Pathways Plus

Strategic Management and Leadership

Level 7 Tutor Guide

SAMPLE MATERIAL

Tutor Guide

Pathways Plus

Tutor Guide

Copyright © Chartered Management Institute, Management House, Cottingham Road, Corby, Northants NN17 1TT.

First edition 2009

Author:	Bob Croson
Series consultants:	Roger Merritt Associates
Project manager:	Trevor Weston
Editor:	Suzanne Pattinson
Page layout by:	Decent Typesetting

Revised edition 2010

Author:	Roger Merritt
Consultant:	Bob Croson

Revised July 2013

British Library Cataloguing-in-Publication Data. A CIP catalogue record for this publication is available from the British Library.

ISBN 0-85946-553-5

All rights reserved, save as set out below. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the written permission of the copyright holder except in accordance with the provisions of the Copyright, Designs and Patents Act 1988 or under the terms of a licence issued by the Copyright Licensing Agency Ltd, 90 Tottenham Court Road, London, England WIT 4LP.

Applications for the copyright holder's written permission to reproduce any part of this publication should be addressed to the publisher. Permissions may be sought directly from the Chartered Management Institute in Corby, UK. Phone Publications on (+44) (0) 1536 207379, or email publications@managers.org.uk.

This publication is sold subject to the condition that it shall not, by way of trade or otherwise, be lent, re-sold, hired out, or otherwise circulated without the publisher's prior consent in any form of binding or cover other than that in which it is published and without a similar condition being imposed on the subsequent purchaser.

Approved centres may purchase a licence from the publisher, enabling PDF files of the publication to be printed or otherwise distributed solely within the centre for teacher and student use only according to the terms and conditions of the licence.

Further information is available on the licence from the Chartered Management Institute.
Phone (+44) (0) 1536 207379, or email publications@managers.org.uk.

SAMPLE MATERIAL

Contents

Introduction 5

Qualification structure 6

Work-based learning 8

Using Pathways Plus 12

Assessment 18

Details of accredited units 19

More information 36

SAMPLE MATERIAL

SAMPLE MATERIAL

Introduction

Welcome to the Tutor Guide of *Pathways Plus* Strategic Management and Leadership. The Chartered Management Institute has created these learning materials to support its Level 7 Strategic Management and Leadership qualifications.

This Tutor Guide aims to provide you with information and advice to help you use these learning materials successfully with your students. It incorporates the information found in the *Centre Assessment Guidance for Level 7 Strategic Management and Leadership*. It's assumed that you are an experienced tutor, working through an approved CMI centre for the delivery of programmes at Level 7.

These Level 7 Strategic Management and Leadership qualifications are geared towards senior managers who are focused on the direct interaction between operational performance and strategic development and implementation. As they develop and take on more responsibilities, their organisation will expect them to:

- communicate the strategic direction and relevant organisational objectives to the people they manage
- achieve the operational targets together
- contribute to the selection of objectives and direction through sound strategic practice.

These qualifications should help managers to fulfil these expectations. In working with these materials they should be able to:

- achieve the qualification
- develop their knowledge, understanding and skills in strategic management and leadership
- make a real contribution to their organisation's development.

There are no specific entry requirements for students, but it's crucial that you feel that they have sufficient experience and involvement at this level of management to make the best use of the materials and the assessment that follows.

SAMPLE MATERIAL

Qualification structure

There are four qualifications relating to Level 7 Strategic Management and Leadership, as shown in the table below.

CMI Code	Title	Qualification reference number
7A1V1	CMI Level 7 Award in Strategic Management and Leadership (QCF)	600/9461/8
7C1V1	CMI Level 7 Certificate in Strategic Management and Leadership (QCF)	600/9457/6
7D1V1	CMI Level 7 Diploma in Strategic Management and Leadership (QCF)	601/1196/3
7EDV1	CMI Level 7 Extended Diploma in Strategic Management and Leadership (QCF)	600/9460/6

The titles are those that appear on the qualification when it's awarded. The qualification reference number is the one allocated to the qualification, confirming that it's a fundable qualification on the Qualifications and Credit Framework (QCF). The CMI code is the one that must appear on the course registration form.

