

# Royal Fleet Auxiliary (RFA) Management and Leadership Course

Completion Pack October 2024  
Version 3

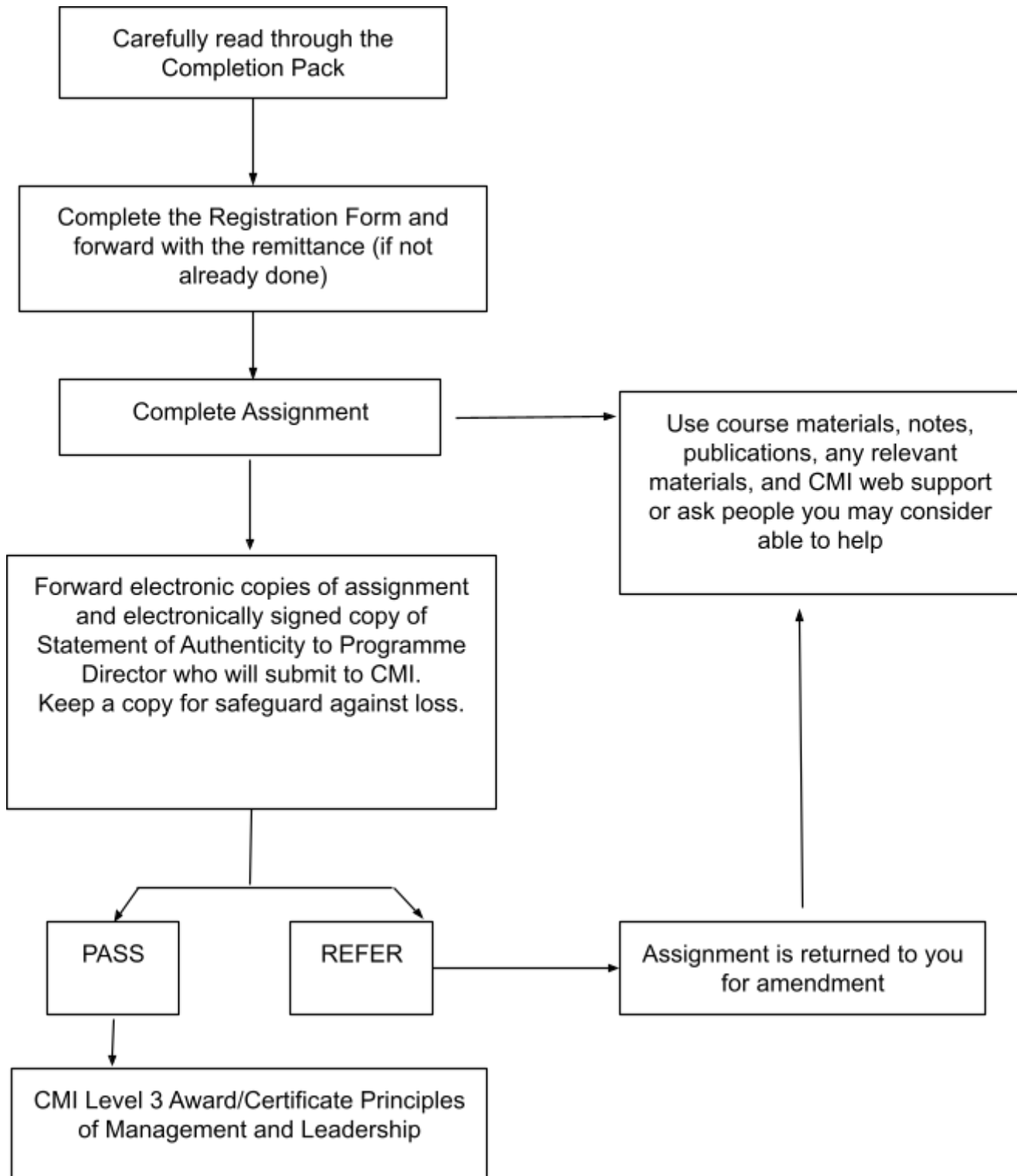
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## CONTENTS

Completion Process Overview	03
Introduction	04
Support for Gaining CMI Qualification	05
Unit Completion	06
Qualification Registration	06
Submission of Assignment	07
Assessment Guidance for Learners	07
Assessment Guidance	08
Plagiarism & Collusion	08
Appendices	09
Confidentiality	09
Word Count Policy	09
Reference & Professionalism	09
Instructions & Information for Learners	09
Assignment Briefs	11
Statement of Authenticity	37
Qualification Unit 303	38
Qualification Unit 304	41
Qualification Unit 319	44

## COMPLETION PROCESS OVERVIEW - Qualification



## INTRODUCTION

The Chartered Management Institute (CMI) has undertaken detailed mapping of the MOD service courses with a view to recognising them against nationally recognised qualifications. CMI has fully recognised that your course meets some of the requirements for the CMI Level 3 Award in Principles of Management and Leadership or the CMI Level 3 Certificate in Principles of Management and Leadership.

- The CMI Level 3 Award in Principles of Management and Leadership comprises one of the following units, 303, 304 or 319 to a minimum of 40 TQT.
- The CMI Level 3 Certificate in Principles of Management and Leadership can be achieved by completing and submitting the following assignments 303, 304 & 319 that total 140 TQT.

Note: You may register for this qualification but this must be clearly indicated on the Registration Form. Combining qualifications will increase personal cost, though this may be substantially reduced if SLCs can be used.

**To acquire the CMI Level 3 Award in Principles of Management and Leadership, you must complete and submit one of the following assignments (303, 304 or 319), comprising a number of tasks, as contained in this completion pack.**

**To acquire the CMI Level 3 Certificate in Principles of Management and Leadership, you must complete and submit the following assignments (303, 304 & 319), comprising a number of tasks, as contained in this completion pack.**

The qualifications are immediately transferable to, and acknowledged by, the civilian business world as a benchmark qualification expected for a team leading management position. The qualifications are commended to all students as an extremely valuable addition to your in-service qualifications.

### Qualification Registration Duration

Qualification Structure	Period of Registration
Award	Up to 12 Months
Certificate	Up to 36 Months
Diploma	Up to 36 Months
Extended Diploma	Up to 36 Months

**It is very important that you contact CMI by telephone: +44 (0) 1536 207496 before this time if you are encountering difficulties (see below).**

**There are no refunds for lapsed candidates.**

This CMI qualification Completion Pack provides you with the support information you need for the External Assignment.

For the duration of your qualification programme you receive complimentary 'Affiliate Membership' of CMI, enabling you to access a wide range of support material on the CMI website and ManagementDirect. If you are already a member you cannot claim a refund of membership fees.

NOTE: If you have not previously registered on the CMI Website you now need to do so using the information contained in your CMI Welcome Letter.

We ask where possible for you to access on personal devices and networks to prevent any issues with MOD security and firewalls.

How do I get started and access my learning resources?

1. Click [here](#) to set your password
2. Follow the on-screen instructions
3. Click [here](#) to access ManagementDirect
4. Username is the email as registered with CMI

Once logged in to ManagementDirect, use the following steps to access support for:

### Unit 303

- Opening Screen - Click on Qualification Support\* for Level 3 Award or Certificate in Principles of Management and Leadership
- Next Screen - Click View Qualification
- Next Screen - Scroll to find Unit 303
- Select 'Mapped Resources to Learning Outcomes (LOs)' or Key Resources

### Unit 303

- Opening Screen - Click on Qualification Support\* for Level 3 Award or Certificate in Principles of Management and Leadership
- Next Screen - Click View Qualification
- Next Screen - Scroll to find Unit 303
- Select 'Mapped Resources to Learning Outcomes (LOs)' or Key Resources

### Unit 304

- Opening Screen - Click on Qualification Support\* for Level 3 Award or Certificate in Principles of Management and Leadership
- Next Screen - Click View Qualification
- Next Screen - Scroll to find Unit 304
- Select 'Mapped Resources to Learning Outcomes (LOs)' or Key Resources

### Unit 319

- Opening Screen - Click on Qualification Support\* for Level 3 Award or Certificate in Principles of Management and Leadership
- Next Screen - Click View Qualification
- Next Screen - Scroll to find Unit 319
- Select 'Mapped Resources to Learning Outcomes (LOs)' or Key Resources

Between the LOs there are links to 'View Resources'. By 'clicking' these open you will find comprehensive support for the appropriate LO. Resources include documents, checklists, video clips and recommended reading. Note that there may be some duplication of resource references as the LOs are interrelated.

