QUALIFICATION SPECIFICATION





Diploma in Procurement (Level 6)





This qualification specification covers the following qualification/s:

Qualification Number	Qualification Title
601/4110/4	Gateway Qualifications Level 6 Diploma in Procurement

Version and date	Change detail	Section/Page Reference
1.0 (Jan 2020)	n/a	n/a
1.1 (June 2020)	Front, back covers and RPL statement updated.	n/a
1.2 (April 2021)	Qualification approval from Qualifications Wales removed.	Pg7 and 9
1.3 (Jan 2023)	Removed address and back cover	Page



About this qualification specification

This qualification specification is intended for tutors, assessors, internal quality assurers, centre quality managers and other staff within Gateway Qualifications recognised centres and/or prospective centres.

It sets out what is required of the learner in order to achieve the qualification. It also contains information specific to managing and delivering the qualification(s) including specific quality assurance requirements.

The specification should be read in conjunction with the Gateway Qualifications Centre Handbook and other publications available on the website which contain more detailed guidance on assessment and verification practice.

In order to offer the qualification/s within this specification you must be a Gateway Qualifications recognised centre and be approved to deliver the qualification/s.

If your centre is not yet recognised and/or not yet approved to deliver the qualification, please contact our Development Team:

Telephone: 01206 911211

Email: enquiries@gatewayqualifications.org.uk

Website: <u>www.gatewayqualifications.org.uk/advice-guidance/delivering-our-</u>

qualifications/become-recognised-centre/



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1. Qualification Information

1.1 About the qualification/s

The qualifications have been approved by the Office of Qualifications and Examinations Regulation (Ofqual) that regulates qualifications, examinations and assessments in England.

The Gateway Qualifications Level 6 Diploma in Procurement has been developed in consultation with various stakeholders including the relevant Sector Skills Council (Skills for Logistics) and Training Providers. The qualifications are supported by employers including a government agency and a local police authority.

These qualifications will be suitable for learners in the following roles:

- Strategic / senior /purchasing or procurement manager
- Head of commercial
- Supply chain manager
- Head of logistics / transport
- Operations manager
- Senior Procurement Advisor
- Head of Procurement/Purchasing
- Senior Procurement Specialist

Senior Buyer/Category Manager

1.2 Objective

The objective of the Gateway Qualifications Level 6 Diploma in Procurement is to confirm occupational competence of those in management roles in Procurement.

1.3 Funding

For information on potential sources of funding in England please visit the Education and Skills Funding Agency:

https://www.gov.uk/government/organisations/education-and-skills-funding-agency

https://www.gov.uk/government/collections/gualifications-approved-for-public-funding

https://hub.fasst.org.uk/Pages/default.aspx

The qualification is listed on S96 as available for delivery to young people aged less than 19 years old (refer to Section 2.1 Age for approval age range of this qualification.

1.4 Geographical coverage

This/these qualification/s has/have been approved by Ofqual to be offered in England.



If a centre based in Northern Ireland or overseas (including Scotland) would like to offer this qualification, they should make an enquiry to Gateway Qualifications.

1.5 Progression opportunities

The qualifications form part of a suite of Procurement qualifications at Levels 3, 4, 5 and 6. Learners who complete this qualification could progress to a Level 7 Management qualification.

1.6 Equality, diversity and inclusion

It is Gateway Qualifications' aim that there shall be equal opportunities within this organisation and in all the services it provides and within its recognised centres and via the services they provide and so meet the organisation's legal responsibilities to prevent discrimination.

In particular it is the organisation's intention that there should be no discrimination on the grounds of a protected characteristic including age, disability, gender assignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex, sexual orientation. It is acknowledged that this is not an exhaustive list.



2. Learner Entry Requirements

2.1 Key information

Qualification Titles	
Age	The approved age range for these qualifications is: 19+
Prior qualifications or units	There is no requirement for learners to have achieved prior qualifications or units. However, learners may have completed the Level 5 Diploma in Procurement
Prior skills/knowledge/ understanding	The prior skills knowledge and understand that a learner should have to undertake this qualification are not specified. Learners undertaking the Level 6 Diploma in Procurement are likely to have experience in the work place in a day to day purchasing role.
Restrictions	There are no restrictions to entry.
Additional requirements/guidance	There are no additional rules or guidance regarding learner entry requirements.

