



Technical and Vocational Education and Training (TVET) Council



Occupational Standards of Competence

Social Media Management Level 3

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Qualification Overview
NVQB
in
Social Media Management
Level 3

NVQB Qualification – Social Media Management Level 3

Qualification Overview

The NVQB in Social Media Management is designed to provide training, assessment and recognised certification for persons who are developing social media and promotional strategies, generally managing their own or clients' business brand and optimising the performance of social media and online platforms.

Candidates must be able to develop and implement social media strategies, publish and manage social media posts, analyse the performance of the business and the social media and online platforms as well as able to communicate and deliver reliable and effective customer service to their online customer base.

Who is this qualification for?

This qualification is aimed at individuals who are now starting their own business and trying to place their business brand on the market as well as those who are tasked with managing specific social media brands for employers/clients. Knowledge of existing social media and online platforms is required and persons must possess some level of autonomy, be responsible enough to perform tasks independently and work as part of a team. The competencies are for persons who are likely to be in roles where for example their duties include:

- publishing social media posts
- monitoring social media accounts
- managing social media posts, customers
- digital communications/marketing

Jobs within the occupational area

Relevant job roles include:

- Social media management
- Entrepreneurship
- Media and communications professional/specialists
- Creatives/artists
- Digital marketers

Where can it be used?

The NVQB in Social Media Management can be used within varying types of business environments by training providers and employers who manage social media. Employers can also use this qualification to support employees in planning their careers and in the development of businesses to maintain suitable employment.

This is not exhaustive and only serves to illustrate the breadth of the qualification.

A011803 - APPROVED NATIONAL VOCATIONAL QUALIFICATION STRUCTURE
SOCIAL MEDIA MANAGEMENT LEVEL 3

To achieve the full qualification, candidates must complete **all** ELEVEN (11) mandatory units.

<u>MANDATORY UNITS (ALL MUST BE COMPLETED)</u>	<u>CODE</u>
1. Develop and implement a social media strategy	UA39603
1.1 Establish social media and online platforms requirements	
1.2 Create a social media strategy	
1.3 Launch a social media strategy	
1.4 Evaluate a social media strategy	
2. Establish a business brand presence on social media and online platforms	UA39703
2.1 Identify social media and online platforms to be used for the business brand	
2.2 Institute a business brand presence on social media and online platforms	
3. Analyse the performance of the business brand on social media and online platforms	UA39803
3.1 Identify social media and analytical tools used for social media and online platforms	
3.2 Evaluate data collected from social media and online platforms	
3.3 Evaluate the performance of business brand on social media and online platforms	
4. Implement an online/social media promotional strategy for the business brand	UA39903
4.1 Plan a promotional campaign for the business brand	
4.2. Execute promotional campaigns on social media platforms	
4.3 Measure brand performance on social media and online platforms	
5. Analyse and optimise the performance of social media and online platforms	UA40003
5.1 Audit social media and online platform performance	
5.2 Prepare performance optimisation strategies	
5.3 Implement optimisation measures for social media and online platforms	
5.4 Monitor and evaluate ongoing social media and online platform performance	
6. Comply with ethical, regulatory and professional standards	UA40103
6.1 Establish the ethical, regulatory and professional standards	
6.2 Adhere to the ethical, regulatory and professional standards	

MANDATORY UNITS (ALL MUST BE COMPLETED)

CODE

- 7. Maintain safe and effective working practices** **U92502**
- 7.1 Protect the safety of self and others in the workplace
 - 7.2 Maintain working relationships with others
 - 7.3 Maintain and develop personal performance
- 8. Communicate to develop and maintain networks and relationships** **U78103**
- 8.1 Communicate ideas and information
 - 8.2 Develop trust and confidence
 - 8.3 Develop and maintain networks and relationships
 - 8.4 Manage difficulties for positive outcomes
- 9. Deliver reliable customer service** **U12902**
- 9.1 Prepare to deal with your customers
 - 9.2 Give consistent service to customers
 - 9.3 Check customer service delivery
- 10. Lead your team** **U83504**
- 10.1 Plan work
 - 10.2 Support team members
- 11. Craft a personal entrepreneurial strategy** **U92702**
- 11.1 Establish the nature of entrepreneurship
 - 11.2 Identify and assess entrepreneurial characteristics
 - 11.3 Develop a self-assessment profile
 - 11.4 Craft an entrepreneurial strategy

UA39603**Develop and implement a social media strategy**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to develop and implement an effective social media strategy based on the goals and objectives of the organisation. The strategy should cover the overall objectives for the organisation's online presence as well as those for targeted online campaigns.

It applies to self-employed individuals and employees who work at senior levels and have responsibility for making a range of operational and strategic decisions.

ELEMENT**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | | | |
|----|---|-----|--|
| 1. | Establish social media and online platform requirements | 1.1 | Confirm where necessary, with relevant personnel , the overall goals and objectives of the organisation relating to social media management. |
| | | 1.2 | Research information specific to the business brand and trends. |
| | | 1.3 | Research types of social media and online platforms , their functions and social media analytical tools available for use within own country. |
| | | 1.4 | Analyse information gathered to determine which social media and online platforms are best suited to achieve organisational goals and objectives. |
| | | 1.5 | Select social media and online platforms to be utilised by the organisation in accordance with organisational goals, objectives, policies and procedures. |
| | | 1.6 | Identify social media analytical tools and metrics for measuring the performance of the social media and online platforms . |

2. Create a social media strategy
 - 2.1 Define the overall and targeted use of chosen **social media and online platforms** in accordance with organisational goals and objectives.
 - 2.2 Confirm the key performance indicators and evaluation criteria for measuring the performance of **social media and online platforms** in accordance with organisational goals and objectives.
 - 2.3 Select **social media analytical tools** for analysing the performance of the **social media and online platforms**.
 - 2.4 Document the social media strategy and inform relevant personnel in accordance with organisational policies and procedures.
 - 2.5 Establish a budget and confirm the **resources** required for implementing the social media strategy according to organisational objectives.
3. Launch a social media strategy
 - 3.1 Develop an action plan for implementing the social media strategy in accordance with organisation goals and objectives.
 - 3.2 Plan and schedule **social media activities** in conjunction with **relevant personnel**.
 - 3.3 Establish the social media strategy in conjunction with confirmed **social media activities**.
 - 3.4 Monitor **social media activities** to ensure that the social media strategy is being adhered to using agreed organisational methods.
4. Evaluate social media strategy
 - 4.1 Generate **data** from **social media and online platforms** which reflect the goals and objectives of the social media strategy in accordance with privacy and data security requirements and organisational procedures.

- 4.2 Record **data** findings in a systematic manner in accordance with organisational procedures.
- 4.3 **Create** social media **data reports** in accordance with organisational policies and procedures.
- 4.4 **Document** the performance of the social media strategy in accordance with standard operating procedures.
- 4.5 Make recommendations to **relevant personnel** on how the social media strategy can be improved for optimal performance of **social media and online platforms**.
- 4.6 Modify and customise where necessary, the social media strategy for optimal performance of **social media and online platforms**.
- 4.7 **Document** modifications made to the social media strategy according to organisational procedures.