\*If you do not have a link to Qualification Support please contact the team (see below)

**Unsure about anything?**

Please contact CMI on: +44 (0) 1536 207496 during office hours (0900-1700 hours Monday to Friday), or [mod.qualifications@managers.org.uk](mailto:mod.qualifications@managers.org.uk)

## UNIT COMPLETION REQUIREMENTS

You are required to complete one unit assignment to obtain the 'standalone' CMI Level 3 Award in Principles of Management and Leadership, or three unit assignments to obtain the 'standalone' CMI Level 3 Certificate in Principles of Management and Leadership.

Guidance on completing the assignment and submitting your work to CMI are on the following pages. You are also encouraged to submit a reflective statement of no more than 300 words (in addition to the assignment word count) describing the value and knowledge gained from undertaking the assignment. This statement will not be assessed; however it encourages you to review the value and application of your learning.

You are required to complete **one** of the following assignments to obtain the 'standalone' CMI Level 3 Award in Principles of Management and Leadership -

<b>CMI Level 3 Award in Principles of Management and Leadership</b>	<b>Credits</b>	<b>Actions</b>
Unit 303 - Managing Individuals to be Effective in their Role	5	Register and pass additional assignment
Unit 304 - Principles of Communication in the Workplace	5	Register and pass additional assignment
Unit 319 - Managing Meetings	4	Register and pass additional assignment

You are required to complete **all three unit** assignments below to obtain the 'standalone' CMI Level 3 Certificate in Principles of Management and Leadership -

<b>CMI Level 3 Certificate in Principles of Management and Leadership</b>	<b>Credits</b>	<b>Actions</b>
Unit 303 - Managing Individuals to be Effective in their Role	5	Register and pass additional assignment
Unit 304 - Principles of Communication in the Workplace	5	Register and pass additional assignment
Unit 319 - Managing Meetings	4	Register and pass additional assignment

## QUALIFICATION REGISTRATION

If you have not already done so, you need to register for each of your selected qualifications. All registration forms must be accompanied by evidence that you have successfully completed your RFA Management and Leadership course (copy of the relevant section of your end of course certificate signed off by an officer of SO2 rank), and the requisite remittance (cheque or credit card details). Send this to the CMI at the address shown on the form.



## SUBMISSION OF ASSIGNMENTS

Submitting your work for either:

CMI Level 3 Award in Principles of Management and Leadership

CMI Level 3 Certificate in Principles of Management and Leadership

Once you have completed an assignment, you must forward it, along with a signed copy of the Statement of Authenticity (as a single file with your completed Statement of Authenticity as the first page) by e-mail to the Programme Director. The assignment must not exceed a file size of 5MB. File name should include the following: name, P number, unit and submission number i.e. Assignment Blogs\_P123456\_Unit\_number\_submission number.

You are strongly advised to keep a copy of your assignment to safeguard against loss; your assignment will not be returned to you but will be destroyed by safe and confidential means.

Please note that CMI does offer a paper based assessment service for learners who are unable to provide an electronic copy. Post the assignment along with your signed Statement of Authenticity to:

External Assignments/MOD,  
Awarding Body,  
Management House,  
Cottingham Road,  
Corby,  
Northamptonshire NN17 1TT.

**PASS:** If a pass is achieved, CMI will issue you with your qualification certification and your units / credit certificate along with an offer of graded membership of the Chartered Management Institute. This level of membership may be lower than that offered by the MOD guaranteed membership scheme – you can opt for either.

**REFERRAL:** If your assignment does not meet the pass standard, it will be returned to you with guidance notes for completion. You must meet the additional requirements before re-submitting the assignment. You will be allowed one further re-submission (i.e. 2 in total).

**Following two Referrals for your assignment, a Resubmission Fee of £20 (+ VAT) will be payable to CMI before work is reassessed. For more information please contact [ea.marking@managers.org.uk](mailto:ea.marking@managers.org.uk) or call 01536 207496 option 1.**

## ASSESSMENT GUIDANCE FOR LEARNERS

CMI provides a comprehensive external quality assessment service. Currently all units within the Management and Leadership qualifications from Level 2 to 7 have an assignment brief available.

CMI provides a six week service level on all assignments received.

Learners are required to complete all tasks and Assessment Criteria.

## ASSESSMENT GUIDANCE

All work must be submitted in a single electronic document (.doc file). The document must be marked with the learners name, number and unit number. Electronic assignments should be sent to **the Programme Director**.

Please note CMI do offer a paper based assignment service for learners that are unable to provide an electronic copy only. Please post the assignment to External Assignments, Awarding Body, Management House, Cottingham Road, Corby, Northamptonshire, NN17 1TT.

The assignment should be your own work and not direct copies of theories or models. Any models described and other quotes used must be properly attributed and referenced as appropriate. Learners must acknowledge or reference any sources that have been used to complete the assignment, listing reference material and web sites used, appendices must not be included.

Learners are encouraged to produce a reflective statement of no more than 300 words (which does not count towards the final word count), describing the value and knowledge gained from undertaking this assignment. The reflective statement is not assessed; however it encourages you to review the value and application of your learning.

## PLAGIARISM & COLLUSION

In submitting the assignment the learner must complete a statement of authenticity (included in the Completion Pack) confirming that the work submitted for all tasks is their own and does not contravene CMI policies including word count and plagiarism.

Academic offences, including plagiarism and collusion, are treated very seriously. Plagiarism involves presenting work, excerpts, ideas or passages of another author without appropriate referencing and attribution. Collusion occurs when two or more learners submit work which is so alike in ideas, content, wording and/or structure that the similarity goes beyond what might have been mere coincidence. Plagiarism and collusion are very serious offences and any learner found to be copying another learner's work or quoting work from another source without recognising and disclosing that source will be penalised.

In submitting their assignment for the unit, and completing the relevant statement of authenticity, learners are confirming that the work submitted for all tasks is their own and does not contravene the CMI policies including word count, plagiarism and collusion. CMI reserves the right to return assignments if the necessary statements of authenticity have not been completed.

Learners found to be in breach of these regulations will be reported to the relevant CMI contact for deliberation. The learner will be notified in writing of the outcome of the investigation. In the event that a learner is found to have perpetrated malpractice, the learner will be withdrawn from his/her qualification immediately; fees will not be refunded, the relevant Regulatory Body will be informed and membership of the CMI will be withdrawn.

## APPENDICES

Appendices should not be included. All use of tables, graphs, diagrams, Gantt charts and flowcharts should be incorporated into the main text of the assignment. Any published secondary information such as annual reports and company literature, should be referenced in the main text of the assignment but not included.

## CONFIDENTIALITY

Where learners are using organisational information that deals with sensitive material or issues, they must seek the advice and permission from that organisation about its inclusion in an assignment. Where confidentiality is an issue, studying members are advised to anonymise their assignment so that it cannot be attributed to that particular organisation.

## WORD COUNT POLICY

In total, it is required that your assignment should be between 2000-2500 words. Learners must comply with the required word count, within a margin of +10%. These rules exclude the index (if used), headings, information contained within references and bibliographies. When an assessment task requires learners to produce presentation slides with supporting notes, the word count applies to the supporting notes only.

Where a learner's work has contravened the word count policy, it will be reviewed by the Marker and Lead Moderator before a final decision is made.

## REFERENCING & PROFESSIONALISM

A professional approach to work is expected from all learners. Learners must therefore identify and acknowledge ALL sources/methodologies/applications used. The learner must use an appropriate referencing system to achieve this. Whilst marks are not awarded for the use of English, the learner must express ideas clearly, succinctly, and ensure that appropriate terminology is used to convey accuracy in meaning.

## INSTRUCTIONS & INFORMATION FOR LEARNERS

The external assignment is set and assessed by the Chartered Management Institute. It is designed to assess your achievement of all the Learning Outcomes and associated assessment criteria in the relevant unit of the qualification you are undertaking.

You should make sure that you plan your work carefully, to ensure that you cover all the requirements of the assignment, and complete it within the time limit specified.