2.2 Access to qualifications for learners with disabilities or specific needs

Gateway Qualifications and recognised centres have a responsibility to ensure that the process of assessment is robust and fair and allows the learner to show what they know and can do without compromising the assessment criteria.

Gateway Qualification has a duty to permit a reasonable adjustment where an assessment arrangement would put a disabled person at a substantial disadvantage in comparison to someone who is not disabled. Please refer to Section 4.11 Access Arrangement, Reasonable Adjustments and Special Considerations for further details

2.3 Recruiting learners with integrity

It is vital that centres recruit with integrity with regard to qualifications. Centres must ensure that learners have the correct information and advice on their selected qualification(s) and that the qualification(s) will meet their needs.

The recruitment process must include the centre assessing each potential learner and making justifiable and professional judgements about the learner's potential to successfully complete the assessment and achieve the qualification. Such an assessment must identify, where appropriate, the support that will be made available to the learner to facilitate access to the qualification(s).



3. Achieving the Qualification

3.1 Achievement methodology

The qualification will be awarded to learners who successfully achieve an approved combination of units through a Portfolio of Evidence that has been successfully verified and monitored through Gateway Qualifications' Quality Assurance process.

Achievement is therefore determined by successful completion of unit assessment with no further requirement for additional/summative assessment.

3.2 Qualification Size

Qualification Title	Total Qualification Time		Credit Value
Gateway Qualifications Level 6 Diploma in Procurement	600	282	60

Total Qualification Time is the number of notional hours which represents an estimate of the total amount of time that could be reasonably expected to be required for a Learner to achieve and demonstrate the achievement of the level of attainment necessary for the award of the qualification.

Total Qualification Time is comprised of the following two elements:

- the number of hours which an awarding organisation has assigned to a qualification for Guided Learning, and
- an estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place by – but, unlike Guided Learning, not under the Immediate Guidance or Supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

3.3 Qualification structure

The knowledge, skills and understanding that will be assessed as part of the qualification are set out within the unit specifications published on the Gateway Qualifications website and available to download from the qualification library in the online system Prism. These include the learning outcomes and associated assessment criteria.

For information on Recognition of Prior Learning/Exempt and Equivalent units please see section 3.4 Recognition of Prior Learning (RPL)/Exemptions/Equivalencies.



Gateway Qualifications Level 6 Diploma in Procurement

Learners must achieve a minimum of 60 credits including four mandatory units totalling 31 credits from group M (Mandatory), a minimum of three units worth at least 18 credits from group OA and remaining credits from either group OA or group OB.

Mandatory Group

Learners must achieve the four mandatory units totalling 31 credits from group this group.

Unit Number	Unit Title	Level	Guided Learning	Credit Value
R/506/6149	Develop a Supply Chain Strategy	6	40	8
L/506/6151	Establish and Manage Strategic Relationships within Procurement	6	40	8
J/506/6150	Implement a Supply Chain Strategy	6	40	8
Y/506/6153	Provide Leadership and Direction for an Organisation	6	35	7

Optional Group A

Learners must achieve a minimum of three units worth at least 18 credits from group Optional Group A and remaining credits from either group Optional Group A or group Optional Group B.

Unit Number	Unit Title	Level	Guided Learning	Credit Value
M/506/6157	Develop and Implement a Corporate Social Responsibility Process for the Supply Chain	6	35	6
R/506/6197	Develop and Implement Model Forms of Contract for Procurement	6	40	6
K/506/5279	Develop Sustainability in the Supply Chain	5	35	6
T/506/6158	Manage a Global Sourcing Process	6	35	7
D/506/6154	Manage a Programme of Complementary Projects	6	30	8
A/506/6162	Measure and Benchmark the Performance of Procurement	6	30	6
A/506/6159	Outsource Organisational Processes	6	40	8
K/506/6156	Strategic Contracting in Procurement	6	35	7
D/506/6199	Undertake Negotiations for Strategic Requirements	6	30	6



Optional Group B

Learners must achieve a minimum of three units worth at least 18 credits from group Optional Group A and remaining credits from either group Optional Group A or group Optional Group B.

