prior Experience or Learning [APEL] process. This is a unique way of ensuring that
you will not have to prove your ability in a particular area if you already have sufficient proof of your capabilities to the same standard as the award you are taking with us. The Institute has strict rules about how this process works, but we will be out of provide guidance in this respect.

**Appeals and Complaints**

We hope that you will enjoy your studies with Blueprint and that everything will go smoothly for you. However, in rare circumstances you may not be entirely satisfied with some aspect of our service.

Blueprint have a published Appeals and Complaints procedure and you can obtain a full copy plus all relevant forms by contacting Lesley Smith, Director of Quality & Standards.

In the event of a complaint or appeal, Blueprint encourages all learners to speak to their Tutor in the first instance. If no satisfactory resolution can be found, then the Appeals procedure contained in the policy document should be used.

This procedure is designed to deal with disagreements that arise from assessment of learners work relating to their course of study. Appeals against assessment must be based on the grounds of unfair application of assessment or grading criteria. For example, any appeal on the grounds of a clash of personalities between the tutor and the learner should be resolved through the complaints procedure and NOT the Appeals procedure.

It would be appropriate, however, for a learner to use the Appeals procedure where they believe that the tutor has not fairly applied the published assessment criteria or learning outcomes for a particular programme or qualification and their grade has suffered as a result.

**Procedure**

**Stage 1**

A learner who has an assessment appeal should raise the issue with their tutor. If the issue cannot be resolved informally, the remainder of the procedure is followed.

The learner completes section 1 of the Learner Assessment Appeal form and passes this to their tutor. The tutor considers the learner’s issue and provides a response within 5 working days by undertaking a re-evaluation of the learner’s work and

- confirming the original assessment, providing a clear written explanation of the assessment decision and identifying any opportunity for resubmission/re-test,
- or
- making an amendment to the learner’s assessment record
The tutor completes section 2 of the Learner Assessment Appeal form, which should then be sent to the Director of Quality and Standards to hold on file. If the learner agrees with this no further action is taken.

**Stage 2**

If the learner is not satisfied with the decision they must write to the Director of Quality and Standards, setting out their grounds for appeal, within 5 working days of receiving the written decision in stage 1.

The Director of Quality and Standards will convene and chair a working group to consider the appeal. This will consist of:

- Team Leader for programme area
- One other tutor [or 2 where no Team Leader exists]
- An Internal Verifier

To aid their considerations, the working party may interview the learner or tutor as it sees fit.

The working party will consider the issues raised by the learner and within 10 working days either:

- confirm the original assessment/mark, or
- amend the learner’s assessment record

The Director of Quality and Standards will communicate this decision in writing to the learner within 5 working days of the working group’s decision. The decision of the working group will be final.

It is not appropriate to use this appeals procedure where learners wish to appeal against decisions of external awarding bodies. In such cases the awarding body appeals procedure should be used by the learner.

**CMI Appeals Procedure**

In the first instance, you must follow the Blueprint appeals and complaints procedure. Only when this route has been exhausted can you appeal to the Chartered Management Institute.

You may make an appeal regarding decisions on the following grounds:

- discrimination of any sort
- dissatisfaction over assessment decisions
- dissatisfaction over quality of tuition
In all cases, appeals must be submitted, in writing, to the Quality Auditor at the CMI. This will be acknowledged, investigated and you will receive a report on the findings within 28 working days.

A full version of this Appeals Procedure may be obtained from the Director of Quality & Standards at Blueprint on (0845) 862 0140

**Academic terms and conditions**

You are undertaking an academic course of study leading to a qualification. As such you are required to meet certain minimum standards and obligations.

Failing to meet those standards and obligations can result in your removal from the programme. Refunds of course fees are not made in these circumstances. Please see our general terms and conditions for information about our refunds policy.

**Your obligations**

You are required to comply with your obligations under these conditions and to:

1. Participate in agreed telephone tutorials arranged by your tutor
2. Submit course work and assignments within the deadlines agreed between you and your tutor
3. Submit course work and assignments in the manner requested by your tutor or as determined in relevant course material such as the Learner Handbook or Assignment Instructions
4. Submit course work at the standard required, work that does not meet the standard will be treated in accordance with the rules of the awarding body. Where work continues not to meet the required standard you may be withdrawn from the programme or, at our discretion, offered an alternative programme.
5. Not commit acts of plagiarism and to reference your work using appropriate citations
6. Submit course work and assignments that are your own work and does not include in part or whole work completed by any other person
7. Respond to requests for information from your tutor
8. Comply with professional standards required by the awarding body or professional institute for your course of study e.g. Chartered Management Institutes code of conduct
9. Notify us of any change in circumstances or contact details within 14 days
General Terms and conditions

1. All prices are in Pounds Sterling. We reserve the right to change any advertised price before you place an order.

2. All products and services are subject to availability and may be withdrawn at any time. If your order cannot be fulfilled you will be notified and given a full refund.

3. You become a Client when we both agree that you are a Client. So you become a Client only when:

   a. you have sent a completed instruction to us through our web site, (or other means, as agreed) and paid for the Distance Learning Package(s) you have ordered and

   b. we have responded in a manner indicating acceptance, for example by providing or starting to provide the advice or information or materials you have requested.

You cease to be a Client when we have provided the service for which you have paid, or are removed from a programme as a result of breaching your academic responsibilities detailed in Academic Terms and Conditions.

4. Orders are normally fulfilled within 7 working days for the UK and within 14 days for all other orders following receipt of cleared funds. You will be advised of any delay or if the course or materials are not available.

Payments can be made:

- by credit or debit cards
- by cheque or BACs on receipt of an invoice
- by using your PayPal or MoneyBookers Account

5. Payment will be debited from your account before the despatch of your purchase. We will take all reasonable care, in so far as it is within our power to do so, to keep the details of your order secure, but in the absence of negligence on our part we cannot be held liable for any loss you may suffer if a third party procures unauthorised access to any data you provide when accessing or ordering your course from our site.

Electronic transactions are handled through the secure servers at PayPal, MoneyBookers, SagePay, PremiumWebCart, or RomanCart. Please visit their sites if you require further information on how our electronic transfers are secured and encrypted.