RANGE STATEMENT

All range statements must be assessed:

1. **Relevant personnel** may include but are not limited to:
 - Internal
 - External
2. **Information** may include but is not limited to:
 - From target audience
 - Market
 - Competition
 - Social media and online platforms
 - Social media analytical tools
3. **Social media and online platforms** may include but are not limited to:
 - Networking sites e.g., Facebook, Twitter, LinkedIn
 - Media sharing networks e.g., Instagram, Snapchat, YouTube
 - Blogging/publishing Networks e.g., WordPress, Tumblr, Medium
 - Discussion/forum sites e.g., Reddit, Quora, Digg
 - Sharing economy networks
 - Consumer review networks e.g. Yelp, Zomato, Trip Advisor
 - Other platforms based on organisational needs and functions
4. **Social media analytical tools** may include but are not limited to:
 - In-built
 - External provider
5. **Resources** may include but are not limited to:
 - Human
 - Financial
 - Physical
6. **Social media activities** may include are but not limited to:
 - Posts
 - Promotions
 - Advertisements/campaigns
7. **Data** may include but is not limited to:
 - Demographics
 - Sales
 - Followers
 - Engagement
 - Reach
8. **Create** may include but is not limited to:
 - Manually
 - Electronically using social media analytical tools

9. Data reports may include but are not limited to:

- Automated
- Manual

10. Document may include but is not limited to:

- Physically
- Electronically

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the goals and objectives of the organisation relating to social media management.
2. What are the organisational policies and procedures relating to social media management.
3. What are the approved methodologies and sources of information on market, target audiences, demographics, competition, social media and online platforms, social media analytical tools and how to perform such research.
4. How to collate, analyse and approve information gathered on social media and online platforms relevant to the organisation's goals and objectives.
5. What are social media and online platforms and what they are used for.
6. What is a social media strategy and how to develop, document and use one.
7. What are social media activities and how to plan and schedule them.
8. What are social media analytical tools and data and how to use them effectively for the organisation.
9. What are key performance indicators and how to use these to measure the performance of social media and online platforms.
10. What resources are required to implement a social media strategy.
11. How to develop an action plan for implementing social media strategy.
12. How to launch a social media strategy.
13. How to monitor social media activities online.
14. What is social media data and how to generate and use such safely and confidentially.
15. What are the privacy and data security requirements for generating social media data from social media and online platforms.
16. Why it is important to create social media data reports how to do so.
17. How to analyse social media data reports.
18. Why it is important to review a social media strategy.
19. How to make recommendations to improve a social media strategy.
20. How to modify and customise a social media strategy.
21. How to document the performance and modifications made to a social media strategy, and why it is important to do so.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA39703**Establish a business brand presence on social media and online platforms**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to establish a business brand on social media and online platforms. It applies to individuals who manage social media accounts and are tasked with maintaining brand identity in online environments.

ELEMENT**PERFORMANCE CRITERIA***Candidates must be able to:*

- | | | | |
|----|--|-----|---|
| 1. | Identify social media and online platforms to be used for the business brand | 1.1 | Review the organisational social media strategy to determine approved social media and online platforms for building a business brand presence online. |
| | | 1.2 | Select the most suitable social media and online platforms for the business brand using industry best practices. |
| | | 1.3 | Devise and outline strategies for the use of new platforms or changes to existing platforms to build a business brand presence online. |
| 2. | Institute a business brand presence on social media and online platforms | 2.1 | Liaise with relevant personnel and assist where necessary with the set-up of the business brand online presence on the chosen social media and online platforms . |
| | | 2.2 | Liaise with relevant personnel to verify that the social media content developed for the introduction and establishment of the business brand meets legislative, industry and brand requirements. |
| | | 2.3 | Publish varied social media content which introduces and markets the business brand on the social media and online platforms in accordance with legislative, industry requirements and social media strategy. |
| | | 2.4 | Follow and maintain business brand guidelines when publishing posts to social media and online platforms . |

- 2.5 Use **social listening tools and methods** to **gauge** the response to and awareness of the business brand on **social media and online platforms**.
- 2.6 Respond to chatter generated to improve the overall business brand presence on **social media and online platforms**.
- 2.7 Respond to complaints received about the business brand in accordance with standard operating procedures.
- 2.8 Provide support to customers and obtain feedback/reviews from customers in accordance with the social media strategy and organisational policies and procedures.

RANGE STATEMENT

All range statements must be assessed:

1. Social media and online platforms may include but are not limited to:

- Networking sites e.g., Facebook, Twitter, LinkedIn
- Media sharing networks e.g., Instagram, Snapchat, YouTube
- Blogging/publishing Networks e.g., WordPress, Tumblr, Medium
- Discussion/forum sites e.g., Reddit, Quora, Digg
- Sharing economy networks
- Consumer review networks e.g. Yelp, Zomato, Trip Advisor
- Other platforms based on organisational needs and functions

3. Relevant personnel may include but are not limited to:

- Internal
- External

5. Content may include but is not limited to:

- Videos/reels
- Posts
- Stories
- Comments/replies
- Direct messages
- Reposted content from other user accounts

7. Gauge may include but is not limited to:

- Discover and interpret market trends, consumer insight on business brand
- Develop promotional strategies for the business brand
- Track business brand reputation

2. Strategies may include but are not limited to:

- Use of influencer
- Viral social media trends
- Audience interactivity and engagements (Q&A sessions, games and competitions)
- Content type and tone
- Posting schedules and calendars

4. Set up may include but is not limited to:

- Design social media profiles
- Configure platform tools, applications
- Create user accounts and platforms
- Develop business brand guidelines

6. Social listening tools and methods may include but are not limited to:

- Automated (using social media and analytical tools)
- Manual

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the legislative and industry requirements and organisational policies and procedures relevant to establishing a business brand on social media and online platforms.
2. What is a business brand and why it is important to have one.
3. What is your own job role and responsibility in relation to establishing a business brand on social media and online platforms.
4. What is a social media strategy and how to apply it to the business brand.
5. What are the social media and online platforms utilised by the business brand.
6. What is the criteria for selecting social media and online platforms for the business brand and how to do so.
7. Who are relevant personnel with whom to communicate regarding the business brand and how to contact them.
8. Who are persons responsible for:
 - designing social media and online platforms
 - creating content for social media and online platforms
 - configuring social media and online platforms and tools
 - creating user accounts for social media and online platforms
 - developing business brand guidelines
9. What is required to set up a business brand on social media and online platforms.
10. What type of social media content should be created and published for the business brand online and how to ensure it meets the legislative, industry and brand requirements.
11. How to publish social media content which introduces and markets a business brand on social media and online platforms.
12. What are the business brand guidelines, their components and how to follow and maintain them online.
13. What is chatter, the purpose of listening to it and how to listen online regarding the business brand.
14. Why it is important to listen to chatter online regarding the business brand.
15. How to respond to chatter regarding the business brand.
16. How to gauge the response to and awareness of the business brand on social media and online platforms.
17. What are complaints and how to respond to those regarding the business brand.
18. What is customer service and how to provide it on social media and online platforms.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA39803 Analyse the performance of the business brand on social media and online platforms

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to analyse the performance of the business brand on the social media and online platforms using analytical tools.

It requires the ability to evaluate and present reports on the effectiveness of the social media analytical tools in engaging customers.