Your statements, in answer to the tasks, need to be prefixed with the specific task number and unit title. This will help you keep on track and should ensure you address the details. Work submitted without a task prefix will be returned unmarked. Your statements should not be just a description of workplace activities but should include what you have learned from your programme of study. In other words you need to show how you can relate what you have learned to day-to-day management activities.

You must submit your work as a single electronic word document (.doc file). You should mark the assignment with your name, learner number, the unit number, your Centre name – Royal Fleet Auxiliary (RFA) - and a brief description of the context in which the assignment was undertaken. You may include a title page if you wish. You must show a total word count on the front page of your assignment. You are strongly advised to keep a copy of your completed assignment before you submit it for assessment –

the copy you submit will not be returned to you. Your assignment may be kept by the CMI for quality assurance purposes. Any assignment not kept for quality assurance will be securely destroyed.

CMI will assess your assignment, and the result will be sent to you, normally within 6 weeks of receipt by the Institute.

If your assignment is assessed as referred, notification will be sent to you with an indication of the areas to be addressed. You may resubmit an assignment on a further two occasions during your period of registration as a CMI learner.

If there is anything in these instructions or in the assignment itself which you do not understand, please seek guidance from CMI by phone on 01536 207496.

### UNIT 303

#### Assignment Brief: Managing Individuals to be Effective in their Role

Click [here](#) to download the Assignment Brief.

Each task in this assessment booklet has been developed to enable you to evidence achievement of the learning outcomes and assessment criteria for **CMI 303: Managing Individuals to be Effective in their Role**. Each of the assessment criteria must gain a pass outcome for you to successfully achieve the unit.

##### Preparation for the assessment

- Before you begin the assessment booklet please read the **CMI 303** unit specification thoroughly as only the content related to the achievement of the assessment criteria will be assessed.
- Research the topics being assessed. Suggested reading/web resources are provided on the **CMI 303** unit specification. Your tutor may signpost you to relevant resources. Additionally you may access excellent online resources at ManagementDirect <https://members.md.cmi.org.uk> Please note that if you have a customised site the link will differ, please contact your Centre for clarification.
- If you are enrolled on the Trailblazer Apprenticeship programme you are encouraged to review the Apprenticeship Standard for Team Leader/Supervisor

##### Completing the assessment booklet

- The assessment booklet contains a series of tasks which are clearly referenced to the relevant assessment criteria and indicative content.
- Refer to the Assessment Guidance table at the end of the assessment booklet which outlines the requirements for a Pass or Refer.
- Evidence must be provided in the main body of the assignment booklet. Additional work based evidence such as plans or documentation (which has been referred to within the main text) should be included at the end of the booklet marked 'Work Based Evidence'. Appendices are not a requirement of this assessment brief. If appendices are included these will not be marked or moderated by the CMI.
- Work based evidence must be accompanied by a supporting statement in the learner evidence box, to explain the link to the assessment criteria. Work based evidence (where required by the task) must not exceed SIX (6) pages. Files embedded in the booklet must not exceed 10MB.
- The assessment booklet must be completed in a professional manner (e.g. applying business conventions for writing formal reports) and by using Microsoft Word, Rich Text Format or another compatible software programme.
- The assessment booklet must be saved as a word document (.doc or .docx) and not in a PDF format.
- An appropriate referencing system (such as Harvard Referencing) must be used to ensure the original source(s) of quotations or models can be verified.
- Finally, you must sign the Learner Authenticity statement (an electronic signature is accepted).

##### Learner support

For information regarding policies and procedures for assessment (e.g. special assessment arrangements, learner support, appeals, complaints, certification, confidentiality, plagiarism) you

should contact your tutor or Centre manager and refer to the CMI Level 3 in Principles in Management and Leadership Syllabus.

## LEARNER INFORMATION

<b>Learner name:</b>		<b>Learner no:</b>		<b>Centre name:</b>	
<b>Date:</b>		<b>Batch no:</b>		<b>Qualification:</b>	

<b>Learner statement of authenticity:</b>	I confirm that the attached completed assignment is all my own work, and does not include any work completed by anyone other than myself. I have completed the assignment in accordance with the Institute's approved instructions.
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	Tick here to opt out	I consent for this assignment to be used for assessment standardisation and where appropriate, for the dissemination of good practice, on the understanding that the content is anonymised.
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<b>Signed:</b>		<b>Date:</b>	
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<b>Centre statement of authenticity:</b>	On behalf of <CENTRE NAME>, I confirm that the above mentioned learner is registered at the centre on a Chartered Management Institute (CMI) programme of study. The candidate is, to the best of my knowledge, the sole author of the completed assignment.		
<b>Name:</b>		<b>Job Title:</b>	
<b>Signed:</b>		<b>Date:</b>	

## GUIDELINE WORD COUNT

The written word, however generated and recorded, is still expected to form the majority of assessable work produced by Learners at Level 3. The amount and volume of work for this unit should be broadly comparable to a word count of 2000-2500 words within a margin of +/-10%. The excessive use of word count is not grounds for referral, however the CMI reserves the right to return work to the Centre for editing and resubmission by the Learner.

The following are excluded from inclusion in word count if used and not required by the assessment brief an introduction to a job role, organisation or department, index or contents pages, headings and subheadings, diagrams, charts and graphs, reference list or bibliography, reflective statement drawn from undertaking the assignment and how this has impacted the learners work.

Please see the CMI Assessment Guidance Policy for further guidance.

## AIM OF THE ASSESSMENT BOOKLET

High performing individuals impact on the performance of teams and the organisation. The aim of this assessment booklet is to enable managers to evidence their understanding of how to use their knowledge, skills and abilities to support individuals, not only to perform well, but to exceed expectations.

### TASK 1: Understanding an individual's work role and responsibilities

*The starting point to being effective in a management position is to fully understand the roles and responsibilities of the individuals you manage.*

*To complete Tasks 1a and b you are encouraged to use well-chosen examples from an organisation/team you know well or have researched.*

#### TASK 1A

Using examples, explain the different **sources of information** which state an individual's work role and responsibilities.

*(Refer to AC1.1 Explain the **sources of information** which state an individual's work role and responsibilities and the Indicative Content for this AC)*

INSERT YOUR ANSWER HERE:

#### TASK 1B

Explain **THREE (3) reasons** for assessing the knowledge, skills and behaviours of an individual in their work role.

*(Refer to AC1.2 Explain the **reasons** for assessing an individuals' knowledge, skills and behaviours in a work role and the Indicative Content for this AC)*

INSERT YOUR ANSWER HERE:

1	
2	
3	

### TASK 2: Setting objectives with individuals

Objective setting enables individuals to understand the expectations of their role giving them an understanding of what needs to be done to succeed and make a positive contribution to the team.

## SCENARIO A

You are managing a small team of six (6) people within a large organisation. Your team has responsibility for delivering customer service and comprises individuals with a range of skills and experience. They carry out their work in the same location and you have regular contact with them.

Scenario A can be used to answer Tasks 2a, b and c. Alternatively, you may choose to use well-chosen examples from an organisation you know well or have researched.

## TASK 2A

Explain **THREE (3) methods** you would use to set **objectives** for the individuals in your team.

(Refer to AC2.1 Explain the **methods** used to set **objectives** for individuals and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE:

1	
2	
3	

## TASK 2B

Explain how you would assess an individual's **capability** to achieve the objectives set.

(Refer to AC2.2 Explain how to assess an individual's **capability** to achieve objectives and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE:

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## TASK 2C

Individuals in a team take ownership of their objectives when they feel they have been fully involved in the process to set and agree them.

Outline the **process** you would use to involve individuals you manage in agreeing clear work objectives.

(Refer to AC2.3 Outline the **process** for involving individuals in agreeing clear objectives and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE:



### TASK 3: Supporting individuals to perform well

*Supporting and motivating individuals to perform well is essential to enabling them to achieve their full potential.*

*To complete Task 3a you are encouraged to use well-chosen examples from an organisation/team you know well or have researched.*

#### TASK 3A

From the following list choose **THREE (3) support methods** and outline how these can enable individuals to perform well.