There are a total of 17 units. The table at the end of this section gives the titles, credits and guided learning hours (GLH) for each unit. The credit value specifies the number of credits that the student will be awarded on achieving the learning outcomes of a specific unit.

- To achieve the **award**, students need to complete any combination of units to a minimum of 6 credits.
- To achieve the **certificate**, students need to complete any combination of units to a minimum of 13 credits.
- To achieve the **diploma**, students need to complete any combination of units to a minimum of 39 credits.
- To achieve the extended **diploma**, students need to complete all the core units (Group A) and three optional units (Group B) to a total of at least 66 credits.

To complete a unit, there's a certain amount of learning time required, to cover such activities as directed study, assessment, tutorials, mentoring and individual private study. The guided learning hours relate only to facilitated learning and associated assessments. Individual private study is not included.

Full details of each unit giving the learning outcomes and assessment criteria can be found at the end of this guide.

The relationship of each unit to the National Occupational Standards can be found at the end of each development guide.

SAMPLE MATE

Units		Credits	GLH
Group A			
Unit 7001V1	Personal leadership development as a strategic manager	6	20
Unit 7002V1	Developing performance management strategies	7	25
Unit 7003V1	Financial management	7	30
Unit 7004V1	Strategic information management	9	30
Unit 7005V1	Conducting a strategic management project	10	35
Unit 7006V1	Reviewing organisational strategy plans and performance	9	30
Group B			
Unit 7007V1	Financial planning	6	20
Unit 7008V1	Developing a marketing strategy	6	20
Unit 7009V1	Strategic project management	6	20
Unit 7010V1	Implementing organisational change strategies	7	25
Unit 7011V1	Strategic planning	9	30
Unit 7012V1	Strategic human resource planning	8	30
Unit 7013V1	Strategic leadership practice	7	30
Unit 7014V1	Strategic leadership	7	30
Unit 7021V1	Introduction to strategic management and leadership	10	45
Unit 7022V1	Developing risk management strategies	9	30
Unit 7023V1	Strategic corporate social responsibility	9	30