ELEMENT	PERFORMANCE CRITERIA
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Candidates must be able to:

- | | | |
|---|-----|---|
| 1. Identify social media and analytical tools for social media and online platforms | 1.1 | Review the social media strategy to confirm the social media analytical tools for the social media and online platforms . |
| | 1.2 | Obtain approval, where necessary from relevant personnel , for the use of social media analytical tools specific to the social media and online platforms utilised by the organisation. |
| | 1.3 | Confirm that social media analytical tools are suitable for measuring the performance of the social media and online platforms in accordance with the social media strategy. |
| 2. Evaluate data collected from social media and online platforms | 2.1 | Gather data relevant to the type of analysis being conducted using social media analytical tools specific to the social media and online platforms in accordance with the social media strategy. |
| | 2.2 | Store data in the designated location in accordance with privacy and confidentiality standard operating procedures. |
| | 2.3 | Examine data using approved methodologies to measure the performance of the business brand on social media and online platforms based on the social media strategy. |

- 2.4 Prepare and present analytical **data** in the approved **report** format in accordance with standard operating procedures.
- 3. Evaluate the performance of the business brand on social media and online platforms
 - 3.1 Review, **report** and analyse the **performance of social media and online platforms** in accordance with organisational policies and procedures.
 - 3.2 Review **social media analytical tools** to determine their effectiveness in measuring the **performance** of the business brand.
 - 3.3 Make recommendations on how to improve the brand **performance**.
 - 3.4 Initiate and document improvements of brand **performance** over time in accordance with standard operating procedures.

RANGE STATEMENT

All range statements must be assessed:

1. Social media analytical tools may include but are not limited to:

- In-built
- External provider

2. Social media and online platforms may include but are not limited to:

- Networking sites e.g., Facebook, Twitter, LinkedIn
- Media sharing networks e.g., Instagram, Snapchat, YouTube
- Blogging/publishing Networks e.g., WordPress, Tumblr, Medium
- Discussion/forum sites e.g., Reddit, Quora, Digg
- Sharing economy networks
- Consumer review networks e.g. Yelp, Zomato, Trip Advisor
- Other platforms based on organisational needs and functions

3. Data may include but is not limited to:

- Qualitative
- Quantitative

4. Relevant personnel may include but are not limited to:

- Internal
- External

5. Store may include but not limited to:

- Digital
- Paper

6. Performance may include but not limited to:

- Successes in reaching and engaging customers for overall and targeted purposes
- Failures in reaching and engaging customers for overall and targeted purposes

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the organisational and legislative requirements applicable to the use of social media and online platforms.
2. What is a social media strategy and how to use it.
3. What are the social media and online platforms utilised by the organisation.
4. What are the inbuilt and external social media analytical tools for the social media and online platforms utilised by the organisation and how to use them.
5. What are the functions of the inbuilt and external analytical tools and how to use them for gathering social media data.
6. What is social media data and how to use it to measure and improve customer engagement and brand performance.
7. What are the types of data that can be generated to measure the performance of the business brand.
8. What are qualitative and quantitative data and how are they analysed and reported.
9. How to store social media data safely and securely.
10. Why it is important to analyse and present social media data and which methods are used to do so.
11. What are the approved formats for preparing and presenting social media data
12. How to interpret analytical data.
13. How to analyse the performance i.e. reach and engagement of the business brand based on analytical data gathered.
14. How to evaluate the effectiveness of the social media and online platforms analytical tools.
15. How to make improvements to the performance of the business brand.
16. How to document improvements made to the business brand performance and why it is important to document any improvements made.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA39903

Implement an online/social media promotional strategy for the business brand

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to plan, execute and monitor promotional campaigns and advertisements for a business brand on social media and online platforms.

This unit applies to persons managing social media accounts on a daily basis.

ELEMENT**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | | | |
|----|---|-----|--|
| 1. | Plan a promotional campaign for the business brand | 1.1 | Set goals and objectives for the promotional campaign for the business brand on social media and online platforms . |
| | | 1.2 | Identify the target audience and select the appropriate social media and online platforms to be used for promotional campaigns and advertisements. |
| | | 1.3 | Collaborate with relevant personnel to develop a promotional campaign for the business brand that incorporates suitable promotional strategies . |
| | | 1.4 | Develop an action plan for executing the promotional campaign for the business brand on social media and online platforms . |
| | | 1.5 | Identify budget and resource requirements for executing promotional campaigns for the business brand on social media and online platforms . |
| | | 1.6 | Schedule promotional campaigns and advertisements for the business brand on social media and online platforms . |
| 2. | Execute promotional campaigns on social media platforms | 2.1 | Develop promotional strategies to optimise engagement of the target audience. |

- 2.2 Publish promotional campaigns and advertisements for the business brand in accordance with business brand requirements, legislative and industry best practices.
 - 2.3 Monitor promotional campaigns and advertisements on **social media and online platforms** for customer engagement.
 - 2.4 **Engage** with the customer base throughout the duration of promotional campaigns and advertisements to measure performance of the business brand.
 - 2.5 Provide updates to the customer base on the business brand's **social media and online platform** accounts in accordance with organisational requirements.
3. Measure brand performance on social media and online platforms
- 3.1 Gather data on customer **engagement** prior to and after the execution of promotional campaigns and advertisements using approved analytical tools and methodologies.
 - 3.2 Compare data gathered to measure the business brand engagement experienced due to the promotional campaigns and advertisements on **social media and online platforms**.
 - 3.3 Use **engagement metrics** to verify how successful the business brand has been in engaging customers throughout promotional campaigns and advertisements on **social media and online platforms**.

RANGE STATEMENT

All range statements must be assessed:

1. Goals and objectives may include but are not limited to:

- Reach target audience
- Engage audience
- Promote brand

3. Relevant personnel may include but are not limited to:

- Internal
- External

2. Social media and online platforms may include but are not limited to:

- Networking sites e.g., Facebook, Twitter, LinkedIn
- Media sharing networks e.g., Instagram, Snapchat, YouTube
- Blogging/publishing Networks e.g., WordPress, Tumblr, Medium
- Discussion/forum sites e.g., Reddit, Quora, Digg
- Sharing economy networks
- Consumer review networks e.g. Yelp, Zomato, Trip Advisor
- Other platforms based on organisational needs and functions

4. Promotional strategies may include but are not limited to:

- Paid advertisements on specific platforms
- Influencers
- Social platform exclusive discounts
- Interactive competitions, contests and giveaways
- Referral programs
- Ambassador and loyalty programs
- Direct marketing (e.g., message blasts to groups of contacts or followers)
- Published content on specific platforms (e.g., posts, stories, lives, reels etc.)
- Content strategy (e.g. consistent visuals, distinct tone and brand voice, stickiness, virality etc.,)

5. Action plan may include but is not limited to:

- Promotional goals aligned to business objectives
- Target customer demographics (e.g., age, gender, location, socio-economic status, interests etc.,)
- Analysis of competitors
- Promotional/marketing strategies
- Schedule/timeline for content delivery
- Performance metric and KPI tracking

7. Engage may include but is not limited to:

- Obtaining perception of business brand
- Obtaining feedback on brand
- Boosting brand

