



Pathways to Management and Leadership

Level 5: Management and
Leadership

Student Guide

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Introduction

Welcome to *Pathways to Management and Leadership*, a series of workbooks created by the Chartered Management Institute to support our range of management qualifications.

The aim of this Student Guide is to provide you with information and advice to help you to plan for the successful completion of your studies using the *Pathways* workbooks. You are advised to read through this guide thoroughly before you make a start on your Level 5 in Management and Leadership programme.

About the Level 5 in Management and Leadership

The Level 5 Qualifications in Management and Leadership are described as follows in the Centre Assessment Guidance:

'These qualifications are designed for managers, to support the development of their leadership and management skills in personal development, leadership, management resources, information, performance, customer and market awareness.'

'Although the qualifications can be offered to learners from age 16, in practice the majority of learners at this level would be expected to be over 19. CMI does not specify entry requirements for these qualifications, but Centres are required to ensure that learners admitted to the programme have sufficient capability at the right level to undertake the learning and assessment.'

Using the *Pathways to Management and Leadership* open learning workbooks as part of the training programme ensures that you understand and practise key management skills in the most effective way.

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The qualifications structure

At Level 5, you can achieve four qualifications depending on the number of credits that you complete.

The table below provides an indication of the credits and the guided learning hours for each of the 16 units in the *Pathways* series at Level 5.

Unit number	Unit title	Credits	Guided learning hours
5001V1	Personal development as a manager and leader	6	20
5002V1	Information based decision making	7	25
5003V1	Managing team and individual performance	9	30
5004V1	Practices of resource management	7	25
5005V1	Meeting stakeholder and quality needs	6	20
5006V1	Conducting a management project	10	35
5007V1	Organisational financial management	9	20
5008V1	Conducting a marketing plan	9	30
5009V1	Project development and control	6	20
5010V1	Planning for development	6	20
5011V1	Managing recruitment, selection and induction	7	25
5012V1	Being a leader	7	30
5013V1	Leadership practice	7	30
5020V1	Introduction to management and leadership	7	45
5021V1	Operational risk management	7	25
5022V1	Organisational corporate social responsibility	7	30

With the new qualifications structure, you can achieve a Level 5 Award, a Level 5 Certificate, a Level 5 Diploma in Management and Leadership and/or a Level 5 Extended Diploma in Management and Leadership. In most cases, your approved centre will have selected the units it will offer for each qualification, so not all units will be available to all learners at all centres.

CMI Level 5 Award in Management and Leadership

Learners need to complete any single unit successfully to achieve the Award. Unit 5020V1 is particularly valuable in giving a sound introduction to management and leadership.

CMI Level 5 Certificate in Management and Leadership

Learners need to complete any combination of units to a minimum of 13 credits to achieve the qualification.

CMI Level 5 Diploma in Management and Leadership

Learners need to complete any combination of units to a minimum of 38 credits to achieve the qualification.

CMI Level 5 Extended Diploma in Management and Leadership

Learners need to complete:

- Units 5001V1, 5002V1, 5004V1, 5005V1 and 5006V1, plus
- either Unit 5003V1 or 5012V1, plus
- any other three units

to a total of at least 62 credits to achieve the qualification.

Guided learning hours

The Centre Assessment Guidance describes guided learning hours as follows:

Guided learning hours are intended to relate only to facilitated learning and associated assessments – individual private study is not included – and are intended to give guidance to delivery Centres on the amount of resource needed to deliver the programme and support learners.

The *Pathways* workbooks have been carefully written and designed to support your individual study as you develop knowledge and understanding of the key management skills and how they can be applied to your particular workplace and job-role. The workbooks do not provide all the guided learning hours for any unit, but can underpin the information and skills development provided by trainers or tutors at your workplace or approved centre. The following section of the guide aims to provide help in structuring and understanding the time required to complete any given unit.

Benefits of the qualification

The Level 5 in Management and Leadership sits at level 5 in all the UK qualifications frameworks. Achieving the Level 5 in Management and Leadership can help you in a number of ways. It will:

- increase your credibility and confidence as a supervisor or manager

- develop your communication skills and improve team performance
- enable you to understand and meet customer needs effectively
- help you contribute to your organisation's success in achieving business objectives
- provide you with a stepping stone to further management qualifications or progression to university.