6. All prices exclude local taxes that may be chargeable at the point of entry. You will be responsible for these.
7. Tutor support and assignment assessment for distance learning courses may be provided by post, phone, email or other electronic means and will be provided for a maximum of one year from the date of your accepted enrolment or other shorter period as determined by individual course. Further support can be provided at additional cost to be agreed.

8. Acceptance on to a programme of study is not a guarantee of successful achievement.

9. In the unlikely event that your course materials are lost or damaged in transit please contact us:

    Telephone: 0845 8620140

    Blueprint Education and Training Services Limited
    186 Kempshott Lane
    Basingstoke
    RG22 5LB

    Email: enquiries@managers.gb.com

**Returns and refunds policy**

1. **Distance Learning Courses – Paper based materials**

According to the Distance Selling Regulations 2000, you have a cooling off period of seven working days from receipt of goods (see below for full details). This period allows an unconditional right to cancel. You will be required to make such a request in writing to Blueprint Education and Training Services Limited.

Separately from this right to cancel if you have paid in full for your Distance Learning Qualification Course, and you are not fully satisfied, you may cancel any time during the first 30 days from the date of this agreement. In this instance, we will provide you with a full refund, less the cost of any materials sent to you, and any fees paid on your behalf such as CMI registration costs. This does not affect your statutory rights.

Refunds for any other reasons are solely at our discretion. Refunds will not be made where there is any breach of academic responsibilities on the part of the student.

Please contact our advice team on 0845 8620140 or enquiries@managers.gb.com if you have any further questions.

2. **Distance Learning Course – online versions**

According to the Distance Selling Regulations 2000, you have a cooling off period of seven working days from receipt of goods (see below for full details). This period allows an unconditional right to cancel. You will be required to make such a request in writing to Blueprint Education and Training Services Limited.
These courses are provided by electronic means and the service starts immediately. Delivery is therefore deemed to have occurred as soon as you have been granted access to the online learning portal. If you wish to exercise your right under these regulations you should make no attempt to download any learning material or use the services of a tutor as doing so is to consume the service.

Separately from this right to cancel if you have paid in full for your Distance Learning Qualification Course, and you are not fully satisfied, you may cancel any time during the first 30 days from the date of this agreement. In this instance, we will provide you with a full refund, less the cost of any materials sent to you, and any fees paid on your behalf such as CMI registration costs. This does not affect your statutory rights.

Refunds for any other reasons are solely at our discretion. Refunds will not be made where there is any breach of academic responsibilities on the part of the student.

Please contact our advice team on 0845 8620140 or enquiries@managers.gb.com if you have any further questions.

3. Electronic and downloadable products
Due to the electronic and/or personalised nature of these products no right of cancellation or refund exists under Regulation 13 of the Consumer Protection (Distance Selling) Regulations 2000 once a product has been purchased and accessed/downloaded by you.

4. Printed Publication orders
We will give you a full refund on cancellation if:

- you contact us within 7 days of receiving your publications,
- you return the materials to us at your expense
- we receive them back in a re-sellable condition
- with the original despatch note and any security tag attached.

Please contact our advice team on 0845 8620140 or enquiries@managers.gb.com if you have any further questions

NOTHING IN THE ABOVE GUARANTEE AFFECTS YOUR LEGAL RIGHTS

Your Statutory Rights - Cooling-off Period
By law, you have the right to withdraw from your purchase of an item within seven working days of the day after the date the item is delivered to you. We regret that we also cannot accept cancellations of contracts for the purchase of
any items where the item has been unsealed, or for goods supplied by electronic
download where the download has been completed.

To cancel your purchase under this cooling-off period, please contact us, details
are on our contact us page, giving the reason for the return as "contract
cancellation". Please package the relevant item securely and send it to us so that
we receive it within seven working days of the day after the date that the item
was delivered to you.

Registered office: 186 Kempshott Lane Basingstoke RG22 5LB | Registered
UK: 4959425

**Instalment options**

Some distance learning course fees can be paid by instalments.

When you pay by instalments, you are committing to your whole course and to
paying the entire course fees. You will make your first payment on enrolment.
You will then make your remaining payments on a monthly basis, every 30 days
from the date of initial enrolment.

The number of instalments will vary depending on the course; this is identified
on course information at the time of enrolment.

Because we are not in the business of offering a "traditional bank loan type
facility", nor do we use third party credit organisations, we only offer this service
to individuals who are paying their own tuition fees and who are able to pay
their instalments by credit or debit card or through an automated subscription
service such as PayPal or Money Bookers.

We do not charge interest for this service, but do charge a once only set up fee
to cover administration costs.

You should make sure that you act responsibly, and review your financial
circumstances and satisfy yourself that you can afford to commit to paying your
selected courses fees without causing a financial burden to yourself or your
dependants.

It is important to note that:

- Course fees are payable irrespective of your progress on your course. If
  you decide to leave your course before completing (or are removed for
  breaching academic terms and conditions) you will still be expected to pay
  your course fees in full.

- If you do not pay your instalments your course may be cancelled.

- We always take enforcement action to recover unpaid tuition fees.

- We do not issue your qualification certificate until your course fees are
  paid in full.
Appendices

Plagiarism Student guidance

Plagiarism is the use of another's original words or ideas as though they were your own. Any time you borrow from an original source and do not give proper credit, you have committed plagiarism.

*Plagiarism relates to both words and ideas.*

Please bear in mind that paraphrasing or changing the words slightly can still mean plagiarism, since it covers ideas as well as words.

Also, the majority of our tutors are also authors and contributors to many sources including Wikipedia, and they tend to recognise their own words.

We use plagiarism checker software on random samples as well. You can use free checkers on line to help you. Better ones charge fees which are quite small. We prefer: [http://www.plagiarism-detector.com/what-is-plagiarism-detector.php](http://www.plagiarism-detector.com/what-is-plagiarism-detector.php)

Referencing

Referencing your sources means systematically showing what information or ideas you are quoting or paraphrasing, and where they come from.

You can **sparingly** use someone else's words, ideas or information in your assignment - but you must show that they are not your own by indicating their source.