Unit Number	Unit Title	Level	Guided Learning	Credit Value
D/506/6168	Implement Lead Role Purchasing within an Organisation	6	40	6
D/506/6166	Lead Innovation within an Organisation	6	32	8
Y/506/6198	Manage Finance for Procurement	6	35	6
D/504/8043	Mobilising and Managing Teams	6	110	12
L/506/6201	Organisational Culture	6	30	5

3.4 Recognition of prior learning

Recognition of Prior Learning (RPL) provides learners and Centres with an alternative assessment method by which a learner's previous achievements can meet the assessment requirements for a unit/qualification through the knowledge, understanding or skills that they already possess and so, do not need to develop these through a course of learning.

It enables the recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable to contribute to a unit, units or a whole qualification according to the RPL criteria for a given qualification.

The recognition of prior learning is permitted for this qualification and includes the prior attainment of units on a qualification offered by Gateway Qualifications, e.g. where a learner progresses from a smaller qualification to a larger qualification and where the qualifications have shared content such as an Award, Certificate and/or Diploma.

Centres should refer to the Gateway Qualifications' Recognition of Prior Learning policy and follow the process available on the website.

3.5 Links to other qualifications

The qualifications form part of a suite of Procurement qualifications at Levels 3, 4, 5 and 6.



4. Assessment and Quality Assurance

The following are in addition to the standard assessment and quality assurance requirements set out in the Gateway Qualifications Centre Handbook.

4.1 Method of assessment

The method of assessment for the qualification is through a portfolio of evidence.

Learners must have access to a relevant workplace as there is a requirement for assessment to be undertaken in the workplace.

4.2 Assessment language

This qualification is assessed in English only.

4.3 Assessment materials

There are no specific assessment materials provided for this qualification.

4.4 Access Arrangements, Reasonable Adjustments and Special Considerations

Gateway Qualifications and recognised centres have a responsibility to ensure that the process of assessment is robust and fair and allows the learner to show what they know and can do without compromising the assessment criteria.

Gateway Qualification has a duty to permit a reasonable adjustment where an assessment arrangement would put a disabled person at a substantial disadvantage in comparison to someone who is not disabled.

The following adaptations are examples of what may be considered for the purposes of facilitating access, as long as they do not impact on any competence standards being tested:

- adapting assessment materials;
- adaptation of the physical environment for access purposes;
- adaptation to equipment;
- assessment material in an enlarged format or Braille;
- assessment material on coloured paper or in audio format;
- British Sign Language (BSL);
- changing or adapting the assessment method;
- changing usual assessment arrangements;
- extra time, e.g. assignment extensions;
- language modified assessment material;
- practical assistant;
- prompter:
- providing assistance during assessment;



- reader;
- scribe;
- transcript;
- use of assistive software;
- using assistive technology;
- use of CCTV, coloured overlays, low vision aids;
- use of a different assessment location;
- use of ICT/responses using electronic devices.

It is important to note that not all of the adjustments (as above) will be reasonable, permissible or practical in particular situations. The learner may not need, nor be allowed the same adjustment for all assessments.

Learners should be fully involved in any decisions about adjustments/adaptations. This will ensure that individual needs can be met, whilst still bearing in mind the specified assessment criteria for a particular qualification.

A reasonable adjustment for a particular learner may be unique to that individual and may not be included in the list of available access arrangements specified above.

Special Considerations

Requests for special consideration should be submitted as soon as possible. Please refer to the <u>Reasonable Adjustments and Special Consideration Policy</u>.

5. Centre Recognition and Qualification Approval

5.1 Centre Recognition

Both centre recognition and qualification approval must be gained before centres are permitted to deliver these qualifications. Guidance on the centre recognition and qualification approval processes is available on the website:

https://www.gatewayqualifications.org.uk/advice-guidance/help-admin-tasks/centre-recognition/

5.2 Qualification-specific centre requirements

Centres must ensure that they have the appropriate resources in place when delivering performance units from vocational areas.