SAMP

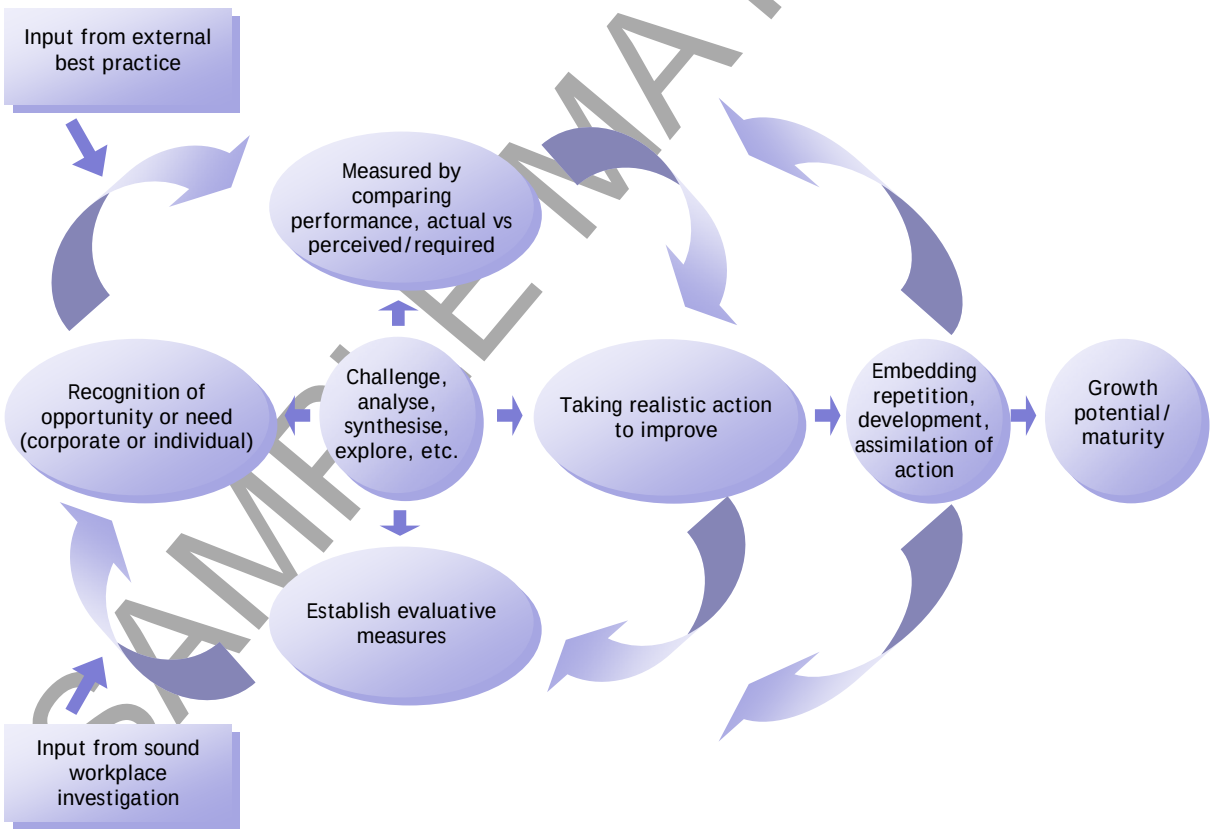
Work-based learning

Your centre will have clear ideas about the structure of its programme. The guidance and thinking that follows is given to fit in with that programme. It should also help you focus on how students can complete this type of work-based learning most effectively and how your programme can best be structured and delivered.

Learning inputs

By looking at 'learning inputs' you can better understand how students learn. Work-based programmes involving independent learning require a great deal of ownership and understanding of learning if they are to be successful.

The model illustrated below examines the detail of developing effective workplace learning. It's derived from much of the work by David Kolb and others (see his book *The Learning Style Inventory*, 1985, McBer).



SAMPLE MATERIAL

The core of the model takes its structure from the accepted learning models of the past few decades. The student or their organisation begins by recognising a need or an opportunity. They then develop that recognition by comparing actual performance against the potential of the perceived or required

opportunity to improve. They can then take focused (SMART) action to evaluate its value.

Three things then influence the ability to make that 'virtuous circle' more effective. The first is the central element (centre circle), which influences the quality of thinking around the circle. It focuses on developing the ability to challenge, analyse, synthesise and explore. By encouraging these skills through good blended-learning approaches, the student can improve the quality of their knowledge and understanding.

'Fuel' is required to assist this process, which comes from two sources:

- The first is workplace investigation, using a range of tools and techniques to encourage an attitude of seeking evidence rather than just using intuition, enhancing the value of experience with fact.
- Second, it's essential that students compare their own practice with that of others. These learning materials provide a variety of resources to do this. Good desk research, using models, frameworks and concepts effectively, enables much more objective evaluation and successful development.

In the learning materials the student looks at many issues from different perspectives, returning to core areas and examining them with a different emphasis. This, together with good assessment practice, enables them to embed core skills, knowledge and understanding in their practice.

This approach takes advantage of effective blended learning.

Blended learning

In 2008 the Chartered Management Institute published a research report on blended learning called Learning at Work: E-learning Evolution or Revolution? This is recommended reading in establishing how your blended learning programme might operate. You'll find it on the CMI website:

https://www.managers.org.uk/sites/default/files/user35/CMI_-_Learning_at_work_October_2008_-_Full_Report.pdf

Blended learning (that is, using more than one type of intervention to achieve a learning goal) allows for maximising learning opportunity. *Pathways Plus* and its links to a variety of resources create such maximum learning opportunities.

Four broad principles offer support to blended learning:

- **Learning occurs in context**: To be effective, learning needs to be focused strongly in the student's work context. The programme does this, and students are strongly encouraged to focus on integrating their work activities with the programme, including the assessment. Also, it's a good idea to involve their organisation, their line manager in particular, in some way.

SAMPLE MATERIAL

- **Learning is active**: The learning should generate connections between current and present knowledge and future development, and identify meaning from those experiences. A real key to success is to focus a student's thinking on improvement and development, both personally and organisationally. Practical (SMART) outcomes are vital to motivating learning.
- **Learning is social**: A social view of learning focuses attention on making connections between participants within a learning group and then out into a broader context. These connections often continue beyond the life of the learning experience or opportunity. There will be many stakeholders in the student's learning, and students need to keep those people informed. But, more than that, they should work to develop a good learning group, supporting colleagues, learning from and with them and seeking help and advice from them.
- **Learning is reflective**: It's vital for students to evaluate the implications of the ideas they're studying. This can happen when they get feedback about their thinking, that feedback coming from a variety of sources such as you, their line manager and peers.