Referencing systems do vary between different fields of study and organisations often have set style guides. Despite these variations, all referencing systems have the same basic components:

1. An in-text reference to show that a piece of information, idea, theory, quotation, etc. you have included in your writing belongs to another writer.

2. A bibliography or reference page at the end of the work where all references are listed in full.
In text referencing

In-text referencing is always designed to be short because it is interrupting the text, and is usually in brackets.

For example: -

Successfully objectives are those which are specific (Doran 1981) and can be measured and evaluated.

OR

Doran (1981) suggests that successful objectives are those which are specific and can be measured and evaluated.

OR

In his article There is a S.M.A.R.T. way to write management's goals and objectives (1981) Doran suggests that successful objectives are those which are specific and can be measured and evaluated.

Bibliography

You should compile full bibliographic information (about when and where the source was published, and by which publisher) at the end of your assignment/report.

An in-text referencing system using the author's family name will always list sources on the references page alphabetically by author's family name –

Example:


Harvard system of referencing

There are various ways of setting out references and bibliographies for an assignment, most common is the Harvard method and this is the style we prefer.

Your bibliography should appear at the end of your assignment/report, but before your appendices.
“Harvard Style” uses in-text references such as (Smith, 1999) and a reference list at the end of the document organised by author name and year of publication.

Your bibliography should identify an item (e.g. book, journal article, or internet site) in sufficient detail so that others can identify it and consult it. If you have used sources from the Internet, these should also be listed in your bibliography. Remember that when we use the internet it is like a virtual library. If you used a book in a physical library, your reference would be for the book not the library. The same is true for the internet.

If the item you are viewing on the internet is a book, article, journal, report, fact sheet etc then you would reference that. You only reference a website when the information is contained within the body of a website page only.

Tips on how to construct your bibliography for different media.

BOOKS
The details required in order are:

1. name/s of author/s, editor/s, compiler/s or the institution responsible
2. year of publication
3. title of publication and subtitle if any (all titles must be underlined or italicised)
4. series title and individual volume if any
5. edition, if other than first
6. publisher
7. place of publication
8. page number(s) if applicable


Explanation of above citation

If you cannot find all of the information for a specific source, such as place of publication get as much down as possible.
Articles

The details required, in order, are:

1. name/s of author/s of the article
2. year of publication
3. title of article, in single quotation marks
4. title of periodical (underlined or italicised)
5. volume number
6. issue number
7. page number(s)

Journal article example


Explanation of above citation

These simple principles can also be applied also to articles and checklists found on the CMI website for example:


Workbooks can be referenced using the information on the inside file cover for example:

Chartered Management Institute (20xx) Unit XXXX, Unit title

Or

Blueprint Education and Training Services Limited (20xx) Unit XXXX, Unit title

In text referencing of checklists and work books can be simple – e.g. workbook XXXX or CMI checklist XXX
For a standard

The details required, in order, and when present, are:

1. **corporate body** issuing standard
2. **year** of publication
3. **title** of standard
4. **number** of standard including identifier of issuing country or body
5. **publisher** of standard
6. **place of publication**

Example:

Chartered management Institute, 2007, Code of Professional Conduct and Practice, Northamptonshire, England

For a web site

Include in your reference:

- author- the person or organisation responsible for the site
- site date- either a 'last update', copyright date or type n.d. if no date available
- name and place of the sponsor of the website
- date of viewing the site
- URL- found in the address bar of your browser

A lot of this information will be found at the bottom of the website or in any about us or contact us section.

Examples

- **A web page with an author**

  Chartered Management Institute, 2010, CMI website Northamptonshire, viewed 24/01/2010
  <http://www.managers.org.uk/research-analysis/research/influencing-public-policy >

- **A web page with no author**

  When you can't determine the author(s) of a website, set out your reference as follows:

  **Page Title**, Last update or copyright date, name and place of the sponsor of the source, date viewed, URL in angle brackets (<>).

Assignment and report writing guidance

Introduction

In education and work, formal reports, letters, memos, email and other written documents communicate information to others without the need for meetings. If you are required to explain your work to others in this way, effective writing skills are vital.

Written reports are a useful management tool, so the ability to produce a good report is essential. Producing effective reports will give you a professional image and get others to take your work seriously. You may also be required to produce written reports as part of your course, and this will give you the chance to enhance your report writing skills.

Reports are a way of informing and persuading people as well as initiating change. You might prepare or contribute to annual, project or progress reports. A well-structured report that has clear objectives will get more attention and is more likely to produce the intended results.

The same is true for written assignments. Although these can be less “formal” than a report, the same skills are needed if you are to effectively communicate your thoughts and ideas to your tutor – essential to pass first time.

Planning an assignment or report

Before you start to write, you need to be clear about what you want to achieve and what you want to say. This will involve some planning. If you plan a report well, it will save time - and will save much drafting and redrafting.

To plan well, you will need to follow several steps:

- Define your aim
- Collect your ideas
- Select the material and decide how to show the significance of your facts
- Structure your ideas

You will then find it much easier to write.

Defining your aim

Start by asking yourself some questions:

- Why am I writing this?
- What do I want to achieve?
- Who will read this?
- What does my reader want to know?
- How will this be used?
- When is this needed?
Once you have answered these questions, you should be clear about the kind of document needed.

Within the context of your course, the answers to these questions may well be:

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why am I writing this?</td>
<td>As a requirement of my assignment</td>
</tr>
<tr>
<td>What do I want to achieve?</td>
<td>To pass the assignment – so refer to the learning aims /assessment criterion for the unit – does your work show that you have learned all you should have?</td>
</tr>
<tr>
<td>Who will read this?</td>
<td>My tutor, an Internal Verifier and an External Verifier.</td>
</tr>
<tr>
<td>What does my reader want to know?</td>
<td>This will be defined by the assignment brief and assessment requirements. Make sure you do everything asked.</td>
</tr>
<tr>
<td>How will this be used?</td>
<td>To assess my competence against the learning outcomes for the unit.</td>
</tr>
<tr>
<td>When is this needed?</td>
<td>By the deadline date agreed with your tutor. Managing your time is an important skill so make sure you give yourself enough time.</td>
</tr>
</tbody>
</table>

**Collecting your ideas**

Start by jotting down ideas in note form. Don’t write sentences at this stage. Remember your report aim and concentrate on the questions in the readers' minds. This will help you to include only those ideas which are relevant, rather than writing everything you know about the subject.