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Series overview

The *Pathways* series comprises a set of workbooks, each one designed to support your study in specific units of the Level 5 in Management and Leadership qualification. The workbooks have been written by experienced management authors and reviewed by external verifiers from CMI. Each workbook includes the following:

- **About this workbook:** This sets out the aims of the unit covered in the workbook and what it means to you as a manager.
- **Learning outcomes:** These are drawn from the syllabus to indicate what you will be assessed on.
- **Sections:** These break the workbooks down into a number of discrete pieces of learning:
 - **Supporting text** contains examples and summaries of management skills and theories which cover the relevant learning outcomes.
 - **Scenarios** provide practical examples of the key issues in a range of typical workplace contexts.
 - **Learning activities and feedback** help to consolidate your learning.
 - **Self-assessment questions** help to check your knowledge and understanding at the end of each section.
 - **Section summaries** help to review progress and provide a reminder of the key learning points.
- **Before you move on:** This provides an opportunity for you to recap on your learning and to see how the unit relates to the National Occupational Standards.
- **Bibliography:** This provides details of books referred to in the unit workbooks.

Each section will usually take between one and two hours to complete and is designed to encourage you to apply what you have learned back in your workplace.

The workbooks prepare you for assessment using practical and relevant workplace examples appropriate to your own experience and skill development.

Pathways workbooks can also be used in the following ways:

- for self-study to consolidate training opportunities arising in your own workplace
- to provide additional explanations of key theories and models to supplement your classroom-based learning
- in a distance or online learning programme to provide you with the opportunity to learn at your own pace, with

guidance from a personal tutor and in a way that fits in with your work-life balance.

Planning to study

When planning your study it can be useful to consider **how** you learn as well as **what** you want to learn. Knowing and understanding the learning styles that work best for you can help you to learn more effectively. There is no single method of learning that guarantees success and the *Pathways* workbooks have been designed to create learning opportunities through activities that help you learn effectively in either classroom-based or distance learning courses and to apply that learning in your workplace.

This section aims to help you think about your preferred learning styles and illustrates how the workbook design will support and develop your approach to learning.

Let's start by thinking about your learning history.

Activity

Activity 1 (about 10 minutes)

Think about one good (enjoyable and effective) learning experience that you have had as an adult and then another experience that was less effective and enjoyable.

Ask yourself why the first was more effective and the second was not. Note your thoughts below

First learning experience	Why was it enjoyable and effective?
Second learning experience	Why was it less enjoyable and effective?

Feedback

We all have a learning history that has both positive and negative experiences. It is likely that you will have some emotional feelings about the experiences you noted. All learning has an affective component (to do with feelings) as well as a cognitive one (to do with thinking). Reflecting on this and resolving any tensions in our feelings about learning is an important part of finding out how you learn.

A lot of research has been done on how adults learn best and there are many different theories to examine different learning styles. One of the best known models was developed by Peter Honey and Alan Mumford for middle and senior managers in the 1980s. They stated that we all have preferred ways of learning, which means that some learning experiences are more enjoyable or useful for us than others.

However, these preferred learning styles are acquired preferences that are adaptable, either at will or through changed circumstances, rather than being fixed personality characteristics. Honey and Mumford encourage managers to focus on strengthening under-utilised styles in order to become better equipped to learn from a wide range of everyday experiences.

Activity**Activity 2**

(about 10 minutes)

Think about the following personal development activities, some of which you may have experienced. Based on how successfully you have learned (or how successfully you think you would learn) in these situations, rate each one by putting a ✓ in the appropriate box.

Development activity	Your rating		
	Very good	OK	Not so good
Formal training courses in a classroom			
Conferences or seminars where you listen to presentations			
Computer based training or e-learning			
Group working			
Team building events			
Shadowing by observing and following a colleague in their duties			
Open or distance learning			
Business games and simulations			
Reading list or personal research			
Project work			

Feedback

Have a look at the responses you rated 'Very good' and compare them with those you rated 'Not so good'. What conclusions can you draw from the types of responses that you've made? There are no correct answers here, but you will probably find that you have tended to group together activities based on the level of interaction, amount of reflection, level of theory, ability to experiment, etc.