6. Resources may include but are not limited to:

- Physical
- Human
- Financial

8. Engagement metrics may include but is not limited to:

- Tweets
- Hashtags
- Likes
- Followers
- Mentions
- Audience growth

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What does the acronym SMART represent.
2. What are SMART goals and objectives and how to set them for the business brand.
3. How to identify and optimise the target audience for the business brand online.
4. How to choose which social media and online platforms are to be used for promotional campaigns and advertisements.
5. What is a promotional campaign and its purpose.
6. What is an advertisement and the purpose of advertising the business brand online.
7. What are the different types of promotional campaigns from which the business brand would benefit.
8. What types of advertisements from which the business brand would benefit.
9. What are the benefits to be derived from executing promotional campaigns and advertisements.
10. How to develop promotional campaigns and advertisements specific to the business brand.
11. What are the business brand guidelines and how to comply with them when executing promotional campaigns and advertisements.
12. How to develop an action plan for executing promotional campaigns and advertisements for the business brand.
13. What is a budget and how to use a budget for promotional campaigns and advertisements.
14. What resources are required for executing promotional campaigns and advertisements.
15. How to monitor promotional campaigns and advertisements and provide updates throughout such.
16. Why it is important to monitor and provide updates throughout promotional campaigns and advertisements.
17. What are the legal, ethical, industry professional requirements specific to publishing promotional campaigns and advertisements to social media and online platforms and how to comply with these requirements.
18. What is customer engagement and optimisation and how to do so.
19. Why it is important to optimise customer engagement.
20. How to measure customer engagement on social media and online platforms.
21. What tools and methodologies are used for measuring customer engagement on social media and online platforms.
22. Why it is important to measure customer engagement, especially after executing promotional campaigns and advertisements.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA40003

Analyse and optimise the performance of social media and online platforms

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to identify, modify, improve and monitor the performance of client profiles on social media and other online platforms.

Candidates are expected to demonstrate the ability to use data analytics, benchmarking, optimisation strategies and social media testing in optimising client profiles on social media and online platforms.

ELEMENT**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | |
|---|--|
| 1. Audit social media and online platform performance | <p>1.1 Access client profiles on target social media and online platforms in accordance with organisational procedures.</p> <p>1.2 Identify primary social media objectives and other client requirements, confirm in consultation with the client and provide guidance on the suitability of target social media and online platforms.</p> <p>1.3 Collect relevant social media and online platform performance metrics from suitable data sources in accordance with industry best practices.</p> <p>1.4 Confirm relevant performance metrics to benchmark against competitor brands in accordance with client requirements and industry best practices.</p> <p>1.5 Remove unnecessary or irrelevant performance metrics before analysis to avoid erroneous outcomes in accordance with client objectives and industry best practices.</p> <p>1.6 Establish performance benchmarks that compare specific client performance metrics to that of competitor brands using relevant data sources.</p> |
|---|--|

- 1.7 Analyse collected client **performance metrics** against established performance benchmarks, client objectives and requirements.
 - 1.8 Prepare a report on audit and benchmarking outcomes and submit to the client.
 2. Prepare performance optimisation strategies
 - 2.1 Investigate the social media strategies of **competitor brands** with superior performance metrics in a manner that produces actionable insights into how client performance can be improved.
 - 2.2 Identify potential solutions to improve client **social media and online platform** performance and outline required resources in consultation with the client and **relevant personnel**.
 - 2.3 Set new targets for key **performance metrics** and corresponding timelines for their achievement on selected **social media and online platforms** in consultation with the client and **relevant personnel**.
 - 2.4 Identify and document specific **optimisation measures** for achieving new **performance metric** targets in accordance with client requirements and industry best practices.
 3. Implement optimisation measures for social media and online platforms
 - 3.1 Identify the most suitable **social media and online platforms** to be optimised.
 - 3.2 Seek approval where necessary with clients and **relevant personnel** to implement **optimisation measures**.
 - 3.3 Administer the rollout of proposed **optimisation measures** in the operation of client profiles across relevant **social media and online platforms** in accordance with client objectives and requirements.
 - 3.4 Check and confirm that all **optimisation measures** have been performed in accordance with client requirements.

- 3.5 Update required documentation in accordance with clients, industry best practices and organisational procedures.
- 4. Monitor and evaluate ongoing social media and online platform performance
 - 4.1 Align client profiles on **social media and online platforms** with an established social media strategy, **optimisation measures**, policies and procedures.
 - 4.2 Review and assess performance benchmarks and the impact of implemented **optimisation measures** using appropriate **social media testing methods** and relevant **data sources**.
 - 4.3 Confirm that performance targets and client objectives have been met and outline the effectiveness of implemented **optimisation measures** through analysis of social media test results.
 - 4.4 Modify **optimisation measures** and timelines, where required to improve suboptimal performance and make recommendations for continuous improvements in consultation with **relevant personnel**.
 - 4.5 Report on client **social media and online platform** performance and benchmarks at suitable intervals in accordance with industry best practices and standards for format, style and structure.

RANGE STATEMENT

All range statements must be assessed:

1. Social media and online platforms may include but are not limited to:

- Networking sites e.g., Facebook, Twitter, LinkedIn
- Media sharing networks e.g., Instagram, Snapchat, YouTube
- Blogging/publishing Networks e.g., WordPress, Tumblr, Medium
- Discussion/forum sites e.g., Reddit, Quora, Digg
- Sharing economy networks
- Consumer review networks e.g. Yelp, Zomato, Trip Advisor
- Other platforms based on organisational needs and functions

3. Performance metrics may include but are not limited to:

- Awareness (e.g. reach, impressions, audience growth rate, reposts, etc.)
- Engagement metrics (e.g. engagement rate, amplification rate, virality, etc.)
- Video metrics (e.g. views, video completion rates, etc.)
- Customer experience and service (e.g. customer satisfaction scores, net promoter scores, response rate & time, etc.)
- Return on Investment (ROI) (e.g. referrals, click-through rate, conversions, cost-per-click etc.)
- Share of voice
- Sentiment (e.g. mentions)

2. Social media objectives may include but are not limited to:

- Increasing brand awareness
- Increasing traffic to website
- Building/growing engaged communities
- Increasing sales of products and services
- Measuring or shaping brand sentiment
- Providing social/online customer service
- Targeting specific audiences to sell products and services

4. Data sources may include but are not limited to:

- Platform provided analytics tools
- External analytics tools
- Social media management tools

5. Computer brands may include but are not limited to:

- Industry wide
- Similar brands (e.g. similar size, age or location)
- Leading brands
- Individual brands

7. Optimisation measures may include but are not limited to:

- Profile redesign
- Content strategy (e.g. post frequency, consistent visuals, distinct tone and brand voice, stickiness, virality etc.)
- Social searchability (e.g. keywords, hashtags, call to action phrases)
- Link optimisation (e.g. UTM parameters, etc.)
- Shortening response times
- Industry influencers
- Paid social media advertising campaigns

6. Relevant personnel may include but are not limited to:

- Internal (e.g., editors, graphic artists, creatives etc.)
- External (e.g., consultants, clients, etc.,

8. Social media testing methods may include but are not limited to:

- Single variable
- Split
- Multivariable

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the policies, procedures, legislative, industry requirements and best practices for improving performance of social media and online platforms.
2. What are the various social media goals and objectives of a brand.
3. How to measure the performance of social media and online platforms.
4. What are the various data sources that can be used to measure social media and online platform performance metrics.
5. What is a social media strategy and how to create and implement one to achieve a specific goal.
6. What is the purpose of auditing a social media strategy.
7. What are the various social media and online platforms that can be used and how do their algorithms impact metrics, benchmarking and optimisation strategies.
8. What is benchmarking.
9. What are the purposes and the importance of performing benchmarking.
10. What are the industry best practices for social media benchmarking.
11. How to perform social media and online platform benchmarking.
12. What are the various metrics used to measure performance of social media and online platforms and how are they calculated.
13. How to devise potential solutions to improve client social media and online platform performance.
14. What are different types of optimisation measures that can be used to improve social media and online platform performance and how they can be implemented.
15. What are social media tests and why it is important to use them.
16. How to conduct social media tests.
17. How to measure the effectiveness of implemented optimisation measures on social media and online platform performance.
18. How to analyse social media test results to confirm that performance targets and client objectives have been met.
19. How and when to modify optimisation measures and timelines to improve suboptimal social media and online platform performance.
20. How to report on client social media and online platform performance and performance benchmarks.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Witness testimony
- Personal statement
- Written evidence (projects or assignments)
- Case study and scenario analysis
- Role play/simulation

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is, the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidates must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, products and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **must not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

UA40103

Comply with ethical, regulatory and professional standards

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to comply with ethical, regulatory and professional standards when using social media and online platforms for business purposes.