Not all of your ideas will come at once, so plan to meet your deadline. Be prepared to spend some time on noting initial ideas and then set the document aside. When you come back to it later, you will find that your ideas have gelled and that you can see the way ahead more clearly.

**Gathering information**

It may well be that you have to undertake some analysis and research as part of the assignment. Read the assignment carefully and make sure you undertake all the work required. You will also find the information contained in the project guide useful to you.
Here are some common terms often used to indicate the extent of any information gathering or analysis you may be expected to undertake.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>Enquire into, search for information, on, find out about, a systematic investigation</td>
</tr>
<tr>
<td>Investigate</td>
<td>to study or examine carefully all information about</td>
</tr>
<tr>
<td>Analysis</td>
<td>A systematic approach to problem solving. Complex problems are made simpler by separating them into more understandable elements. This involves the identification of purposes and facts, the statement of defensible assumptions, and the formulation of conclusions</td>
</tr>
<tr>
<td>Evaluate</td>
<td>Present an appraisal of the problem stressing the pros, cons, advantages and limitations</td>
</tr>
<tr>
<td></td>
<td>Examine both the strengths and advantages, and weaknesses and limitations of a question and try to reach a judgement</td>
</tr>
<tr>
<td></td>
<td>Present a value judgement, stressing advantages and disadvantages of the situation. E.g. evaluate the contributions of telephones to our lives.</td>
</tr>
<tr>
<td>Review</td>
<td>An analysis undertaken at a fixed point in time to determine the degree to which stated objectives have been reached. This is generally used as a basis for decision making, including updating plans</td>
</tr>
<tr>
<td></td>
<td>Assessment of performance e.g. an assessment of a student’s performance to determine eligibility to continue in a program or to graduate.</td>
</tr>
<tr>
<td>Critically examine</td>
<td>Add a degree or level of accuracy depth, knowledge and understanding, logic, questioning, reflection and quality to analysis/evaluation.</td>
</tr>
</tbody>
</table>

**Selecting your ideas**

Review the content of the document. Are all the ideas relevant? Is there anything which you need to cut out? Have you exceeded the word count? Think about using appendices or attachments to cover detail which the reader may need at a later stage, but does not need in order to understand the main message.

Decide how to show the significance of your facts. Would some graphs or diagrams help the readers understand your message? What visual material will you use? How will you produce it?
Structuring the document

You will need to structure the content in a logical and clear way if you are going to help the readers take in your message.

In a report make sure you have a sequence of headings and sub-headings which will act as signposts to help the readers find the information they need.

For a normal assignment make sure there is a heading for each question so your tutor knows where one answer finishes and another begins.

Also, if you structure a piece of writing well, you will find it easier to choose the words to express your ideas.

A report should be divided into sections and sub-sections, each of which should have a clear heading. If you structure a report well, it will not only help your readers find the information they need but it will also help you when you start writing.

Report structure

A report should be written objectively and more formally than a normal assignment.

Reports are usually broken into the following elements, but if in doubt discuss this with your tutor.

<table>
<thead>
<tr>
<th>Title page</th>
<th>This will include the title of the report, who has written it and the date it was written/Submitted.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledgements</td>
<td>Thanks to the people or organisations who have helped.</td>
</tr>
<tr>
<td>Contents page or index</td>
<td>As in a book, this lists the headings in the report, together with the page numbers showing where the particular section, illustration etc. can be located.</td>
</tr>
<tr>
<td>Executive summary</td>
<td>This is a most important part of many reports and may well be the only section that some readers read in detail. It should be carefully written and should contain a complete overview of the message in the report, with a clear summary of your recommendations.</td>
</tr>
<tr>
<td><strong>Terms of reference</strong></td>
<td>This section sets the scene for your report. It should define the scope and limitations of the investigation and the purpose of the report. It should say who the report is for, any constraints (for example your deadline, permitted length) - in other words, your aims and objectives - the overall purpose of your report and more specifically what you want to achieve.</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Methodology or procedures</strong></td>
<td>This section outlines how you investigated the area. How you gathered information, where from and how much (e.g. if you used a survey, how the survey was carried out, how did you decide on the target group, how many were surveyed, how were they surveyed - by interviews or questionnaire?)</td>
</tr>
<tr>
<td><strong>Introduction or background, scene setting</strong></td>
<td>This will help to tune your readers in to the background of your report. It is not another name for a summary and should not be confused with this. They can be two separate sections or combined: background detail could include details of the topic you are writing about. You could take the opportunity to expand on your Terms of Reference within the introduction, give more detail as to the background of the report - but remember to keep it relevant, factual and brief.</td>
</tr>
<tr>
<td><strong>Findings and analysis</strong></td>
<td>This is the main body of the report, where you develop your ideas. Make sure that it is well structured, with clear headings, and that your readers can find information easily. Use paragraphs within each section to cover one aspect of the subject at a time. Include any graphs or other visual material in this section if this will help your readers. The nature of this section will depend on the brief and scope of the report. The sections should deal with the main topics being discussed - there should be a logical sequence, moving from the descriptive to the analytical. It should contain sufficient information to justify the conclusions and recommendations which follow. Selection of appropriate information is crucial here: if information is important to help understanding, then it should be included; irrelevant information should be omitted.</td>
</tr>
<tr>
<td><strong>Conclusions</strong></td>
<td>These are drawn from the analysis in the previous section and should be clear and concise. They should also link back to the Terms of Reference. At this stage in the report, no new information can be</td>
</tr>
</tbody>
</table>
The conclusions should cover what you have deduced about the situation - bullet points will be satisfactory.

**Recommendations**

Make sure that you highlight any actions that need to follow on from your work. Your readers will want to know what they should do as a result of reading your report and will not want to dig for the information. Make them specific - recommendations such as "It is recommended that some changes should be made" are not helpful, merely irritating.

As with the Conclusion, recommendations should be clearly derived from the main body of the report and again, no new information should be included.