Honey and Mumford identified four distinct learning styles as follows:

- Activists involve themselves fully and without bias in new learning experiences. They are open-minded, not sceptical, and tend to act first and consider the consequences afterwards.
- Reflectors like to stand back and think about their experiences, observing them from several different perspectives. They collect data and prefer to consider it thoroughly before coming to any conclusions.
- Theorists adapt and integrate observations into complex but logically sound theories. They think problems through in a vertical, step by step, logical way.
- Pragmatists are keen to try out ideas, theories and techniques to see if they work in practice. They positively search out new ideas and take the first opportunity to experiment with applications. They tend to be impatient with ruminating and open-ended discussions.

Which of these descriptions best summarises your preferred learning style? You may have a strong preference for one style, with a low preference in all of the others, or there may be more balance across each area.

Activity**Activity 3**

(about 10 minutes)

What do you think are the advantages and disadvantages of your preferred style(s) of learning?

- I think my preferred learning style(s) are:

- The advantages of the style(s) are:

- The disadvantages of the style(s) are:

- To mitigate against these disadvantages I can do the following:

Feedback

To examine your learning styles in more detail, you could try keeping a 'learning diary' over a short period of time (such as a week) or while you study a topic in a Pathways workbook. For each study session or activity make a note of:

- *practical details such as what, when, where and how you studied*
- *anyone else involved, such as a tutor or your peers*
- *the study methods and the skills you used*
- *your feelings about how it went and the effectiveness of each study session*
- *a comment on how you might change your practice to be more effective next time.*

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As part of their work on learning styles, Honey and Mumford also established that learning is an iterative process. Their four-stage diagram to illustrate this is shown below.

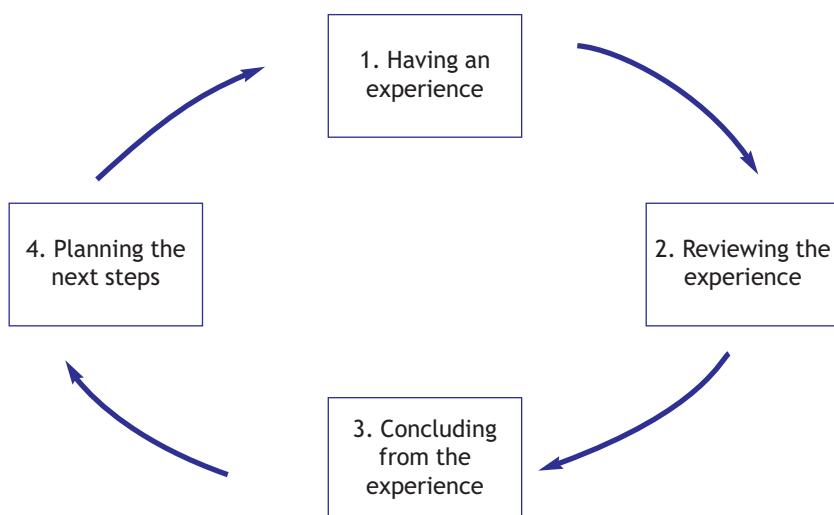


Fig 1: Based on Honey and Mumford's 'Learning Cycle' (1982)

This four-stage process can be used to explain the approach to learning that you will experience on this Level 5 programme. The workbooks in the *Pathways* series have been written in a way that follows the learning cycle. To make your learning successful, you will be encouraged to undertake each of the stages in the cycle, as described below.

1. **Having an experience:** You receive information and perspectives from the workbooks in the form of scenarios, examples, tools, theories and models.
2. **Reviewing the experience:** You are encouraged to undertake the activities in the workbooks to help you compare the new approaches with what you know already.
3. **Concluding from the experience:** Action plans and self-assessment questions encourage you to form theories that help you think about how these can help you to manage better in the workplace.
4. **Planning the next steps:** Applying what you have learned by implementing actions, improvements or changes to what you currently do.

You need to consider the process as a continuous one, starting at stage 1 and working through the four stages again. However, you can make the learning process even more meaningful by applying the concept of 'double loop learning', which was developed by Argyris and Schon.