<i>Informal and formal personal and professional development</i>	<i>Delegation and allocation of responsibility</i>	<i>Setting clear expectations</i>	<i>Reviewing progress</i>	<i>Constructive feedback</i>
<i>Supervision</i>	<i>Coaching</i>	<i>Mentoring</i>	<i>Training</i>	<i>Development activities</i>

*(Refer to [AC3.1 Outline a range of support methods to enable individuals to perform well](#) and the Indicative Content for this AC)*

#### COMPLETE THE TABLE

	Support method	Outline how the method enables individuals to perform well
1		
2		
3		

#### SCENARIO B

*You have just started managing a new team. The work the team carries out is very repetitive and process driven. The work isn't very exciting and whilst targets are met, these are never exceeded.*

*There are seven team members, four of which have worked for the company for more than ten years and despite having the ability to progress, have chosen to stay in the team as it suits their personal circumstances.*

There have been recurrent problems recruiting the seventh team member and recently a talented new recruit left after a few months as the role didn't match their expectations. Their replacement starts on Monday.

You need to consider how to motivate and incentivise the individuals in the team to perform well whilst being objective in the decisions you make.

Scenario B can be used to answer Task 3b, 3c and 3d. Alternatively, you may choose to use well-chosen examples from an organisation you know well or have researched.

### TASK 3B

Using examples, identify **TWO (2) approaches for motivating** the individuals in their work role.

(Refer to [AC3.2 Identify approaches for motivating individuals in their work role](#) and the Indicative Content for this AC)

#### COMPLETE THE TABLE

	Approaches for motivating individuals in their work role
1	
2	

### TASK 3C

Explain how the achievement of individuals can be **incentivised**.

(Refer to [AC3.3 Explain how an individual's achievement can be incentivised](#) and the Indicative Content for this AC)

#### INSERT YOUR ANSWER HERE

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### TASK 3D

Individuals have a right to be treated fairly and without bias, yet it can be human nature to favour individuals you manage over others, and make decisions or judgements which are not based on fact.

Using examples, explain the importance of managing individuals **objectively**.

(Refer to [AC3.4 Explain the importance of managing individuals objectively](#) and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE

#### TASK 4: Assessing outcomes against objectives

*There are a wide range of approaches and tools which may be used to assess an individual's outcomes against objectives.*

*To complete each task you are encouraged to use well-chosen examples to illustrate how the use of tools and approaches for measuring performance/outcomes can be applied in the workplace.*

##### TASK 4A

Knowing how to assess outcomes against objectives is essential to judge the effectiveness of an individual's performance.

Complete the following table by summarising how each of the **tools** listed can be used to review an individual's performance.

*(Refer to AC4.1 Summarise the **tools** that may be used to review an individual's performance and the Indicative Content for this AC)*

##### COMPLETE THE TABLE

Tools	Summary
<i>Appraisal</i>	
<i>Personal development review</i>	
<i>360 degree feedback</i>	
<i>Customer feedback</i>	
<i>Observation</i>	

##### TASK 4B

To complete this task you are required to outline **approaches** to measuring outcomes against objectives. You can either:

- identify a set objective within in an area of work with which you are familiar

OR

- use **ONE (1)** of the suggested objectives outlined below

<b>Example 1: Call handling</b>	<i>Calls must be answered within three rings</i>
<b>Example 2: Customer service</b>	<i>Enquiries must be answered promptly and courteously by you or, if you do not know the answer, you must pass the customer on to a knowledgeable colleague</i>
<b>Example 3: Production</b>	<i>Wastage must be reduced by 5 percent within the next three months</i>
<b>Example 4: Administration</b>	<i>Re-ordering of supplies must be completed within the allocated budget</i>
<b>Example 5: Finance</b>	<i>A report showing weekly costs must be sent to the head of department at the end of every month</i>

(Refer to AC4.2 Outline **approaches** to measuring outcomes against objectives and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE

## TASK 5: Managing the underperformance of individuals

Managers must not shy away from tackling the underperformance of individuals within their team. However, it is important for a first line manager to understand legal and organisational policies and procedures and to know how to manage underperformance.

### SCENARIO C

You have recently been appointed as a manager and are responsible for **FOUR (4)** staff members. You soon become aware that one individual seems to be very demotivated. They are reluctant to contribute to team meetings and have missed a number of important deadlines. Most recently, they have started to arrive late for work. Some team members have also noticed the change in behaviour.

Scenario C can be used to answer Task 5. Alternatively, you may choose to use well-chosen examples based on research or your experience of managing performance in the workplace.

### TASK 5

Explain **THREE (3)** ways to manage the underperformance of an individual within the limits of your own authority.

(Refer to AC 5.1 Explain how to **manage the underperformance** of an individual within the limits of own authority and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE

1	
2	
3	

## REFERENCING AND BIBLIOGRAPHY

Use the box below to cite any external sources used in your assessment:

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## ASSESSMENT GUIDANCE

Refer	Pass
<ul style="list-style-type: none"> <li>The submission is incomplete</li> <li>Tasks are incomplete</li> <li>Not all assessment criteria have been met</li> <li>No examples are used or the examples given do not match the requirements of the assessment criteria</li> <li>Evidence is               <ul style="list-style-type: none"> <li>Unclear</li> <li>Technically incorrect or inaccurate</li> <li>Biased</li> <li>Unprofessional language</li> <li>Poorly structured and presented</li> <li>Ideas are underdeveloped</li> <li>Lacks sufficient detail to show understanding of the topic</li> </ul> </li> <li>The application of concepts, models and theories to the management and leadership role or workplace is unclear</li> <li>Evidence is not directly attributable to the learner</li> <li>External sources of information are not acknowledged</li> <li>Work based evidence or artefacts (e.g. planning documents or presentation slides)</li> </ul>	<ul style="list-style-type: none"> <li>All tasks have been completed</li> <li>All assessment criteria have been met</li> <li>Examples given are well chosen and match the requirements of the assessment criteria</li> <li>Evidence is               <ul style="list-style-type: none"> <li>Well written and presented</li> <li>Contains a breadth of examples</li> <li>Accurate</li> <li>Current (e.g. use of up to date legislation)</li> <li>Authentic</li> <li>Inclusive</li> <li>Coherent</li> <li>Credible</li> <li>Technically correct</li> </ul> </li> <li>Evidence shows an understanding of different perspectives</li> <li>Concepts, models and approaches and have been applied correctly in context of the management and leadership role or workplace</li> <li>Evidence used from external sources has been correctly referenced</li> </ul>

<p>do not meet the requirements of the assessment criteria and is not current (within 5 years)</p>	<ul style="list-style-type: none"> <li>• Evidence is directly attributable to the learner</li> <li>• Work based evidence or artefacts (e.g. planning documents or presentation slides) match the requirements of the assessment criteria and is current (within 5 years)</li> </ul>
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**Assignment Brief: Principles of Communication in the Workplace**

Click [here](#) to download the Assignment Brief.

Each task in this assessment booklet has been developed to enable you to evidence achievement of the learning outcomes and assessment criteria for **CMI 304: Principles of Communication in the Workplace**. Each of the assessment criteria must gain a pass outcome for you to successfully achieve the unit.

**Preparation for the assessment**

- Before you begin the assessment booklet please read the **CMI 304** unit specification thoroughly as only the content related to the achievement of the assessment criteria will be assessed.
- Research the topics being assessed. Suggested reading/web resources are provided on the **CMI 304** unit specification. Your tutor may signpost you to relevant resources. Additionally you may access excellent online resources at ManagementDirect <https://members.md.cmi.org.uk> Please note that if you have a customised site the link will differ, please contact your Centre for clarification.
- If you are enrolled on the Trailblazer Apprenticeship programme you are encouraged to review the Apprenticeship Standard for Team Leader/Supervisor

**Completing the assessment booklet**

- The assessment booklet contains a series of tasks which are clearly referenced to the relevant assessment criteria and indicative content.
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- Evidence must be provided in the main body of the assignment booklet. Additional work based evidence such as plans or documentation (which has been referred to within the main text) should be included at the end of the booklet marked 'Work Based Evidence'. Appendices are not a requirement of this assessment brief. If appendices are included these will not be marked or moderated by the CMI.
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- The assessment booklet must be saved as a word document (.doc or .docx) and not in a PDF format.
- An appropriate referencing system (such as Harvard Referencing) must be used to ensure the original source(s) of quotations or models can be verified.
- Finally, you must sign the Learner Authenticity statement (an electronic signature is accepted).