**References**

References are items referred to in the report. The Bibliography contains additional material not specifically referred to, but which readers may want to follow up.

**Appendices**

Use these to provide any more detailed information which your readers may need for reference - but do not include key data which your readers really need in the main body of the report. Appendices must be relevant and should be numbered so they can be referred to in the main body.

**Glossary**

Provide a glossary if you think it will help your readers but do not use one as an excuse to include jargon in the report that your readers may not understand.

---

1. Make sure the structure is complete. It must cover all the facts and ideas. Sections like General or Other Notes are just “dustbins” and usually show that the design is the wrong one.

2. Your headings must be helpful and clear - they must tell the readers about the information in each section. One-word headings are often vague and misleading. Don't be afraid of using headings that are eight or nine words long - they will help you to be more certain of what to put in each section, and will help your readers to find the details they need.

3. Your sections should be watertight. Each point should fit logically into only one section. This is not always possible - you may need to remind your readers of something you said earlier - but don't give up easily. Over-repetition may indicate a bad design.

4. Do not have too much material in each section - or too many headings in a string. Your readers will only be able to cope with a maximum of about six points, if they are going to remember the points you are making.
Overall presentation

Good presentation can make a report or assignment clearer. Consider the following points when writing:

1. Overall impact – business type font style and size, plenty of white space etc.

2. Headings – are very useful as they signpost your work and give it context. If you have lots of sub-headings they should be clearly ranked. Look at the example below and you can see there are three styles of headings - one for main sections, one for sub-sections, and one for further sub-sections.

3. Numbering - numbering your sections makes the report easier to follow. A common system is to number a main section, then for sub-sections to place a dot after the main section number and begin to number again. You can continue to a further level.

   For example:

   4. Improvements to service
      4.1. Revenue costs
      4.2. Communications payment cycles

This makes it easier to refer the reader to a specific part of the report, e.g. paragraph 3.2.2, rather than to say "about half way down page 5".

Essential skills and techniques

The following skills are useful ones when writing assignments and reports:

- **SUMMARISING** means briefly giving the main points of something.
  
  We see examples of this all around us every day - the News Summary is much shorter than the main news bulletin, and only gives the basic facts
  
  Conventionally, summarising a piece of text means cutting it to about one third of its original length, and using your own words - paraphrasing - where possible.

- **PARAPHRASING** means expressing the meaning of something in other words. If you can paraphrase a piece of text, it probably means you've understood it, since you are accurately conveying its meaning in your own words.

- **TABLES AND GRAPHS** are useful ways of summarising statistical information into something more readable and digestible.

- **BULLET POINTS AND LISTS** help get ideas or facts across quickly using fewer words and are more visually appealing.
• **MIRRORING** means using words and phrases found in the assessment criterion to start sentences or paragraphs. This helps you to keep focussed and signposts your work to your tutor.

• **POSITIVE WRITING** prevents padding. For example:

  If people write in a more positive way there is a good chance that by doing so their sentences will be shorter and to the point. – 26 words

  People who write positively produce crisp short sentences. – 8 words

  **This is essential to effective writing and maintaining word counts.**

**Editing and proofing**

It is useful to put your assignment or report aside for a few days before proofing. This allows you to become detached from it and spot errors more easily. Use this checklist:

**The purpose**
Have your clarified your purpose?
Have you identified your readers' needs/characteristics?
Have you remembered these when considering the items below?

**Information**
Have you included the main points?
Are points supported by evidence?
Is the information relevant to the purpose and accurate?
Do the figures add up?
Are the references correct, in the text and at the end?
Are all sources of information listed in the References section?

**Presentation**
What is the balance between sections - do the most important items have the most space?
Is the report easy to follow?
Is it easy to find information in the report?
Are headings and numbering clear?
Are the arguments followed through?
Is it logical/easy to follow?
Is it clear, direct, easy to read?
Will the readers understand it?
Will its tone help you achieve the purpose?
Are images clear?
Can unnecessary words/phrases be deleted?
Is the grammar/punctuation correct?
Is there any repetition?
Is the layout appealing?
Are there spelling mistakes?
Are abbreviations consistent?
Assignment submission forms

The following forms are the assignment submission forms.

If you are submitting your assignments by post you can photocopy these forms for each assignment.

If you are submitting your assignments electronically your tutor will provide you with electronic versions.

The forms consist of:

<table>
<thead>
<tr>
<th>Assignment submission and feedback sheet</th>
<th>You MUST complete this. You are required to complete sections 1, 2 of this form. Ensure your candidate number (see CMI welcome pack) is on the form.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statement of authenticity</td>
<td>You MUST complete the top half of this form. You tutor will complete the bottom half.</td>
</tr>
<tr>
<td>Reflective statement</td>
<td>You MUST complete this sheet</td>
</tr>
<tr>
<td>Mentor report</td>
<td>If you have a mentor this form is for your them to complete. It is not a mandatory form so do no delay in submitting your assignment if you are unable to get your mentor to complete it immediately. It can be done and added to your portfolio at a later date.</td>
</tr>
</tbody>
</table>

When submitting electronically you may use a digital signature or type your name in the signature areas.

After your assignment has been marked your tutor will return these forms with their added comments.

You MUST then print the forms and add them to your portfolio with a copy of the submitted assignment.
Assignment submission and feedback sheet

INSTRUCTIONS FOR USE
Please complete sections 1, 2, and 6 before submitting your assignment. If you have a mentor they may comment in section 7 if you wish.

SECTION 1

<table>
<thead>
<tr>
<th>Learner Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate/Membership number:</td>
<td></td>
</tr>
<tr>
<td>Unit number:</td>
<td></td>
</tr>
<tr>
<td>Tutor Name:</td>
<td></td>
</tr>
<tr>
<td>Date set:</td>
<td>Date submitted:</td>
</tr>
</tbody>
</table>

SECTION 2

Candidate statement of authenticity

I confirm that this is my own individual work and does not include the work of others and that all sources of information have been acknowledged. I have completed the assignment in accordance with CMI instructions and within the time limits set by my centre.