Most people learn by feedback or single loop learning. We attempt to learn using existing strategies, get a result and if it isn't what we want, we adjust the learning or the strategy in the hope that we get a better result next time. Double loop learning challenges us to change underlying values and assumptions by asking questions such as:

- What am I trying to achieve?
- What is stopping me from achieving it?

- What can I do about it?
- Who knows what I am trying to achieve?
- Who else can do anything to help?

As you go through the *Pathways* workbooks, remember that:

- learning effectively involves you going through a series of stages
- the material in the workbooks will take you through each of these stages
- it's important for you to complete all the stages – reading the theory, undertaking the activities, action planning and answering the self-assessment questions
- your preferred learning style(s) will have an impact on your approach to the stages
- you should have a balanced approach to learning (try not to allow your preferred styles to dominate)
- your use of workbooks should support the other sources of information and skills development from the tutors or trainers leading your Level 5 programme
- if you experience difficulties reflect and apply some of the principles of double loop learning.

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Getting organised

Your approved centre is likely to provide you with all the help and advice you need. You can use the checklist below to help you plan the practical steps that you can take to make a success of your studies.

Activity

Activity 4 (about 10 minutes)

Answer the questions below.

- How much time can I spend studying each week?
- Have I got a study plan (and have I agreed it with my tutor)?
- Have I got commitment from others to enable me to study effectively (and who are they)?
- Have I found the best place to study (and where is this)?
- Have I organised myself to study?
- Anything else?

Feedback

■ How much time can I spend studying each week?

Whether you are studying in a classroom-based programme at college, an in-company programme or by distance or online learning, you may well be working during the day and studying mostly in the early morning, evening or weekends. You will almost certainly be studying in your own time, which means that you will probably need to schedule around three to five hours of study per week. Determine how much time you need to study and can commit on a week-to-week basis, and then plan that time into your work and social diary. Don't forget to include time for any additional reading or study and preparing your assessments.

■ Have I got a study plan?

It's important to agree a study plan with your tutor or trainer and to try to stick to it. Your plan should contain clear tasks and objectives. Make sure you reach certain milestones in your plan at the right time. Reward yourself each time you hit one. Break your studying down into

manageable chunks: the workbooks will help you considerably in this respect with sections being around two hours in duration. Plan to start and complete each section in one study session. When you set your objectives, it helps to create objectives that are SMART – specific, measurable, achievable, realistic and timebound. A worked example would look like this: 'By the end of December, I will have completed my studies for the first unit, and have submitted the assignment.' Check your progress regularly with your tutor and review your work/life/study balance with family and friends.

■ *Have I got commitment from others?*

If you are studying at home, make sure that your family and friends know that you are studying and tell them when you won't be available. At work, employ the same tactics: if possible, leave your desk and try to find a meeting room where you can work undisturbed. Make sure your line manager and colleagues know what you are doing and agree with them in what circumstances you can be interrupted.

■ *Have I found the best place to study?*

Whether you are studying at home or at work, find a space where you will be comfortable and have access to all of the resources you will need. At times you will need access to your workbooks, study material and a computer. If it helps, put up a 'Please do not disturb' sign.

■ *Have I organised myself to study?*

Find a secure place to store your study materials, sample documents, notes, assignments, etc. Over the course of your studies, you will gather a lot of information, so start with an effective filing system (the most appropriate is to keep things together by unit title). A separate notebook for key activities, notes and records is recommended, particularly to help prepare for the assessment. Finally, have a good source of paper, pens, pencils, highlighter pens, etc.

You should go through your checklist with your tutor and try to address any outstanding issues.

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Support from the Chartered Management Institute

In addition to the advice and guidance that will be provided by your approved centre, CMI has its own resources for students which can be located by visiting the CMI's online ManagementDirect management and leadership portal at <http://mde.managers.org.uk/members>. Study Support can be found by clicking on the Study Support tab located underneath the ManagementDirect search box.

As part of your registration for this programme, you are automatically enrolled as a studying member of the Chartered Management Institute, and have access to study resources at <http://mde.managers.org.uk/members>

The study resources contain a range of materials which we have brought together to help you with your studies and research. Examples include:

- general resources such as factsheets, e books, journal articles and learning tools
- Level 5 resources such as checklists and reading lists of direct relevance to each unit of the qualification

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