It applies to self-employed individuals and employees who work at all levels from operational through to managers.

ELEMENT**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | | | | |
|----|--|-----|-----|---|
| 1. | Establish ethical, regulatory and professional standards | and | 1.1 | Conduct research to confirm what information is considered copyright and how this information should be handled and used within social media business operations. |
| | | | 1.2 | Identify and interpret local and international ethical, regulatory and professional standards which are applicable to social media business operations. |
| | | | 1.3 | Confirm, with relevant personnel , the consequences of non-compliance with ethical, regulatory and professional standards in the online work environment. |
| | | | 1.4 | Determine and apply ethical, regulatory and professional standards specific to own job functions when using social media and online platforms in accordance with organisational procedures. |
| 2. | Adhere to ethical, regulatory and professional standards | and | 2.1 | Confirm with relevant personnel , that the social media content to be used online meets industry ethical, regulatory and professional standards. |
| | | | 2.2 | Seek specialist advice where necessary, to ensure that social media content to be used online is compliant with industry ethical, regulatory and professional standards. |

- 2.3 Work on social media and online platforms in accordance with ethical, regulatory and professional standards of the industry.
- 2.4 Monitor social media activities to ensure compliance with ethical, regulatory and professional standards.
- 2.5 Identify and rectify breaches to the ethical, regulatory and professional standards according to organisational procedures and within the limits of own authority.
- 2.6 Maintain confidentiality of sensitive information and **document** in accordance with organisational policies and procedures.

RANGE STATEMENT

All range statements must be assessed:

1. **Copyright** may include but is not limited to:
 - Your own
 - Someone else's
2. **Consequences** may include but is not limited to:
 - Penalties
 - Reputational damage
3. **Relevant personnel** may include but is not limited to:
 - Internal
 - External
4. **Document** may include but is not limited to:
 - Physical
 - Electronic

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What is copyright information, what it does and does not protect and how to identify, handle and use it within business operations.
2. What are the organisational policies and procedures relevant to ethical, regulatory and professional standards to be adhered to when working on social media and online platforms.
3. What are the local and international laws and ethical and professional standards with which to comply when working on social media and online platforms.
4. Who are relevant personnel and sources of specialist advice that can be sought when determining compliance of social media content with ethical, regulatory and professional standards and how to access and liaise with them.
5. How to comply with ethical, regulatory and professional standards when using social media and online platforms.
6. What are the consequences of non-compliance with ethical, regulatory and professional standards.
7. How to work safely and securely on social media and online platforms and why it is important to do so.
8. Why it is important to monitor social media activities for compliance with ethical, regulatory and professional standards and how to do so.
9. How to identify and rectify breaches to ethical, regulatory and professional standards within the online environment.
10. How to maintain and document confidentiality of sensitive information obtained from the use of social media and online platforms and why it is important to do so.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates have to prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

U92502

Maintain safe and effective working practices

Unit Descriptor:

This unit describes the knowledge, skills and attitudes required to function within health and safety standards. Candidates are required to demonstrate that they are able to work effectively and efficiently with colleagues, supervisors and customers. It also highlights the need for individuals to take responsibility for self-development in the workplace.

ELEMENT**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | | | |
|----|--|-----|---|
| 1. | Protect the safety of self and others in the workplace | 1.1 | Work according to training and instructions received to avoid risk to self and others. |
| | | 1.2 | Wear the appropriate personal protective equipment according to organisational procedures. |
| | | 1.3 | Use approved methods and handling equipment when moving and lifting items. |
| | | 1.4 | Use appropriate equipment and materials according to organisational requirements and manufacturer's instructions. |
| | | 1.5 | Return equipment and materials to designated storage when not in use. |
| | | 1.6 | Keep the immediate work area tidy and free from hazards. |
| | | 1.7 | Dispose of waste and in a designated area, in accordance with organisational procedures, and environmental and industry regulations. |
| | | 1.8 | Perform work in a manner which minimises environmental damage and contributes to the improvement of environmental work practices. |
| | | 1.9 | Report accidents, incidents or problems to appropriate persons promptly and take immediate action to reduce further danger. |

- 1.10 Carry out work in an organised and efficient manner in accordance with specified procedures.
- 2. Maintain working relationships with others
 - 2.1 Maintain appropriate and effective working relationships with **others**.
 - 2.2 Carry out activities requiring cooperation with **others** in accordance with required procedures.
 - 2.3 Handle disagreements in accordance with organisational procedures.
 - 2.4 Communicate in a manner that promotes effective working relationships.
- 3. Maintain and develop personal performance
 - 3.1 Take responsibility for tasks and activities in accordance with organisational requirements, either alone as part of a team.
 - 3.2 Seek advice from the appropriate person if clarification is required concerning specific tasks.
 - 3.3 Review **personal performance** and **development** with the appropriate person at suitable times.

RANGE STATEMENT

All range statement items must be assessed:

1. Personal protective equipment may include but is not limited to:

- Ear protection
- Gloves
- Footwear
- Overalls/coveralls
- Helmets/hats
- Eye protection

2. Equipment may include but is not limited to:

- Manual
- Electronic

3. Waste may include but is not limited to:

- Solid
- Liquids
- Hazardous/toxic

4. Others may include but is not limited to:

- Colleagues
- Supervisors
- Customers

5. Personal performance and development may include but is not limited to:

- Productivity
- Quality of work

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. How to carry out work activities avoiding risk to self and others.
2. What are the basic requirements of health and safety, other legislation and regulations that apply to the workplace.
3. What are the organisational requirements for the use of personal protective equipment.
4. How to select and use the correct personal protective equipment.
5. What is the relevant, up-to-date information on health, safety and security and how it applies in the workplace.
6. Why it is important to be alert to health, safety and security hazards.
7. What are the common health, safety and security hazards that affect persons working in this role and how these should be identified.
8. Why it is important to warn others about hazards and how to do so until the hazard is dealt with.
8. Why it is important to use safe lifting techniques.
9. What are the correct and safe ways to use equipment and materials required for work.
10. What are safe methods and areas for storing equipment and materials.
11. What are the organisational and legal requirements for disposing of waste.
12. What health and safety records may need to be kept and how to do so.
13. How the conditions under which you work can affect your efficiency and effectiveness and that of those around you.
14. What methods should be used to promote good environmental practice and to minimise environmental damage while working.
15. What procedures should be used for different types of emergencies in the industry.
16. Why it is important to develop and maintain effective working relationships and how to do so.
17. What procedures should be used in dealing with workplace disagreements.
18. Why it is important to communicate effectively and what are the available methods to do so.
19. How to maintain security in the work area.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** of the performance criteria, range and underpinning knowledge on **more than one occasion**. This evidence must come from a real working environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Witness testimony
- Written evidence (work records, reports)
- Professional discussion

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation may be used to cover **PCs 1.9 and 2.3**.