Signed Candidate: (please type name) Date:

SECTION 3

Grade: □ Pass □ Refer For feedback next page

Tutor/Assessor signature Date:

Further work required if Refer grade

SECTION 4

INTERNAL VERIFIER USE ONLY
Agree grade □ Yes □ No Date of IV:

IV Name: IV Signature:
SECTION 5
Feedback from your tutor:

<table>
<thead>
<tr>
<th>Task</th>
<th>Learning outcome</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

SECTION 6

Reflective Summary
What I have learned through this assignment:

Relevance of skills to my workplace

SECTION 7

Mentor report
Mentor comments, to cover where possible the value of the assignment to the workplace and to the candidate:

Any other comments:

Mentor’s Name:

Position:

Signature: (please type name)  Date:
Level 7 Professional Consulting

Syllabus extract
Credit values

Credit value is defined as being the number of credits that may be awarded to a learner for the successful achievement of the learning outcomes of a unit.

The credit value of the unit will remain constant in all contexts, regardless of the assessment method used or the qualifications to which it contributes. Learners will only be awarded credits for the successful completion of the whole units.

Rules of combination

Roles of combination are defined as being a description of the credit accumulation requirements for the achievement of a given qualification. The rules of combination must be adhered to in order to achieve the qualification.

CMI level 7 Award in professional consulting (QC F)

Learners must complete one unit to a minimum of six credits to achieve this qualification

<table>
<thead>
<tr>
<th>Units number</th>
<th>unit name</th>
<th>Level</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>7026</td>
<td>Organisational structure and culture</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>7027</td>
<td>Entry and diagnosis</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>7028</td>
<td>Group dynamics and facilitating skills</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>7029</td>
<td>Communication strategies for consulting</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>7030</td>
<td>Managing consultancy interventions</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>7031</td>
<td>Tools and techniques for effective consulting</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>7032</td>
<td>Managing the business of consulting</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

CMI level 7 Certificate in professional consulting (QC F)

Learners must complete two units to a minimum of 13 credits to achieve this qualification

<table>
<thead>
<tr>
<th>Units number</th>
<th>unit name</th>
<th>Level</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>7026</td>
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<td>7</td>
<td>8</td>
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<td>7027</td>
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<tr>
<td>7032</td>
<td>Managing the business of consulting</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>
CMI level 7 Diploma in professional consulting (QC F)

Learners must complete all mandatory units to a total of 32 credits and three optional units to a minimum of 20 credits to achieve this qualification.

**Mandatory units**

<table>
<thead>
<tr>
<th>Units number</th>
<th>unit name</th>
<th>Level</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>7026</td>
<td>Organisational structure and culture</td>
<td>7</td>
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<td>7</td>
<td>9</td>
</tr>
</tbody>
</table>

**Optional units**

<table>
<thead>
<tr>
<th>Units number</th>
<th>unit name</th>
<th>Level</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>7024</td>
<td>Professional practice</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>7025</td>
<td>Professional development in consulting</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>7028</td>
<td>Group dynamics and facilitating skills</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>7029</td>
<td>Communication strategies for consulting</td>
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<td>7</td>
</tr>
<tr>
<td>7032</td>
<td>Managing the business of consulting</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>7002</td>
<td>Strategic performance management</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>7006</td>
<td>Organisational direction</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>7010</td>
<td>Organisational change</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>7020</td>
<td>Leadership coaching and mentoring skills</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

**Recognition of prior learning and achievement**

The Qualifications Credit Framework (QC F) 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. The CMI will publish on its website which units and qualifications from other awarding bodies can be recognised for credit transfer and exemption. Credit transfer in the QC F will be based on confirmation of achievement of QC F numbered units.

There will of course still be instances where learners will wish to claim recognition of prior learning which has not been formally assessed and accredited. In those circumstances centres are free after discussion and agreement with their CMI Quality Manager to allow these learners direct access to the relevant assessment for the unit without unnecessary repetition of learning.
Unit details

In order to achieve a pass grade you must complete the assignment tasks fully and in the process satisfy the learning outcomes for this unit of study.

Each learning outcome has minimum assessment criterion that your tutor will use to make their assessment decision. A table showing the learning outcomes and their related assessment criterion is reproduced below.

<table>
<thead>
<tr>
<th>Title:</th>
<th>Professional practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit number</td>
<td>7024</td>
</tr>
<tr>
<td>Learning Outcomes</td>
<td>Assessment criteria</td>
</tr>
<tr>
<td>The learner will:</td>
<td>The learner can:</td>
</tr>
</tbody>
</table>
| 1. Be able to act with professionalism and integrity as a consultant | 1.1 explain why it is important to represent the profession of consultancy responsibly  
1.2 evaluate the significance of integrity in the consulting process  
1.3 evaluate the importance of codes of conduct and practice to clients, consulting organisations and to the industry |
| 2. Understand the importance of maintaining confidentiality in professional practice | 2.1 assess methods of ensuring client confidentiality is maintained  
2.2 discuss the dilemmas that may arise relating to confidentiality of information and how these may be resolved |
| 3. Know how to behave in an ethical manner when working as a consultant | 3.1 identify a range of ethical dilemmas which consultant may experience  
3.2 explain how to resolve a range of ethical conflicts  
3.3 critically evaluate the role of an organisation's cultural values in promoting a high standard of ethical conduct from its consultants |
<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Assessment criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The learner will:</strong></td>
<td><strong>The learner can:</strong></td>
</tr>
</tbody>
</table>
| 1. Be able to manage personal professional development | 1.1 explain how emerging trends and challenges impact upon the strategic direction of the consultant’s own organisation  
1.2 evaluate the skills, knowledge and behaviours required by the consultant to meet these challenges  
1.3 appraise the cost and benefits of different personal professional development activities  
1.4 construct a personal development plan (PDP) to support personal professional development  
1.5 assess the impact of the personal development plan on the achievement of the organisation’s objectives |
| 2. Be able to manage the personal development of others | 2.1 explain the link between human resource development and organisational effectiveness  
2.2 evaluate methods of assessing skills, behaviours and competencies of teams and individuals fairly and objectively  
2.3 construct personal development plans at both team and individual level  
2.4 critically evaluate different methods of providing feedback to individuals and teams  
2.5 discuss the effects of a culture of encouraging continual professional development (CPD) on the performance of an organisation/consultancy practice  
2.6 explain why an organisation/consultancy practice should appraise the impact to the organisation of individuals undertaking specific CPD |
| 3. Be able to manage personal networks | 3.1 critically evaluate the role of networks in personal development, client interface and career progression  
3.2 assess the benefits to the consultant’s organisation of developing personal networks  
3.3 evaluate the effectiveness of existing networks in contributing to personal and organisational objectives  
3.4 develop a plan to improve and expand current personal networks  
3.5 discuss the skills and behaviours required to build and maintain networks |
<table>
<thead>
<tr>
<th>Title:</th>
<th>Organisational structure and culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit number</td>
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</table>