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## LEARNER INFORMATION

<b>Learner name:</b>		<b>Learner no:</b>		<b>Centre name:</b>	
<b>Date:</b>		<b>Batch no:</b>		<b>Qualification:</b>	

<b>Learner statement of authenticity:</b>	I confirm that the attached completed assignment is all my own work, and does not include any work completed by anyone other than myself. I have completed the assignment in accordance with the Institute's approved instructions.
---	---

	Tick here to opt out	I consent for this assignment to be used for assessment standardisation and where appropriate, for the dissemination of good practice, on the understanding that the content is anonymised.
--	----------------------	---

<b>Signed:</b>		<b>Date:</b>	
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<b>Centre statement of authenticity:</b>	On behalf of <CENTRE NAME>, I confirm that the above mentioned learner is registered at the centre on a Chartered Management Institute (CMI) programme of study. The candidate is, to the best of my knowledge, the sole author of the completed assignment.		
<b>Name:</b>		<b>Job Title:</b>	
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## GUIDELINE WORD COUNT

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Please see the CMI Assessment Guidance Policy for further guidance.



## AIM OF THE ASSESSMENT BOOKLET

As the range of communication tools used by an organisation continues to grow, and new technologies emerge, managers are faced with the challenge of how to select and use different tools to ensure that communication is effective, timely and has impact. The aim of this unit is to equip managers with the knowledge and skills to select and use a range of workplace communication methods. These must be measurable and tailored to the needs of the target audience.

### TASK 1: Channels and types of communication used in the workplace

*This task provides the manager with an understanding of the importance of effective communication in the workplace, the channels that could be used and the impact of legal and organisational policies on their use.*

*To complete tasks 1a, b, c and d you are encouraged to use well-chosen examples from an organisation/team you know well or have researched.*

#### TASK 1A

In your own words, explain the **importance** of effective communication in the workplace.

*(Refer to AC1.1 Explain the importance of effective communication in the workplace and the Indicative Content for this AC)*

INSERT YOUR ANSWER HERE

#### TASK 1B

Identify **channels** of communication used in the workplace.

*(Refer to AC1.2 Identify channels of communication used in the workplace and the Indicative Content for this AC)*

INSERT YOUR ANSWER HERE

#### TASK 1C

Using examples, assess the strengths and weaknesses of **THREE (3) types** of communication used in the workplace.

(Refer to AC1.3 Assess strengths and weaknesses of different **types** of communication used in the workplace and the Indicative Content for this AC)

**COMPLETE THE TABLE**

	Communication type	Strengths	Weaknesses
1			
2			
3			

**TASK 1D**

Summarise **TWO (2) legal requirements** and **TWO (2) organisational policies** that affect the use of the different types of communication in the workplace.

(Refer to AC1.4 Summarise **legal requirements** and **organisational policies** that affect the use of the different types of communication in the workplace and the Indicative Content for this AC)

**COMPLETE THE TABLE**

Legal Requirements	
1	
2	

Organisational policies	
1	
2	

**TASK 2: The communication cycle**

*This task focuses on the communication cycle, barriers to communication and how these can be overcome.*

*To complete tasks 2a and b you are encouraged to use well-chosen examples from an organisation/team you know well or have researched.*

**TASK 2A**

Explain the **communication cycle** and its application in the workplace. *You may include a diagram to support your answer for this task.*

(Refer to AC2.1 Explain the **communication cycle** and its application in the workplace and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE

## INTERVIEW

*"It is a challenge to communicate with others in a busy office. The environment is often noisy, there isn't much privacy and there are constant interruptions from colleagues.*

*Using email can be problematic. Data and information volumes are overwhelming which isn't helped by being needlessly copied into emails sent. The tone of some emails is very abrupt and this is mirrored by the unprofessional way some in the office use to talk to one another. Recently a member of the team was given a warning for their use of inappropriate language and the way they had mimicked a customer's accent.*

*I am sure we could communicate more effectively as a team, there is some interesting new technology that would be great to try."*

*A. Manager 2017*

*To complete Task 2b, use this transcript of an interview with a manager who works in a large team in an open plan office. Alternatively, you may wish to base your response on a team you know well or have researched.*

## TASK 2B

Explain **THREE (3) barriers** to effective communication that may occur when communicating and explain how these can be **overcome**.

*(Refer to [AC2.2 Explain barriers to effective communication](#); [AC 2.3 Explain ways to overcome barriers to communication](#) and the Indicative Content for this AC)*

### COMPLETE THE TABLE

	Barriers to communication	Ways to overcome the communication barrier
1		
2		
3		

### TASK 3: Planning communication for a target audience

This task has been designed to enable you to plan communication with a target audience.

#### MINI SCENARIOS

<b>Mini scenario 1</b>	<i>You are required to present a case for employing additional staff to an audience of middle managers.</i>
<b>Mini scenario 2</b>	<i>You are required to introduce a new working process to your team of four staff. Three team members work on site, one team member works remotely.</i>
<b>Mini scenario 3</b>	<i>You are required to present a case for employing additional staff to an audience of middle managers.</i>
<b>Mini scenario 4</b>	<i>You have an appointment to meet with a potential new customer who is interested in the goods and services your organisation offers.</i>
<b>Mini scenario 5</b>	<i>You want to have a confidential discussion with a member of your team regarding the opportunity for them to mentor a new member of staff.</i>

To complete this Task you are required to choose **ONE (1)** of the mini-scenarios shown above. Alternatively, you may choose to use an example of how you plan communication with a target audience in your own area of work.

#### TASK 3

Using an example, explain the **planning** process for communicating with a **target audience**.

(Refer to AC3.1 Explain the **planning** process for communicating with a **target audience** and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE

### TASK 4: Measure the effectiveness of communication with a target audience

It is important to measure the effectiveness of communication with a target audience to judge the success of the approach used.

To complete this Task you may base your response on the example selected for Task 3. Alternatively, you may choose to base your response on your own example of how you plan communication with a target audience in your own area of work.

#### TASK 4

Assess **THREE (3)** ways of **measuring** the effectiveness of communication with a target audience.

(Refer to AC4.1 Assess ways of **measuring** the effectiveness of communication with a target audience and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE

1	
2	
3	

## REFERENCING AND BIBLIOGRAPHY

Use the box below to cite any external sources used in your assessment:

## ASSESSMENT GUIDANCE

Refer	Pass
<ul style="list-style-type: none"> <li>• The submission is incomplete</li> <li>• Tasks are incomplete</li> <li>• Not all assessment criteria have been met</li> <li>• No examples are used or the examples given do not match the requirements of the assessment criteria</li> <li>• Evidence is <ul style="list-style-type: none"> <li>• Unclear</li> <li>• Technically incorrect or inaccurate</li> <li>• Biased</li> <li>• Unprofessional language</li> <li>• Poorly structured and presented</li> <li>• Ideas are underdeveloped</li> <li>• Lacks sufficient detail to show understanding of the topic</li> </ul> </li> <li>• The application of concepts, models and theories to the management and leadership role or workplace is unclear</li> <li>• Evidence is not directly attributable to the learner</li> <li>• External sources of information are not acknowledged</li> <li>• Work based evidence or artefacts (e.g. planning documents or presentation slides)</li> </ul>	<ul style="list-style-type: none"> <li>• All tasks have been completed</li> <li>• All assessment criteria have been met</li> <li>• Examples given are well chosen and match the requirements of the assessment criteria</li> <li>• Evidence is <ul style="list-style-type: none"> <li>• Well written and presented</li> <li>• Contains a breadth of examples</li> <li>• Accurate</li> <li>• Current (e.g. use of up to date legislation)</li> <li>• Authentic</li> <li>• Inclusive</li> <li>• Coherent</li> <li>• Credible</li> <li>• Technically correct</li> </ul> </li> <li>• Evidence shows an understanding of different perspectives</li> <li>• Concepts, models and approaches and have been applied correctly in context of the management and leadership role or workplace</li> <li>• Evidence used from external sources has been correctly referenced</li> </ul>

<p>do not meet the requirements of the assessment criteria and is not current (within 5 years)</p>	<ul style="list-style-type: none"> <li>• Evidence is directly attributable to the learner</li> <li>• Work based evidence or artefacts (e.g. planning documents or presentation slides) match the requirements of the assessment criteria and is current (within 5 years)</li> </ul>
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**LEARNER INSTRUCTIONS**

Click [here](#) to download the Assignment Brief.