Your centre will have its own approach to blended learning. This would normally include some or all of the following:

- an induction process giving guidance on the use of the development guides
- workshops exploring key themes and learning from the development guides
- student support
- clarification on the assessment process.

Weaving through all this is the student's personal learning journey. In order to enable that journey, linking the learning approach with the blended-learning principles, you need to consider the best way to use the workshop, materials, student support and assessment process.

The activity below gets you to explore how to maximise these opportunities.

Activity

Activity 1

Take each of the blended learning principles listed above and explore how you could develop effective opportunities for the students.

Principles	Opportunities
Learning occurs in context	

SAMPLE MATERIAL

Learning is active	
Learning is social	
Learning is reflective	

Feedback

This activity should have given you an opportunity to reflect on the opportunity to create a good blended-learning experience. Although you were presented with four distinct principles, they actually blend together to produce a good learning experience. The challenge is to create a blend that takes advantage of the opportunities available, but puts them together to create a coherent and realistic learning experience for students.

In particular, it's important to help them have a clear understanding of all the stakeholders in their journey, and how to get the most from those links. In the Student Guide *there's an activity geared to exploring that issue, and you may find it useful to do that with each student.*

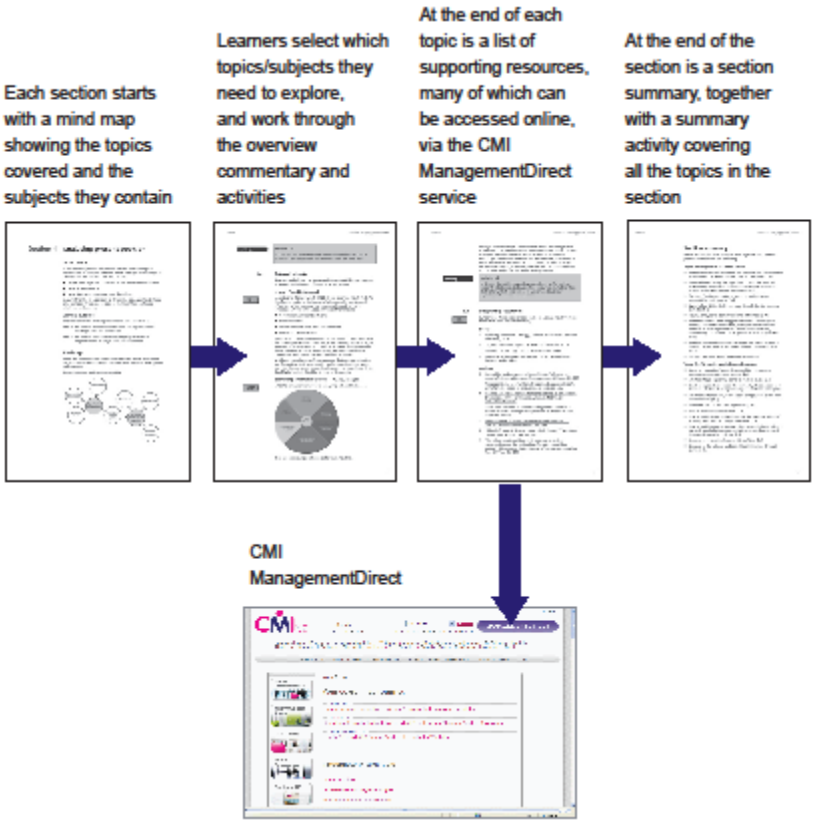
Also, when putting together a programme, there's also a need to create coherence in the process, to develop activities that encourage depth of analysis, reflection and breadth of thinking, using fellow students, tutors, workplace colleagues and experts.

SAMPLE

Using Pathways Plus

The *Pathways Plus* learning materials take the form of 15 development guides. Units 7006V1 and 7011V1 are presented together in one development guide, as are Units 7013V1 and 7014V1.