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>The learner will:</td>
<td>The learner can:</td>
</tr>
</tbody>
</table>

| 1. Understand the effects of organisational structure | 1.1 explain different types of organisational structures  
1.2 analyse the impact of organisational structure on the achievement of operational and strategic objectives  
1.3 describe situations where organisational structure can have a negative impact on the organisation |

| 2. Understand the impact of organisational culture on an organisation | 2.1 discussed the different types of organisational cultures that may exist within client organisations  
2.2 evaluate the external and internal influences of organisational culture  
2.3 analyse the impact of organisational culture on the achievement of an organisation's objectives  
2.4 critically evaluate a range of tools and models that a consultant may use when analysing the current culture of an organisation  
2.5 describe the effects of a culture which does not support organisational objectives |

| 3. Understand the impact on consultants work of structure and culture within a client organisation | 3.1 assess the impact of different cultures and structures within client organisations on the consultancy interventions  
3.2 evaluate how legal regulatory and organisational policies within a client organisation impact upon the work of a consultant  
3.3 explain how an organisation's values culture and structure may affect the recommendations made by a management consultant  
3.4 discuss the role of the consultant in supporting changes to organisational culture |
<table>
<thead>
<tr>
<th>Title:</th>
<th>Entry and diagnosis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit number</td>
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</tr>
<tr>
<td>Learning Outcomes</td>
<td>Assessment criteria</td>
</tr>
<tr>
<td>The learner will:</td>
<td>The learner can:</td>
</tr>
</tbody>
</table>
| 1. Know how to establish and maintain working relationships with the client | 1.1 assess the effect client competencies and behaviours can have on the consultant/client relationship  
1.2 critically evaluate a range of tools and techniques that can be used to establish positive working relationships and credibility with clients  
1.3 assess the impact on consultancy interventions of the consultant/client relationships  
1.4 evaluate the role of professionalism, ethics and confidentiality to the consultant client relationship |
| 2. Be able to manage communications during entry and initial diagnosis | 2.1 assess the communication needs of key individuals in the consulting and client organisation  
2.2 assess the information requirements and levels of information access for key individuals within the consulting and client organisation  
2.3 evaluate tools and methods of effective communication with client stakeholders and consulting organisations |
| 3. Be able to develop a strategy for identifying and scoping clients needs | 3.1 explain the techniques a consultant may use to appreciate the client perspective and the needs of stakeholders  
3.2 critically evaluate sources of information and methods of researching clients issue  
3.3 assess the significance of risk appraisal and benefit analysis to the scoping process  
3.4 explain how to agree a problem statement/scoping document with the client assess the importance of identifying key constraints and/or criterion for success in scoping clients needs |
<table>
<thead>
<tr>
<th>Title:</th>
<th>Group dynamics and facilitating skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit number</td>
<td>7028</td>
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<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Assessment criteria</th>
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<tr>
<td>The learner will:</td>
<td>The learner can:</td>
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</table>

1. **Understand the group dynamics and the impact on the achievement of objectives**
   1.1 evaluate a range of models on group dynamics and high performing teams
   1.2 assess the impact of the dynamics on the achievement of objectives and consultancy intervention outcomes
   1.3 create a strategy to develop the skills required for a high impact team
   1.4 devise strategies to overcome the negative effects of group dynamic on consulting interventions

2. **Be able to strategically lead groups**
   2.1 evaluate the role of the consultant as a leader in ensuring a consultancy/Project team achieved its objectives
   2.2 evaluate the techniques a consultant may use to direct groups and teams
   2.3 discussed the different roles a consultant may be required to adopt to ensure the effectiveness of the group
   2.4 explain situations when it may be appropriate for a consultant to adopt the role of facilitator
   2.5 evaluate the challenges in managing a diverse group

3. **Be able to develop productive working relationships with others**
   3.1 assess the impact of the consultant's behaviour on developing and maintaining productive working relationships
   3.2 evaluate strategies and techniques for developing good working relationships with managers, team members and peers
<table>
<thead>
<tr>
<th>Title:</th>
<th>Communication strategies for consulting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit number</td>
<td>7029</td>
</tr>
<tr>
<td>Learning Outcomes</td>
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<td>The learner will:</td>
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</tbody>
</table>
| **1. Understand how communication impacts on others involved in the consulting process** | 1.1 explain theories and concepts relating to verbal and non-verbal communication methods  
1.2 evaluate the impact of verbal and non-verbal communication skills on the achievement of objectives  
1.3 evaluate the impact of verbal and non-verbal communication skills on the development of productive working relationships  

discuss how verbal and non-verbal communication skills can be used to overcome difficult situations |
| **2. Be able to create a communication strategy for a consultancy intervention** | 2.1 discuss methods and techniques for identifying key individuals to be included in any communications strategy  
2.2 analyse the needs of key individuals in any communications strategy  
2.3 analyse the information requirements and levels of information access required the consulting intervention  
2.4 discuss the key factors that influence the choice of communication methods to be used |
| **3. Understand how to communicate the results of Consultancy interventions** | 3.1 discuss concepts and theories relating to the management of meetings  
3.2 explain the nature of report writing for impact  
3.3 discuss concepts and theories relating to delivering presentations the impact  
3.4 evaluate different methods of presenting results of consultancy interventions to clients  
3.5 discuss the process of designing and delivering a training programme |
<table>
<thead>
<tr>
<th>Title:</th>
<th>Managing consultancy interventions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit number</td>
<td>7030</td>
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<tr>
<td>Learning Outcomes</td>
<td>Assessment criteria</td>
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<td>The learner will:</td>
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1. Understand the consulting model
   - 1.1 analyse the key activities involved at each stage of the consulting cycle.
   - 1.2 evaluate the risks and challenges which may occur at each stage of the consulting cycle.
   - 1.3 develop strategies to overcome risks and challenges which may occur during an intervention.