Each task in this assessment booklet has been developed to enable you to evidence achievement of the learning outcomes and assessment criteria for **CMI 319: Managing Meetings**. Each of the assessment criteria must gain a pass outcome for you to successfully achieve the unit.

**Preparation for the assessment**

- Before you begin the assessment booklet please read the **CMI 319** unit specification thoroughly as only the content related to the achievement of the assessment criteria will be assessed.
- Research the topics being assessed. Suggested reading/web resources are provided on the **CMI 319** unit specification. Your tutor may signpost you to relevant resources. Additionally, you may access excellent online resources at ManagementDirect <https://members.md.cmi.org.uk>. Please note that if you have a customised site the link will differ, please contact your Centre for clarification.
- If you are enrolled on the Trailblazer Apprenticeship programme you are encouraged to review the Apprenticeship Standard for Team Leader/Supervisor.

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## AIM OF THE ASSESSMENT BOOKLET

Managers are increasingly faced with days packed full of meetings that leave little time to get things done. Run well, meetings can be a place where issues are discussed, problems resolved, and decisions are made. However, all too often, meetings lack purpose and there is frustration if little has been achieved. The unit content has been designed to challenge traditional thinking. It aims to equip managers with the knowledge and tools to try different approaches when conducting meetings. It also explores good practice for preparing for and leading meetings, which have impact and also delivers results.

### TASK 1: The purpose and types of meetings

#### TASK 1A

*Meetings are usually held to give and receive information and make decisions.*

*Using examples, explain **THREE (3)** different purposes of meetings in organisational settings.*

*(Refer to [AC1.1 Explain the purposes of meetings](#) and the Indicative Content for this AC)*

INSERT YOUR ANSWER HERE:

1	
2	
3	

#### TASK 1B

There is a wide range of meeting types that can be used in organisational settings. Using examples, compare the similarities and differences between the following **types of meetings**:

<i>Formal meetings with informal meetings</i>	<i>Virtual meetings with face to face meetings</i>
---	--

*(Refer to [AC1.2 Compare different types of meetings](#) and the Indicative Content for this AC)*

COMPLETE THE TABLE

	Meeting type	Comparison
1	<i>Formal meetings with informal meetings</i>	
2	<i>Virtual meetings with face to face meetings</i>	

## TASK 1C

There are a wide variety of meetings a manager can select from, to meet the needs of a target audience. A manager must ensure that the meeting type selected is appropriate for its purpose and the intended audience.

Complete the table below by identifying the **factors** which must be considered when selecting the listed meetings for different audiences.

(Refer to AC1.3 Identify **factors** which need to be considered when selecting meeting types and the Indicative Content for this AC)

### COMPLETE THE TABLE

Meeting type	Factors to consider when selecting the meeting type
Virtual meetings (using video conferencing)	
Huddles	
One to one meetings	
Team meetings	
Time limited meetings	

## TASK 2: Preparing for meetings

Detailed preparation can optimise the success of a meeting. Preparation may include consideration of timings, attendees, roles and responsibilities, budget and resource requirements. There is also the need to ensure relevant information is given to participants in advance of the meeting.

To complete Task 2 you must choose one of the following options:

**Option A:** base your response on the scenario shown below.

**Option B:** base your response on two formal meetings you have planned within the workplace. One must be a face to face meeting. When choosing examples from the workplace you must ensure that each meeting has a clear purpose and be different in nature.

## SCENARIO

You are actively working towards the completion of a project and have been asked to plan two project meetings:

**The first meeting** will be attended by four members of the project team. The purpose of the meeting will be to discuss the outcomes of the project. The meeting will review project data, it will also consider how well the project was managed and if there are any lessons that can be learned from the project delivery. The meeting will be held off-site at a rural conference centre, it is expected to last for three hours.

**The second meeting** you need to plan is for a group of remote staff who were unable to attend the project meeting. The purpose of the meeting is to share the outcomes of the project meeting and provide a progress update. The meeting is booked for one hour and it will be held virtually.

## TASK 2

Complete the following table to show how you would prepare to deliver **TWO (2)** formal meetings.

Your response must include:

- A discussion of how to **prepare** for each meeting
- An explanation of **information** you would provide to the participants in advance of each meeting
- Identification of the **resources** required to support the delivery of each meeting with reasons for their selection.

(Refer to AC2.1 Discuss how to **prepare** for meetings; AC2.2 Explain **information** that needs to be provided to participants in advance of meetings; AC2.3 Identify **resources** required to support the delivery of meetings and the Indicative Content for this AC)

### COMPLETE THE TABLE:

	Meeting 1: Face to face	
1	Preparation required for the meeting	
2	Information to be provided to participants in advance of the meeting	
3	Resources required to support the delivery of the meeting	

	Meeting 2:	
1	Preparation required for the meeting	
2	Information to be provided to participants in advance of the meeting	
3	Resources required to support the delivery of the meeting	

## TASK 3: Facilitating and chairing meetings

Understanding how to facilitate and chair meetings is an essential skill to ensure that the meeting objective is met.

To complete Task 3a, b and c you may choose to base your response on the scenario shown on page 6 or use examples of managing a formal meeting in an organisation you know well or have researched.

### TASK 3A

Using examples, explain how to **chair** formal meetings to achieve set outcomes.

(Refer to AC3.1 Explain how to **chair** formal meetings and the Indicative Content for this AC)

INSERT YOUR ANSWER HERE

### TASK 3B

A number of challenges can occur when chairing meetings, such as keeping focused on the aims and objectives of the meeting, decision making, and managing participants' behaviour.

Using examples, discuss how to **respond** to each of the challenges outlined below when chairing meetings

(Refer to AC3.2 Discuss how to **respond** to challenges when chairing meetings and the Indicative Content for this AC)

COMPLETE THE TABLE:

Meeting challenge	Response to challenge
<i>Keeping focused on the aims and objectives of the meeting</i>	
<i>Decision making/gaining agreement</i>	
<i>Managing participants' behaviour</i>	

### TASK 3C

Using innovative ways to facilitate meetings may optimise participation and enable opportunities for creative thinking. Innovative methods are constantly evolving but can include the use of visual problem solving, open spaces, exercise breaks, physical activities and games, timed responses, free time, creative activities, alternative locations, props, ban technology, paperless, voting tools.

To complete this task you need to:

- Investigate **THREE (3) innovative ways** that could be considered to facilitate meetings.
- For each example, state the **outcome** it is intended to address (e.g. problem solving, decision making, agreement and consensus, develop new ideas and concepts, buy-in).

(Refer to AC3.3 Investigate **innovative ways** to facilitate meetings to achieve **outcomes** and the Indicative Content for this AC)

COMPLETE THE TABLE

	Innovative way to facilitate meeting	Intended outcome
1		
2		
3		

#### TASK 4: Recording and monitoring meetings

It is essential to record and monitor meeting outcomes to maintain records of the information discussed, the decisions that were agreed, and to identify actions requiring completion.

*To complete Task 4a and b you may choose to base your response on the scenario shown on page 6 or use examples of managing a formal meeting in an organisation you know well or have researched.*

##### TASK 4A

Using examples, outline THREE ways to **record** meeting actions.

(Refer to [AC4.1 Outline how to \*\*record\*\* meeting actions](#) and the Indicative Content for this AC)

##### COMPLETE THE TABLE

1	
2	
3	

##### TASK 4B

Using examples, explain **TWO (2)** ways to **monitor** meeting outcomes to ensure they are met in a timely manner.