U78103**Communicate to develop and maintain networks and relationships**

Unit Descriptor:

This unit deals with the knowledge, skills and attitudes required to collect, analyse and communicate information and to use that information to develop and maintain effective working relationships and networks. The unit emphasises communication and representation.

ELEMENT**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | |
|--------------------------------------|--|
| 1. Communicate ideas and information | <ul style="list-style-type: none"> 1.1 Collect relevant information from appropriate sources, analyse and share with colleagues to improve performance. 1.2 Relay ideas and information in a manner appropriate to the recipient and specific needs. 1.3 Exchange information and resources with colleagues to ensure that all parties can work in an effective manner. 1.4 Implement consultation processes to encourage colleagues to contribute to issues related to their work and relay feedback to the team with regards to outcomes. 1.5 Implement processes to ensure that issues raised are referred to relevant personnel as required. |
| 2. Develop trust and confidence | <ul style="list-style-type: none"> 2.1 Identify, agree and respect the roles and responsibilities of colleagues. 2.2 Obtain and maintain the trust and confidence of colleagues through competent performance. 2.3 Fulfil and communicate agreements made with colleagues. |

- 2.4 Advise colleagues of difficulties and where agreements cannot be fulfilled.
- 3. Develop and maintain networks and relationships
 - 3.1 Establish working relationships with persons relevant to the work being carried out.
 - 3.2 Use **networks** to identify and build relationships.
- 4. Manage difficulties for positive outcomes
 - 4.1 Identify and analyse difficulties, conflicts of interest and disagreements and take action to resolve the situation in ways that minimise damage to the work being carried out.
 - 4.2 Provide feedback to colleagues on their performance and solicit feedback from colleagues on own performance to identify areas for improvement.
 - 4.3 Guide and support colleagues to resolve work difficulties.
 - 4.4 Review and improve **workplace outcomes** in consultation with **relevant personnel**.

RANGE STATEMENT

All range statements must be assessed:

1. Relay may include but is not limited to:

- In writing
- Verbally
- Non-verbally

2. Information may include but not is limited to:

- Data appropriate to work roles and organisational policies that is shared and retrieved in writing or verbally, electronically or manually such as:
 - archived, filed and historical background data
 - individual and team performance data
 - marketing and customer related data
 - planning and organisational documents including the outcomes of continuous improvement and quality assurance
 - policies and procedures

3. Consultation processes may include but are not limited to:

- Feedback to the work team and relevant personnel in relation to outcomes of the consultation process
- Opportunities for all employees to contribute to ideas and information about organisational issues

4. Processes may include but are not limited to:

- Conducting informal meetings
- Coordinating surveys or questionnaires
- Distributing newsletters or reports
- Exchanging informal dialogue with relevant personnel

5. Relevant personnel may include but are not limited to:

- Managers
- Occupational health and safety committee and other people with specialist responsibilities
- Other employees
- Supervisors

6. Networks may include but are not limited to:

- Established structures or unstructured arrangements and may include business or professional associations
- Informal or formal and with individuals or groups
- Internal and/or external

7. **Workplace outcomes** may include but are not limited to:

- Occupational health and safety processes and procedures
- Performance of the work team

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. How to use coaching and mentoring skills to provide support to colleagues.
2. What information should be collected and how to analyse and share this information.
3. What are the methods of communication with regards to the recipient.
4. What consultation methods can be used within the team.
5. How to network to identify and build relationships.
6. How to identify and analyse conflicts of interest and disagreements.
7. How to provide constructive feedback.
8. What methods can be used to provide guidance and support to colleagues.
9. What literacy skills are required to research, analyse, interpret and report information.
10. What relationship, management and communication skills are required to:
 - deal with people openly and fairly
 - forge effective relationships with internal and/or external customers and to develop and maintain these networks
 - gain the trust and confidence of colleagues
 - respond to unexpected demands from a range of people
 - utilise supportive and consultative processes effectively.
 - demonstrate respect for colleagues and their work
11. What is the relevant legislation and industry practice that affects business operations, especially in regard to occupational health and safety (OHS), environmental issues, industrial relations and anti-discrimination
12. What theories are associated with managing work relationships to achieve planned outcomes:
 - developing trust and confidence
 - maintaining fair and consistent behaviour in work relationships
 - understanding the cultural and social environment
 - identifying and assessing interpersonal styles
 - establishing, building and maintaining networks
 - identifying and resolving problems
 - resolving conflict
 - managing poor work performance
 - monitoring, analysing and introducing ways to improve work relationships.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, products and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

U12902**Deliver reliable customer service**

Unit Descriptor:

This unit is all about how you deliver consistent reliable service to customers as part of your job. As well as being good with people, you need to work with your organisation's service systems to meet and wherever possible, exceed customer expectations. In your job there will be many examples of how you combine your approach and behaviour with your organisation's systems to ensure that you:

- are prepared for each transaction
- deal with different types of customers under different circumstances
- check that what you have done has been effective.

When you have completed this unit you will have shown that you can deliver excellent customer service over and over again.

ELEMENT**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | |
|---|--|
| 1. Prepare to deal with your customers. | 1.1 Keep knowledge of products or services offered by the organisation up-to-date using information from colleagues and organisational literature. |
| | 1.2 Confirm that equipment used is in good and safe working order. |
| | 1.3 Confirm that the work area is tidy and that space is used in an efficient manner. |
| | 1.4 Prepare and arrange everything needed to deal with customers before the shift or period of work commences. |
| 2. Give consistent service to customers | 2.1 Make realistic commitments to customers regarding products or services during service delivery. |
| | 2.2 Make extra efforts to keep commitments to customers. |
| | 2.3 Inform customers when commitments cannot be kept due to unforeseen developments. |

- 2.4 Identify when customer's needs or expectations have changed and adjust service to meet new requirements.
 - 2.5 Refer customers to relevant persons or other organisations if unable to deal with their needs and expectations and keep them advised about what is happening.
- 3. Check customer service delivery
 - 3.1 Check that the service given meets customers' needs and expectations.
 - 3.2 Identify where better service could have been given to customers and how service could have been improved.
 - 3.3 Share relevant information with others to maintain the organisation's standards for service delivery.

RANGE STATEMENT

All range statements must be assessed:

- 1. Prepare and arrange** may include but is not limited to:
 - Tools and equipment
 - Consumables (wrapping papers, bags etc.)
 - Documentation
- 2. Customers** may include but are not limited to:
 - With clearly stated needs
 - Who are not clear about their needs and expectations
 - Who are unhappy with the level of service being provided
- 3. Service** may include but is not limited to:
 - During busy periods
 - During quiet periods
 - At times when people, systems or services have let you down
 - When working with colleagues
- 4. Identify** may include but is not limited to:
 - By inviting feedback from colleagues and managers on your performance
 - By asking customers for feedback directly
 - By examining written customer feedback

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are your customer's rights.
2. What are the specific aspects of:
 - a. health and safety
 - b. data protection
 - c. equal opportunity
 - d. disability discrimination, legislation and regulations that affect the way the products and services dealt with can be delivered to customers
3. What are the industry, organisational and professional codes of practice and ethical standards that affect the way the products or services dealt with can be delivered to customers
4. What are the contractual agreements, if any; customers have with the organisation.
5. What are the products or services of the organisation relevant to your own customer service role.
6. What are the guidelines laid down by the organisation that limits what can be done within own job role.
7. What are the limits of your own authority and when to seek agreement with or permission from others.
8. What are the organisational targets relevant to your own job, role in meeting them and the implications for the organisation if those targets are not met.
9. What are the organisational procedures and systems for delivering customer service.
10. What are the methods that your organisation uses or might use to measure its effectiveness in delivering customer service.
11. What systems are in place for checking service delivery.
12. How to communicate in a clear, polite confident way and why this is important.
13. How to deal with persons with diverse backgrounds and abilities (e.g. age, cultural, social and religious backgrounds).