2. Understand how to use different approaches to a consultancy intervention
   - 2.1 discuss a range of interventions a consultant may be involved in.
   - 2.2 evaluate a range of approaches and styles that can be used by consultants in different interventions.
   - 2.3 select suitable approaches to meet the nature and type of consultancy intervention.
<table>
<thead>
<tr>
<th>Title: Tools and techniques for effective consulting</th>
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<tbody>
<tr>
<td>Unit number 7031</td>
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<td>The learner will:</td>
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1. **Understand how to identify client needs**
   1.1 explain the need to apply a structured approach in identifying the client issues
   1.2 evaluate a range of tools and techniques a consultant may use in defining the client needs

2. **Each able to develop appropriate research strategies for consultancy interventions**
   2.1 evaluate a range of methods of gathering and sourcing key information and knowledge for use in consultancy interventions
   2.2 explain how to validate and filter the knowledge and data gathered
   2.3 evaluate different tools and techniques of data analysis as a consultant might use
   2.4 assess how a range of problem solving and decision making tools and techniques may be used in consultancy interventions
   2.5 discuss the role of creative thinking in the analysis of data and knowledge

3. **Understand the importance of expert tools and techniques to a management consultant**
   3.1 evaluate the contribution of performance management, benchmarking, modelling and business process improvement techniques make to consultancy intervention
   3.2 evaluate the benefits and limitations of a range of tools and techniques which could be used in a consultancy intervention
   3.3 select the most appropriate analysis techniques and tools for an intervention
   3.4 evaluate ways of leveraging operating experience and knowledge the future benefit of the practice
<table>
<thead>
<tr>
<th>Title:</th>
<th>Strategic performance management</th>
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<tr>
<td>Unit number</td>
<td>7002</td>
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### Learning Outcomes

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</table>

1. **Be able to set performance targets of teams to meet strategic objectives**
   - 1.1 assess the links between team performance and strategic objectives
   - 1.2 evaluate tools and techniques available to set team performance targets
   - 1.3 assess the value of team performance tools to measure future team performance

2. **Be able to agree team performance targets to contribute to meeting strategic objectives**
   - 2.1 analyse how to determine required performance targets within teams against current performance
   - 2.2 discussed the need to encourage individual commitment to team performance in achievement of organisational objectives
   - 2.3 relates the application of delegation mentoring and coaching to the achievement of the organisational objectives
   - 2.4 evaluate a team performance plan to meet organisational objectives

3. **Be able to monitor actions and activities designed to improve team performance**
   - 3.1 assess the process for monitoring team performance and initiate changes where necessary
   - 3.2 evaluate team performance against agreed objectives of the plan
   - 3.3 evaluate the impact of team performance in contributing to meeting strategic objectives

4. **Be able to apply influencing and persuading skills to the dynamics and politics of personal interactions**
   - 4.1 determine influencing and persuading methodologies to gain the commitment of individuals to course of action
   - 4.2 discussed the impact of individual dynamics interests and organisational politics on securing the commitment of individuals to a course of action
<table>
<thead>
<tr>
<th>Title:</th>
<th>Organisational direction</th>
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<tbody>
<tr>
<td>Unit number</td>
<td>7006</td>
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<td>Learning Outcomes</td>
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| **1. Be able to review and determine the organisational strategic aims and objectives** | 1.1 identify the current strategic aims and objectives  
1.2 undertake an evaluation of the component parts of a strategic plan  
1.3 analyse the factors affecting the strategic plan |
| **2. Be able to identify and analyse progress towards organisational strategic aims and objectives** | 2.1 apply a range of strategic analysis tools to audit progress towards strategic aims and objectives  
2.2 review and assess the expectations of all stakeholders and their influence upon the organisational strategy  
2.3 analyse, interpret and produce a structured evaluation of the organisational strategic position |
| **3. Be able to determine and evaluate strategic options to support a revised strategic position** | 3.1 identify and develop a range of alternative strategic options to meet strategic aims and objectives  
3.2 determine and justify the strategic option that meets the revised strategic position |
<table>
<thead>
<tr>
<th>Title:</th>
<th>Strategic project management</th>
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<tr>
<td>Unit number</td>
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</table>
| 1. Understand the impact of projects and project management and strategic objectives | 1.1 assess the purpose of project planning and management  
1.2 analyse how projects impact on the strategic objectives of an organisation |
| 2. Understand the elements of the project process and plan | 2.1 described the roles of a project sponsor and other project stakeholders  
2.2 evaluate the need to scope and identify specifications to develop a project plan  
2.3 explain the phases necessary in the construction of a project plan |
| 3. Understand how to implement the project plan and evaluate the outcome | 3.1 described the process of gaining project implementation agreement  
3.2 assess the methods of securing stakeholder support the project implementation and operations  
3.3 discuss the evaluation process to measure project performance (on-going/handover) to meet strategic objectives |
<table>
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</table>
| 1. Understand how to apply solutions to organisational change | 1.1 identify a range of organisational change models or frameworks  
1.2 apply a range of creative problem-solving techniques to address challenges  
1.3 identify and justify change solutions that the link to organisational strategic plan |
| 2. Understand how to develop a change strategy using implementation models | 2.1 evaluate a range of change implementation models  
2.2 identify the criteria to select a change implementation model that supports organisational change |
| 3. Be able to analyse and organisational response to change | 3.1 demonstrate the use of analytical tools to monitor the progress and the effect of change  
3.2 assess monitoring and measurement techniques to change within an organisation  
analyse strategies to minimise adverse effects of change |
| 4. Understand how to evaluate the impact of change strategies | 4.1 identify the processes to review the impact of the change  
4.2 analyse the results of the impact review  
4.3 present the findings of the change analysis |