Learning in the Work Place

Where delivery of a unit is in the work place, centres are required to exercise due diligence in respect of the following:

- Risk assessments
- Health and safety requirements

Provision of appropriate learning experience



5.3 Qualification-specific tutor/assessor requirements

Tutors/Assessors must be fully qualified and experienced in the sector in which they are delivering, details of which must be provided to Gateway Qualifications as part of the Qualification Approval application.

6. Quality Assurance

6.1 Qualification-specific quality assurance requirements

There are no additional internal/external quality assurance requirements for this qualification.

6.2 Malpractice

Malpractice is any deliberate activity, neglect, default or other practice that compromises the integrity of the internal and external assessment process, and/or the validity of certificates. It covers any deliberate actions, neglect, default or other practice that compromises, or could compromise:

- the assessment process
- the integrity of a regulated qualification
- the validity of a result or certificate
- · the reputation and credibility of Gateway Qualifications
- the qualification to the public at large.

Centre staff should be familiar with the contents of Gateway Qualifications Malpractice and Maladministration Policy, https://www.gatewayqualifications.org.uk/wp-content/uploads/2017/10/Malpractice-and-Maladministration-Policy.pdf

6.3 Additional requirements/guidance

There are no additional requirements that learners must satisfy in order for assessment to be undertaken and the unit/qualification to be awarded.



7. What to do next

For existing centres please contact your named Development Manager or Development Officer.

Tel: 01206 911211

Email: enquiries@gatewayqualifications.org.uk

8. Gateway Qualifications

Gateway Qualifications, a not for profit registered charity, is an Awarding Organisation based in Colchester.

We work with learning providers and industry experts to design and develop qualifications that benefit the learner and the employer.

We support flexible, responsive and quality assured learning opportunities whether it's in the classroom, at work, in the community or through distance learning.

We are recognised by Ofqual, to design, develop and submit qualifications to the Regulated Qualifications Framework (RQF) and Qualification Wales to offer regulated qualifications in Wales.



9. Appendices

9.1 Appendix 1 – Unit Details

Develop a Supply Chain Strategy

Level: Level 6

Credit Value: 8
GLH: 40

Unit Number: R/506/6149

This unit will help learners to understand organisational strategies and

Unit Aim: how they link to supply chain strategy. It helps learners to develop a

supply chain strategy through gap analysis, option appraisal,

stakeholder communication and strategic choice.

This unit has 5 learning outcomes.

LE	EARNING OUTCOMES	ASSESSMENT CRITERIA	
Th	ne learner will:	The learner can:	
1	Understand how a supply chain strategy can support organisational strategy.	1.1 Explain how a supply chain strategy can support organisational strategy.	
2	Be able to review a current supply chain strategy.	2.1 Evaluate a current supply chain strategy against organisational objectives.2.2 Critically appraise shortfalls and gaps in the current supply chain strategy using appropriate analytical techniques.	
3	Be able to determine options for supply chain strategy development.	 3.1 Generate a range of options to fill supply chain gaps. 3.2 Critically evaluate options against risk, cost and opportunity. 3.3 Recommend preferred option for supply chain strategy development. 	



LEARNING OUTCOMES		ASSESSMENT CRITERIA		
The learner will:		The learner can:		
4	Be able to develop supply chain strategy and communicate to stakeholders.	4.1 Produce draft strategy with SMART objectives.4.2 Communicate draft strategy with rationale to stakeholders.		
5	Be able to agree supply chain strategy with stakeholders.	5.1 Revise strategy in light of stakeholder feedback.5.2 Gain commitment from stakeholders to implement the supply chain strategy.		