These development guides are supported by further resources, many of which are available online via the CMI ManagementDirect portal linking through to Study Support or Senior Manager Resources. An integrated learning journey is provided by these materials, and this is set out in the diagram below.



The development guides are designed to support the programme approach that your centre offers. They are different from materials at other levels, giving busy, senior managers the opportunity to explore learning in a focused way appropriate to their needs.

The guides provide support materials to help achieve the learning and assessment criteria for each unit. They guide students to a variety of sources so that they can take ownership of their own learning journey. They work as part of a blended-learning approach, which is clearly driven and developed by each centre individually.

SAMPLE MATERIAL

Pathways Plus aims to:

- be structured around core work themes as well as qualification units
- be focused on application of knowledge rather than extensive text
- be directed beyond surface learning
- be signposted towards relevant resources to enable non-sequential learning based on the learner's own situation
- encourage successful blended-learning journeys using a wide variety of resources
- generate learning and reflective thinking
- be concise, clear, engaging and explicit.

The structure of each guide enables students to effectively and efficiently identify areas and subjects to enhance their knowledge and development. They are divided into sections, which are then split up into topics. Each guide starts by showing the sections and topics schematically and relating them to the learning outcomes.

A key feature of the materials is the use of models and frameworks. They are designed to make the learning more active and provide excellent tools for analysis and evaluation at this strategic level.

There are also many links and references to other sources (called 'Supporting resources'):

- ManagementDirect (the CMI management and leadership portal). These sites are signposted in the materials to give you easy access to a vast amount of articles, reports, books, checklists and multimedia
- books to enhance their studies (such as *Exploring Corporate Strategy* by Johnson *et al.*).
- relevant websites and other materials.

Accessing resources

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. Tutors may access the content of Study Support by clicking on the More option and then CMI Qualifications or for the level & units under Senior Manager Resources.

ManagementDirect is an excellent source of information and useful for gaining ideas to help with your study.

Connecting to ManagementDirect requires a username and password, which you will receive direct from CMI.

SAMPLE MATERIAL

On the home page of ManagementDirect you will be prompted to 'Login' and will need to enter your username and password to gain access to the resources.

One way to view the resources available is to select from the headings '5 minute briefing', '20 minute briefing' and 'Extended briefing' which break down the resources according to the time available to the user. In each case key topics are listed alphabetically and then you can choose the extent of information that you want on that subject with links provided to appropriate resources.

Another way to find resources is to use the 'A-Z' topic search at the top of the home page. So, for example, if you want to know more about mentoring, you would click on M, then on 'Mentoring' and you are presented with a list of resources (definition, leader video, checklists, etc).

You can also search each content category ('Definitions', 'Leader videos', etc) to view the resources available. For example, if you hover over 'Concepts' and then click on 'Models' you are presented with over 60 different models (7Ps, ACHIEVE coaching model, etc). Click on the title and a html page will open.

Or you can search using the prominent 'Search' box on the ManagementDirect Homepage.

Exploring the site for half an hour or so will allow you to see what's available. You'll discover that ManagementDirect is a very flexible tool providing a library full of resources, but the key to any library is to roam around it and practise the possible routes and choices before looking for specific resources.

In addition, the CMI Management Library holds an extensive range of books and pamphlets for loan to members. A postal loan service is offered to members in the UK only. You will only pay your return postal charges. Go to www.managers.org.uk/library to review the collection and to place your requests.

Pathways Plus and your programme

At this level of management, most students should know which areas they need to explore and be aware of their preferred learning style. However, it's important to ensure at induction that this is in fact the case. If extra support is needed, it's much better to deal with it at the start of the programme rather than later when frustrations have set in and the student has doubts about progressing further. Doubts tend to be in the form of 'I haven't done this for years', 'I've never done this before' or 'This is different from an academic approach'. You'll need to reassure students who have such concerns that they do have the ability and experience to work through the programme successfully.

Your induction process is vital in this respect and it's suggested that you encourage students to carry out a needs analysis using the mind maps and introductions to each development guide. At

SAMPLE MATERIAL

induction it's important that you explain the assessment requirements so that when students work through the materials they can highlight the resources that will assist them.