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates must prove that they can carry out **all** of the elements, meeting **all** of the performance criteria, range and underpinning knowledge **on more than one occasion**. This evidence must come from a real working environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, product and manufacturing specifications, codes, standards, manuals and reference materials.

Simulation **should not be used**, except in exceptional circumstances where natural work evidence is unlikely to occur.

U83504**Lead your team**

Unit Descriptor:

This unit describes the knowledge, skills and attitudes required to provide direction to members of a team, motivate and support them to achieve both team objectives and individual work objectives.

ELEMENT**PERFORMANCE CRITERIA***Candidates must be able to:*

- | | |
|-------------------------|--|
| 1. Plan work | <ul style="list-style-type: none"> 1.1 Communicate the purpose and objectives of the team to members. 1.2 Involve team members in planning how the team will achieve its objectives. 1.3 Give team members individual work objectives and ensure that they understand how these contribute to achieving team and organisational objectives. |
| 2. Support team members | <ul style="list-style-type: none"> 2.1 Encourage team members to achieve individual work objectives and those of the team and give recognition when objectives have been achieved. 2.2 Guide team members through difficulties and challenges. 2.3 Acknowledge creativity and innovation within the team. 2.4 Empower team members to develop their own ways of working and to make decisions within agreed boundaries. 2.5 Encourage team members to take responsibility for their development needs. 2.6 Provide support and advice to team members when required, especially during periods of setback and change. 2.7 Motivate team members to present their own ideas and listen to their ideas. |

- 2.8 Encourage team members to take the lead when they have the knowledge and expertise and show a willingness to accept leadership.
- 2.9 Obtain the trust and support of team members in response to the leader's support and behaviour.

RANGE STATEMENT

All range statements must be assessed:

1. Purpose may include but is not limited to:

- Assuring that objectives have been achieved
- Assuring that quality and customer requirements have been met
- Appraising team or individual performance
- Recognising competent performance and achievement

2. Team members may include but are not limited to:

- Persons for whom you have line responsibility

3. Planning may include but is not limited to:

- Short-term
- Medium-term
- Long-term

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the different ways of communicating effectively with members of a team.
2. How to set objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound).
3. How to plan for the achievement of team objectives and the importance of involving team members in this process.
4. What is the importance of demonstrating to team members how personal work objectives contribute to the achievement of team objectives.
5. How to get and make use of feedback from others on own leadership performance and style of leadership.
6. How to select and successfully apply methods for motivating, supporting and encouraging team members and acknowledging their achievements.
7. What are the types of difficulties and challenges that may arise and the ways in which these can be identified and addressed.
8. Why it is important to encourage others to take the lead and the ways in which this can be achieved.
9. How to encourage and recognise creativity and innovation within a team.
10. Who are the individuals within your own team, their roles, responsibilities, competencies and potential.
11. What are your team's purpose, objectives and plans.
12. What are the personal work objectives of own team members.
13. What are the types of support and advice that team members are likely to need and how to respond to those needs.

EVIDENCE GUIDE

For assessment purposes:

(1) Critical Aspects of Evidence

Candidates have to prove that they can carry out **all** of the elements, meeting **all** the performance criteria, range and underpinning knowledge **on more than two occasions**. This evidence must come from a real work environment.

(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

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Simulated activities **are not** permitted for this unit.

U92702**Craft a personal entrepreneurial strategy**

Unit Descriptor:

This unit deals with the skills and knowledge required to craft an entrepreneurial strategy that fits with the attitudes, behaviours, management competencies and experience necessary for entrepreneurs to meet the requirements and demands of a specific opportunity.

ELEMENT**PERFORMANCE CRITERIA**

Candidates must be able to:

- | | |
|--|---|
| 1. Establish the nature of entrepreneurship | 1.1 Define concepts associated with entrepreneurship. |
| | 1.2 Identify and explain factors which influence entrepreneurship locally and regionally. |
| | 1.3 Explain the importance of entrepreneurship to economic development and employment. |
| | 1.4 Present the findings of research conducted on entrepreneurial ventures and successes in the Caribbean region in the appropriate format. |
| | 1.5 State the difference between wage employment and entrepreneurial ventures. |
| 2. Identify and assess entrepreneurial characteristics | 2.1 Carry out relevant research and identify required entrepreneurial characteristics. |
| | 2.2 Assess and rank identified entrepreneurial characteristics. |
| | 2.3 Apply the process and disciplines that will enable an individual to evaluate and shape choices and initiate effective action. |
| | 2.4 Identify factors that will help an entrepreneur to manage the risk and uncertainties of the future, while maintaining a future orientated frame of mind. |

- 3. Develop a self-assessment profile
 - 3.1 Use self-assessment tools/methods to identify personal entrepreneurial potential.
 - 3.3 Apply creative problem-solving techniques and principles to resolve business related problems.
 - 3.3 Obtain appropriate feedback from others for the purpose of becoming aware of blind spots and for reinforcing or changing existing perceptions of strengths or weaknesses.

- 4. Craft an entrepreneurial strategy
 - 4.1 Develop a profile of the past that includes accomplishments and preferences in terms of like and work styles, coupled with a look into the future and an identification of what one would like to do.
 - 4.2 Identify areas for development to determine and identify **management competencies..**
 - 4.3 Develop written guidelines to solicit feedback to facilitate reviews, that is honest, straightforward, and helpful but not all positive or negative.
 - 4.4 Develop a framework and process of setting goals which demand time, self-discipline, commitment, dedication and practice.
 - 4.5 Establish goals that are specific and concrete, measurable, relate to time, realistic and attainable.
 - 4.6 Establish how priorities including identifying conflict and trade-offs and determine how these may be resolved.
 - 4.7 Identify potential problems, obstacles and risks in meeting goals.
 - 4.8 Identify specific action steps that are to be performed in order to accomplish goals.

- 4.9 Indicate the method by which results will be measured.
- 4.10 Establish milestones for reviewing progress and tie these to specific dates on a calendar.
- 4.11 Identify sources of help to obtain resources.
- 4.12 Demonstrate evidence of the ability to review process and periodically revise goals.

RANGE STATEMENT

All range statements must be assessed:

1. Concepts may include but are not limited to:

- Risk
- Entrepreneurship
- Macro-screening
- Micro-screening
- Competition
- Wage employment

2. Factors may include but are not limited to:

- Market conditions
- Markets – demand/supply
- Global trends
- Level of economic activities
- Funding
- Economic stability
- Social stability
- Resources available

3. Management competencies may include but are not limited to:

- Commitment
- Determination and perseverance
- Orientation towards goals
- Taking initiative
- Accepting personal responsibility

UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What is a personal entrepreneurial profile system.
2. What are the following effective management systems
 - marketing
 - operations/productions
 - finance
 - administration
 - law
3. How to measure feedback.
4. What are the methods for developing a personal business plan.
5. What is the difference between an entrepreneurial and management culture.
6. How to determine barriers to entrepreneurship.
7. How to minimise exposure to risk.
8. How to exploit available resources.
9. How to tailor a reward system to meet a particular situation.
10. How to effectively plan and execute activities.
11. How to use computer technology to undertake assessments.