(Refer to [AC4.2 Explain how to \*\*monitor\*\* meeting outcomes](#) and the Indicative Content for this AC)

##### COMPLETE THE TABLE

1	
2	

##### REFERENCE AND BIBLIOGRAPHY

Use the box below to cite any external sources used in your assessment:

Refer	Pass
<ul style="list-style-type: none"> <li>• The submission is incomplete</li> <li>• Tasks are incomplete</li> <li>• Not all assessment criteria have been met</li> <li>• No examples are used or the examples given do not match the requirements of the assessment criteria</li> <li>• Evidence is               <ul style="list-style-type: none"> <li>• Unclear</li> <li>• Technically incorrect or inaccurate</li> <li>• Biased</li> <li>• Unprofessional language</li> <li>• Poorly structured and presented</li> <li>• Ideas are underdeveloped</li> <li>• Lacks sufficient detail to show understanding of the topic</li> </ul> </li> <li>• The application of concepts, models and theories to the management and leadership role or workplace is unclear</li> <li>• Evidence is not directly attributable to the learner</li> <li>• External sources of information are not acknowledged</li> <li>• Work based evidence or artefacts (e.g. planning documents or presentation slides) do not meet the requirements of the assessment criteria and is not current (within 5 years)</li> </ul>	<ul style="list-style-type: none"> <li>• All tasks have been completed</li> <li>• All assessment criteria have been met</li> <li>• Examples given are well chosen and match the requirements of the assessment criteria</li> <li>• Evidence is               <ul style="list-style-type: none"> <li>• Well written and presented</li> <li>• Contains a breadth of examples</li> <li>• Accurate</li> <li>• Current (e.g. use of up to date legislation)</li> <li>• Authentic</li> <li>• Inclusive</li> <li>• Coherent</li> <li>• Credible</li> <li>• Technically correct</li> </ul> </li> <li>• Evidence shows an understanding of different perspectives</li> <li>• Concepts, models and approaches and have been applied correctly in context of the management and leadership role or workplace</li> <li>• Evidence used from external sources has been correctly referenced</li> <li>• Evidence is directly attributable to the learner</li> <li>• Work based evidence or artefacts (e.g. planning documents or presentation slides) match the requirements of the assessment criteria and is current (within 5 years)</li> </ul>

## STATEMENT OF AUTHENTICITY

Click [here](#) to download the Statement of Authenticity form.

This statement must be completed and electronically attached to the completed assessment submitted to CMI. Any pieces of work that do not have this signed statement/declaration are inadmissible and will be returned to the Centre.

### Section 1 -

Qualification Title	
Unit Number and Title	
Centre Name	
Learner Name	
Learner CMI Number	

I \_\_\_\_\_ confirm that the work submitted is my own and that I am the sole author of this completed assessment and Sections 1 & 2 of this form have been checked and completed before submission. I have referenced/acknowledged any sources of information and Artificial Intelligence (AI) tools used in the submission; in line with the Qualification Handbook, [CMI's Assessment Guidance Policy](#) and [CMI's Plagiarism, Collusion and Artificial Intelligence \(AI\) Statement](#).

I consent to this assessment, or any extract from it, to be anonymised following which it may be used for assessment standardisation and, where appropriate, for the dissemination of good practice. The assessment will be kept in accordance with GDPR, if you have any concerns regarding this, please refer to our <a href="#">Data Privacy Policy</a>	Tick here to opt-out	
--	----------------------	--

### Section 2 -

Requirement prior to submission	Learner Signature / Initial to confirm
The Assessment Criteria (AC) have been used as headings or I have indicated or sign-posted within my work where each AC has been met.	
Word count is shown on the front sheet and is within the CMI guidelines for the unit.	
All answers relating to the Assessment Criteria (AC) are contained within the body of the text.	
Learner name and CMI membership number are identified on each page within the assessment (header or footer) and each page is numbered.	
All work that is <u>not</u> my own is clearly indicated and referenced using a formal referencing system.	
The work has been reviewed for spelling and grammar.	
Where work has been translated, the accuracy of the translation has been checked.	
<b>I understand that CMI may use plagiarism software in the detection of plagiarism, collusion and AI misuse for this submission.</b>	

I understand that a false declaration is a form of malpractice.

Learner Signature*	
Date (DD/MM/YYYY)	

*\*Please note electronic signatures are accepted*

<b>Ofqual unit number</b>	M/615/8878
<b>RQF level</b>	3
<b>Guided learning hours</b>	19
<b>Total unit time</b>	50
<b>Credits</b>	5
<b>Aims of unit</b>	High performing individuals impact on the performance of teams and the organisation. The aim of this unit is to develop the manager's understanding of how to confidently use their knowledge, skills and abilities to support individuals, not only to perform well, but to exceed expectations.
<b>Keywords</b>	Individual skills and knowledge, role and responsibilities, set objectives and work plans, capability, resources and support, skills of a manager, manage performance, provide feedback, review performance, measure outcomes, high performers, motivation.

<b>Learning Outcome 1</b>	
<b>Understand an individual's work role and responsibilities</b>	
<b>Assessment Criteria</b>	
1.1	Explain the <b>sources of information</b> which state an individual's work role and responsibilities
<b>Indicative Content</b>	
<b>Sources of information</b> may include but are not limited to job description, person specification, team and individual objectives.	
<b>Assessment Criteria</b>	
1.2	Explain the <b>reasons</b> for assessing an individuals' knowledge, skills and behaviours in a work role
<b>Indicative Content</b>	
<b>Reasons</b> may include but is not limited to supporting and developing individuals to achieve personal and professional objectives, planning and allocating work, gap analysis, identify learning and development needs.	
<b>Learning Outcome 2</b>	
<b>Know how to set objectives with individuals</b>	
<b>Assessment Criteria</b>	
2.1	Explain the <b>methods</b> used to set <b>objectives</b> for individuals
<b>Indicative Content</b>	



<p><b>Methods</b> may include but are not limited to SMART (specific, measurable, achievable, realistic and time bound) objectives, organisational requirements, plans, project plans, appraisals, and personal development plans.</p> <p><b>Objectives</b> may be linked to organisational or personal outcomes.</p>	
<b>Assessment Criteria</b>	
2.2	Explain how to assess an individual's <b>capability</b> to achieve objectives
<b>Indicative Content</b>	
<p><b>Capability</b> may include but is not limited to experience, skills, knowledge, capacity and development needs</p>	
<b>Assessment Criteria</b>	
2.3	Outline the <b>process</b> for involving individuals in agreeing clear objectives
<b>Indicative Content</b>	
<p><b>Process</b> may include but is not limited to open communication, listening, questioning, negotiating, check understanding, recording agreement.</p>	
<b>Learning Outcome 3</b>	
<b>Know how to support individuals to perform well</b>	
<b>Assessment Criteria</b>	
3.1	Outline a range of <b>support methods</b> to enable individuals to perform well
<b>Indicative Content</b>	
<p><b>Support methods</b> may include but are not limited to informal and formal personal and professional development, set clear expectations, delegation and allocation of responsibility, review progress, supervision, coaching, mentoring, training, development activities, constructive feedback (Transactional Analysis, Berne, c.1950).</p>	
<b>Assessment Criteria</b>	
3.2	Identify <b>approaches for motivating</b> individuals in their work role
<b>Indicative Content</b>	
<p><b>Approaches for motivating</b> may include but are not limited to encouragement, praise, recognition, clear and respectful communication.</p>	
<b>Assessment Criteria</b>	
3.3	Explain how an individual's achievement can be <b>incentivised</b>
<b>Indicative Content</b>	
<p><b>Incentivised</b> may include but is not limited to financial reward, other benefits, opportunities for development and promotion.</p>	
<b>Assessment Criteria</b>	

3.4	Explain the importance of managing individuals <b>objectively</b>
<b>Indicative Content</b>	
<b>Objectively</b> may include judging on evidence, treating individuals fairly, according to need, observing professional boundaries, inclusive approach, no favourites, no reward for poor performance.	
<b>Learning Outcome 4</b>	
<b>Know how to assess outcomes against the objectives</b>	
<b>Assessment Criteria</b>	
4.1	Summarise the <b>tools</b> that may be used to review an individual's performance
<b>Indicative Content</b>	
<b>Tools</b> may include but are not limited to appraisal, personal development review, 360 degree feedback, customer feedback, observation.	
<b>Assessment Criteria</b>	
4.2	Outline <b>approaches</b> to measuring outcomes against objectives
<b>Indicative Content</b>	
<b>Approaches</b> may include but is not limited to key performance indicators (KPIs), outputs, project and progress reports, internal audit, quality measures, metrics, benchmarks, inspection, surveys.	

Ofqual unit number T/615/8879

RQF level 3

Guided learning hours 18

Total unit time 50

Credits 5

**Aims of unit** As the range of communication tools used by an organisation continues to grow, and new technologies emerge, managers are faced with the challenge of how to select and use different tools to ensure that communication is effective, timely and has impact. The aim of this unit is to equip managers with the knowledge and skills to select and use a range of workplace communication methods. These must be measurable and tailored to the needs of the target audience.