Students should then go away and read through the subjects or topics where they've identified a gap in their knowledge or understanding. A key assumption is that they'll be able to either skim read or miss out certain topics where they already have confidence in their knowledge from doing other qualifications or through their own experience.

At this level students are expected to make their own selection of subjects and topics but you may find that you can usefully support them in doing this. In the *Student Guide* students are encouraged to carry out a needs identification analysis before working on each guide, by highlighting the areas they need to explore. In addition, they are encouraged to check the assessment criteria and from that organise how they wish to use the guide. There are two key points when you can have a valuable input:

- At induction, by coaching them in how to identify their needs and select their course of study.
- During the programme, particularly at workshops, by encouraging them to focus their studies on the needs they've previously identified and not to be overwhelmed by the amount of material. By doing this, you'll be helping them to complete their studies on time and remain motivated throughout.

In addition to selecting from *Pathways Plus* as a resource to support your blended-learning programme, you need to address the items in the following checklist:

1 Plan the pedagogic structure of your programme to get an appropriate balance of classroom and distance learning.

2 Create the programme from the most appropriate units.

3 Ensure that the characteristics and context of your learners will suit this approach to learning.

4 Consider how to provide or develop any further teaching or assessment resources that will be required.

5 Examine the business case for any additional resources that are required and consider how you will evaluate the return on that investment.

6 Identify any technical development or support required.

7 Consider how you will present the benefits to the learners, their sponsors and/or employers.

8 Plan any staff development that will be required for tutors.

9 Build in the monitoring and evaluation of the programme to ensure that it meets the needs of clients, the institute, funding agencies and other stakeholders.

SAMPLE MATERIAL

Activity

Activity 2

In the table below make comments on how your programme will address the points made above.

Checklist points	Comments
Pedagogic structure	
Appropriate units	
Learners' characteristics and approach	
Further resources	
Business case for further resources	
Technical development and support	
Benefits to others	

SAMP

Staff development	
Monitoring and evaluation	

Feedback

The planning checklist is not exhaustive and can't be carried out in isolation. In addition to others in your organisation who'll need to be involved, you will have corporate clients, learner sponsors or other delivery partners who will wish to be consulted throughout the planning stages of the programme. The big challenge is to find a blend of units appropriate for each group of learners.

In designing programmes, account must be taken of the new programme structure shown in the Centre Assessment Guidance. *There is a need therefore to be unit-focused, ensuring that each can stand alone, and flexible in the way that units are put together to develop the awards, certificates and diplomas. Within each unit there needs to be the opportunity to apply flexible solutions to assessment.*

SAMPLE

Assessment

The main objective of assessment is to meet the learning outcomes relating to each unit. Assessment in itself is a great learning opportunity, requiring students to investigate key issues in the workplace, which will benefit their organisation as well as them personally.

The Chartered Management Institute urges approved centres to develop assessment models that are flexible and meet the needs of all concerned — the Institute, the centre, the students and the students' organisation. It's your centre's responsibility to select tasks and activities for assessment that are relevant to each unit. You may wish to use or adapt some of the activities that appear in the development guides, giving clear instructions on what's expected and clearly explaining any criteria for assessment.

Your centre should decide upon the variety of assessment approaches it will accept. The written word, however it is generated or recorded, will probably provide the majority of the assessable work. The amount and volume of work for each unit is likely to be in the region of 3,000 to 3,500 words or the equivalent. The use of models and frameworks, plus appropriate charts, graphs and tables, will be valuable in communicating information and will assist students in the presentation and development of analysis and evaluation.

Assessment makes for improved business and organisational practice and you should not view it as just a piece of academic assessment.

The qualification has no grading, but only recognises a 'pass' or 'fail' result. Centres are entirely free to apply their own grade scales but these are completely separate from the CMI qualification. Your centre should set out what will happen if a student's work doesn't achieve the required standard.

Students are required to make their assessed work:

- accurate, current and authentic
- relevant in breadth and depth.

They must also show that they have the following:

- a clear grasp of concepts
- the ability to link theory with practice
- the ability to communicate clearly in the relevant discipline, at the expected level for this qualification.

You, or the assessors, should give clear feedback to students on their work, discussing the assessment given and suggesting ways to improve their responses if necessary.

SAMPLE MATERIAL