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(2) Methods of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence may be collected in a variety of ways including:

- Products of work
- Observation
- Written/oral questioning
- Written evidence
- Witness testimony
- Professional discussion

Questioning techniques should not require language, literacy or numeracy skills beyond those required in this unit of competency.

(3) Context of Assessment

This unit may be assessed on the job, off the job or a combination of both. Where assessment occurs off the job, that is the candidate is not in productive work, then an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by a candidate working alone or as part of a team. The assessment environment should not disadvantage the candidate.

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Assessment methods

The methods which can be used to determine competence in performance and underpinning knowledge.

Assessors

The Assessor's role is to determine whether evidence presented by a candidate for assessment within the programme, meets the required standard of competence in the relevant unit or element. The Assessor needs to be competent to assess to national standards in the area under assessment.

Approved Centre

Organisation/Centre approved by the TVET Council to offer full National Vocational Qualifications.

Case Studies

In situations where it is difficult for workplace assessment to take place, case studies can offer the candidate an opportunity to demonstrate potential competence.

A case study is a description of an actual or imaginary situation presented in some detail. The way the case study is presented will vary depending upon the qualification, but the most usual methods are written, taped or filmed.

The main advantage of a case study is the amount of evidence of underpinning knowledge they can generate and the specific nature of the evidence produced.

Competence

In the context of vocational qualifications, competence means: the ability to carry out prescribed activities to nationally pre-determined standards in an occupation. The definition embraces cognitive, practical and behavioural skills, underpinning knowledge and understanding and the ability to react appropriately in contingency situations.

Element

An element is a description of an activity which a person should be able to do. It is a description of an action, behaviour or outcome which a person should be able to demonstrate.

Explanation of NVQ Levels

NVQs cover five (5) levels of competence, from entry level staff at Level 1 through to senior management at Level 5.

Level 1 - Entry Level

Recognises competence in a range of varied work activities performed in a variety of contexts. Most work activities are simple and routine. Collaboration with others through work groups or teams may often be a requirement. Substantial supervision is required especially during the early months evolving into more autonomy with time.

Level 2 - Skilled Occupations:

Recognises competence in a broad range of diverse work activities performed in a variety of contexts. Some of these may be complex and non-routine and involve some responsibility and autonomy. Collaboration with others through work groups or teams and guidance of others may be required.

Level 3 - Technician and Supervisory Occupations:

Recognises competence in a broad range of complex, technical or professional work activities performed in a wide variety of contexts, with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources are often a requirement. The individual is capable of self-directed application, exhibits problem solving, planning, designing and supervisory capabilities.

Level 4 - Technical Specialist and Middle Management Occupations:

Recognises competence involving the application of a range of fundamental principles and complex techniques across a wide and unpredictable variety of contexts. Requires very substantial personal autonomy and often significant responsibility for the work of others, the allocation of resources, as well as personal accountability for analysis, diagnosis, design, planning, execution and evaluation.

Level 5 - Chartered, Professional and Senior Management Occupations:

Recognises the ability to exercise personal professional responsibility for the design, development or improvement of a product, process, system or service. Recognises technical and management competencies at the highest level and includes those who have occupied positions of the highest responsibility and made outstanding contribution to the promotion and practice of their occupation.

External Verifier

The External Verifier is trained and appointed by the TVET Council and is competent to approve and ensure an approved Centre's quality of provision.

Internal Verifier

The Internal Verifier acts in a supporting role for Assessors to ensure consistent quality of assessment and competence. They need to be competent to assess to national standards in the area under assessment.

NVQ

National Vocational Qualifications (NVQs) are work-based qualifications that assess an individual's competence in a work situation and certify that the individual can perform the work role to the standards expected in employment.

NVQs are based on national occupational standards of competence drawn up by standards-setting bodies known as Industry Lead Bodies. The standards describe the level and breadth of performance that is expected of persons working in the industry or sector which the NVQ covers.

NVQ Coordinator

Within each approved Centre offering NVQs, there is a centre contact who has overall responsibility for the operation and administration of the NVQ system.

Observation

Observation of the candidate carrying out his/her job in the workplace is the assessment method recommended in the vast majority of units and elements. Observation of staff carrying out their duties is something that most supervisors and managers do every day.

Performance criteria

Performance criteria indicate what is required for the successful achievement of an element. They are descriptions of what you would expect to see in competent performance.

Product of Work

This could be items produced during the normal course of work, which can be used for evidence purposes such as reports, menus, promotional literature, training plans, etc.

Questioning

Questioning is one of the most appropriate ways to collect evidence to assess a candidate's underpinning knowledge and understanding.

Questioning can also be used to assess a candidate in those areas of work listed in the range which cannot be assessed by observation. Guidance on when this assessment method can be used is given in the assessment guidance of each individual element.

As an assessment method, questioning ensures the Assessor has all of the evidence about a candidate's performance. It also allows you to clarify situations.

Range statements

The range puts the element of competence into context. A range statement is a description of the range of situations to which an element and its performance criteria is intended to apply.

Range statements are prescriptive therefore each category must be assessed.

Role-play

Role-plays are simulations where the candidate is asked to act out a situation in the way he/she considers "real" people would behave. By using role-play situations to assess a candidate you are able to collect evidence and make a judgment about how the candidate is most likely to perform. This may be necessary if the range specified includes a situation in which the candidate is unlikely to find himself/herself in the normal course of their work, or where the candidate needs to develop competence, before being judged competently, for example, in a disciplinary situation,

Simulation

Where possible, assessment should always be carried out by observing **natural performance** in the workplace. **Simulated performance** however, can be used where specified to collect evidence about an aspect of the candidate's work which occurs infrequently or is potentially hazardous, for example, dealing with fires.

By designing the simulated situation, briefing the candidate and observing his/her performance, you will be able to elicit evidence which will help you judge how a candidate is **most likely** to perform in real life.

Supplementary evidence

Supplementary evidence can be used to confirm and support performance evidence. Types of supplementary evidence include witness testimonies, reports, journals or diaries, records of activities, personal statements, simulation (see note in glossary).

Underpinning knowledge

Underpinning knowledge indicates what knowledge is essential for a person to possess in order to successfully achieve an element and prove total competence.

Units

A unit of competence describes one or more activities which form a significant part of an individual's work. Units are accredited separately but in combination can make up a vocational qualification. There are three categories of units:

Mandatory units - are core to a qualification and must be completed.

Optional units - candidates must choose the required number of individual units, specified in the qualification structure, to achieve the qualification.

Work-based projects

Work-based projects are a useful way for you to collect evidence to support any decision you make about a candidate's performance. They are particularly appropriate in determining the level of a candidate's underpinning knowledge and understanding where it may be insufficient to rely only on questioning observation.

A project often involves the identification of a solution to a specific problem identified by you and/or the candidate (such as looking at ways to redress a recent drop in sales) or may be a structured programme of work built around a central situation or idea (such as the introduction of a new job rostering process).