**Keywords** Communication types, channels, objectives, audience, methods, stages, communication cycle, transmit, respond, feedback, process, planning, effectiveness, communication tools, barriers, legislation and regulation, formal and informal communication.

Learning Outcome 1	
Know the channels and types of communication used in the workplace	
Assessment Criteria	
1.1	Explain the <b>importance</b> of effective communication in the workplace
Indicative Content	
<b>Importance</b> with reference to the individual, team and organisation	
Assessment Criteria	
1.2	Identify <b>channels</b> of communication used in the workplace
Indicative Content	
<b>Channels</b> may include but are not limited to formal and informal, face to face, telephone, electronic, digital media, oral, visual, written, mass media, real time, pre-recorded.	
Assessment Criteria	
1.3	Assess strengths and weaknesses of different <b>types</b> of communication used in the workplace
Indicative Content	
<b>Types</b> may include but are not limited to written: letters, memos, reports, newsletters, noticeboards; verbal: telephone calls, video conferencing, briefings and meetings, presentations; digital: intranet, emails, blogs, instant	

messaging, discussion forums, social media posts and comments, live chat, web chat, avatars, skype, electronic forms, apps, podcasts and webinars.	
<b>Assessment Criteria</b>	
1.4	Summarise <b>legal requirements</b> and <b>organisational policies</b> that affect the use of the different types of communication in the workplace
<b>Indicative Content</b>	
<p><b>Legal requirements</b> may include but are not limited to Data Protection Act 1998, General Data Protection Regulation (applies from May 2018), Equality Act 2010, Communications Act 2003, Digital Economy Act 2016. Learners may also make reference to other local laws as relevant.</p> <p><b>Organisational policies</b> may include but are not limited to communications policies, brand guidelines, house style, digital communication policies and procedures, standard responses, whistleblowing.</p>	
<b>Learning Outcome 2</b>	
<b>Understand the communication cycle</b>	
<b>Assessment Criteria</b>	
2.1	Explain the <b>communication cycle</b> and its application in the workplace
<b>Indicative Content</b>	
<b>Communication cycle</b> may include but is not limited to sender, receiver, encoding, decoding, message, barriers, feedback (Schramm, 1954; Shannon and Weaver, 1948).	
<b>Assessment Criteria</b>	
2.2	Explain <b>barriers</b> to effective communication
<b>Indicative Content</b>	
<b>Barriers</b> may include but are not limited to tangible e.g. environment, noise, technology, time, timing, resources, language, type or channel of communication, interference, timing, compliance, lack of control; intangible, volume e.g. confidence in individuals or participants, cultural, prejudice, bias, emotional.	
<b>Assessment Criteria</b>	
2.3	Explain <b>ways to overcome</b> barriers to communication
<b>Indicative Content</b>	
<b>Ways to overcome</b> may include but are not limited to listening to and observing the audience, reducing distractions, speaking more clearly, active listening, restating or adjusting language, changing pace.	
<b>Learning Outcome 3</b>	
<b>Be able to plan communication for a target audience</b>	
<b>Assessment Criteria</b>	
3.1	Explain the <b>planning</b> process for communicating with a <b>target audience</b>

Indicative Content	
<p><b>Planning</b> may include but is not limited to identify the target audience and their needs, aims and objectives, clarify message purpose, cost, data security, suitability, timeliness, choose appropriate communication channel, plan the message content, check for accuracy and completeness, identify call to action.</p> <p><b>Target audience</b> may include but is not limited to groups or individuals, team members, colleagues, other departments, managers, customers, suppliers, partners</p>	
Learning Outcome 4	
Know how to measure the effectiveness of communication with a target audience	
Assessment Criteria	
4.1	Assess ways of <b>measuring</b> the effectiveness of communication with a target audience
Indicative Content	
<p><b>Measures</b> may include but are not limited to personal: unprompted reactions, asking for feedback, checking understanding, call monitoring; written: surveys, response data, monitoring progress; digital: web tracking services, click through, polls, stamps, kudos, web forms, authentication, metrics.</p>	

Ofqual unit number M/615/8914

RQF level 3

Guided learning hours 19

Total unit time 40

Credits 4

**Aims of unit** Managers are increasingly faced with days packed full of meetings that leave little time to get things done. Run well, meetings can be a place where issues are discussed, problems resolved, and decisions are made. However, all too often, meetings lack purpose and there is frustration if little has been achieved. The unit content has been designed to challenge traditional thinking. It aims to equip managers with the knowledge and tools to try different approaches when conducting meetings. It also explores good practice for preparing for and leading meetings, which have impact and also delivers results

**Keywords** Purposes, types, innovative, factors, prepare, information, resources, good practice, motivate, challenges, set, record, monitor

Learning Outcome 1	
Understand the purposes and types of meetings	
Assessment Criteria	
1.1	Explain the <b>purposes</b> of meetings
Indicative Content	
<b>Purposes</b> may include but are not limited to giving or receiving information, status updates, make decisions, planning, reporting, information sharing, team building, introduce new concepts or ideas, monitoring outcomes.	
Assessment Criteria	
1.2	Compare different <b>types of meetings</b>
Indicative Content	
<b>Types of meetings</b> may include but are not limited to formal and informal, face to face, seminars, committee, virtual (e.g. video conference, web meetings), huddles, collaborative, telephone, one to ones, team or groups, briefings, standing meetings, breakfast meetings, time limited.	
Assessment Criteria	
1.3	Identify <b>factors</b> which need to be considered when selecting meeting types
Indicative Content	

<b>Factors</b> may include but are not limited to meeting aim and objective, time, costs, attendee availability or location, equipment requirements, internal or external attendees, confidentiality, urgency, sensitivity.	
<b>Learning Outcome 2</b>	
<b>Understand how to prepare for meetings</b>	
<b>Assessment Criteria</b>	
2.1	Discuss how to <b>prepare</b> for meetings
<b>Indicative Content</b>	
<b>Prepare</b> may include but is not limited to budget, timing, attendees, content and documentation, roles and responsibilities, location, materials and equipment.	
<b>Assessment Criteria</b>	
2.2	Explain <b>information</b> that needs to be provided to participants in advance of meetings
<b>Indicative Content</b>	
<b>Information</b> may include but is not limited to purpose, participation and input, timings, outputs, instructions, protocols.	
<b>Assessment Criteria</b>	
2.3	Identify <b>resources</b> required to support the delivery of meetings
<b>Indicative Content</b>	
<b>Resources</b> may include but are not limited to people, budget, equipment, materials, technology, accessibility.	
<b>Learning Outcome 3</b>	
<b>Understand how to facilitate and chair meetings</b>	
<b>Assessment Criteria</b>	
3.1	Explain how to <b>chair</b> formal meetings
<b>Indicative Content</b>	
<b>Chair</b> may include but is not limited to objectives, time keeping, documentation, roles and responsibilities, inclusivity, involvement, agreement and consensus, behaviours, opening and closing, actions and accountability.	
<b>Assessment Criteria</b>	
3.2	Discuss how to <b>respond</b> to challenges when chairing meetings
<b>Indicative Content</b>	
<b>Respond</b> may include but is not limited to control, referring to agenda, keeping to time, diffusing conflict.	
<b>Assessment Criteria</b>	

3.3	Investigate <b>innovative ways</b> to facilitate meetings to achieve <b>outcomes</b>
<b>Indicative Content</b>	
<p><b>Innovative ways</b> may include but are not limited to visual problem solving, open spaces, exercise breaks, physical activities and games, timed responses, free time, creative activities, alternative locations, props, ban technology, paperless, voting tools.</p> <p><b>Outcomes</b> may include but are not limited to problem solving, decision making, agreement and consensus, develop new ideas and concepts, buy-in.</p>	
<b>Learning Outcome 4</b>	
<b>Assessment Criteria</b>	
4.1	Outline how to <b>record</b> meeting actions
<b>Indicative Content</b>	
<p><b>Record</b> may include but are not limited to responsibilities, accountability, actions, deliverables, deadlines, assigned and agreed actions, action logs, meeting management software, digital notebooks, collaborative tools, mind mapping, instant messaging, video, audio.</p>	
<b>Assessment Criteria</b>	
4.2	Explain how to monitor meeting outcomes
<b>Indicative Content</b>	
<p><b>Monitor</b> may include but not limited to progress, actions, communication, achievement, reminders.</p>	