Indicative Content: Develop a Supply Chain Strategy

Learning Outcome 1:

How supply chain strategy supports organisational strategy

- How supply chain strategy links to organisational generic strategies
- Cost reduction strategy initiatives in the supply chain
- Risk reduction strategy initiatives in the supply chain
- Lean and agile supply chains
- Supply chain supplier innovation strategies
- Category management and supplier relationship management strategies and their impact on organisational strategy
- Mckinsey's 7 S framework aligned to supply chain strategy
- How supply chain strategy supports acquisition, diversification and new markets corporate strategies

Learning Outcome 2:

Review supply chain strategy against organisational objectives:

- Current organisational strategy document
- Current supply chain strategy document
- Strategic fit analysis
- Benchmarking current strategy against "where do we want to be"

Shortfalls and gaps in current supply chain strategy:

- Areas where current strategy has not met targets
- Areas where a strategy does not exist
- Areas where current strategy needs to be changed
- Strategy gap analysis

Learning Outcome 3:

Generate a range of options:

- Supplier relationship options (portfolio analysis/relationship continuum)
- Supply sources options including supply markets and network sourcing
- Supply chain and materials management options
- Supply base management options including rationalisation
- Infrastructure options including systems
- Organisational choice options including centralisation, delegation, CLAN, SCAN, Federal lead role and category management

Evaluate each option:

 Evaluation of options against ability to deliver reductions in cost and risk and/or deliver opportunity and innovation in the supply chain to support organisational strategy



Indicative Content: Develop a Supply Chain Strategy

- Option appraisal models such as STEEPLE, Industry analysis, SWOT, Force Field analysis, total cost of ownership, stakeholder mapping, financial analysis, cultural web and "what if" scenarios
- Option evaluation of sustainability, acceptability and feasibility

Preferred option:

- Ranked options based upon least risk v maximum return
- Chosen preferred options to achieve overall strategy

Learning Outcome 4:

Produce draft strategy:

- Rationale for strategy linked to organisational strategy goals
- Goals of supply chain strategy with timescales
- Infrastructure and process components of strategy
- Timescales, milestones and key performance indicators for strategy
- Roles of key players including procurement, internal stakeholders and external stakeholders in delivering the strategy
- Resources and up-skilling required to deliver the strategy
- Budget and management accounting requirements for strategy implementation
- Stakeholder mapping and stakeholder roles
- Strategy authorisation requirements

Present strategy to key stakeholders:

- Circulation of draft strategy to stakeholders
- Presentation of draft strategy to stakeholders
- Dialogue with key stakeholders

Learning Outcome 5:

Revise strategy:

- Strategy amendments
- Final supply chain strategy

Gain commitment to implementation:

- Presentation of final strategy to stakeholders
- Stakeholder ratification of supply chain strategy



Establish and Manage Strategic Relationships within Procurement

Level: Level 6

Credit Value: 8
GLH: 40

Unit Number: L/506/6151

This unit will help learners to understand the components of strategic

procurement and strategic relationship management and be able to

Unit Aim:procurement and strategic relationship manage establish and manage strategic relationships.

This unit has 5 learning outcomes.

LEARNING OUTCOMES		ASSESSMENT CRITERIA		
The learner will:		The learner can:		
1	Understand the concept of strategic procurement relationship management.	1.1 Explain the theory of strategic procurement and category management.1.2 Explain the tools and techniques used in strategic procurement relationship management.		
2	Be able to determine when strategic relationships are appropriate in procurement.	2.1 Evaluate the different categories of spend in procurement.2.2 Determine categories of spend requiring a strategic relationship.		
3	Be able to develop a procurement strategy for strategic categories of spend.	3.1 Evaluate the various types of strategic procurement relationship including the risks and benefits.3.2 Produce a procurement strategy and implementation plan.3.3 Agree strategy with stakeholders.		



LE	EARNING OUTCOMES	ASSESSMENT CRITERIA
Th	ne learner will:	The learner can:
4	Be able to establish strategic procurement relationships.	 4.1 Identify the relationship type that best matches the organisation's procurement requirements. 4.2 Solicit and evaluate bids for strategic purchases in accordance with the relationship type identified and in accordance with organisational requirements. 4.3 Determine strategic relationship with suppliers that will improve the performance of the supply chain. 4.4 Recommend the agreed supplier and communicate strategic relationship type to stakeholders. 4.5 Award contracts for strategic purchases in accordance with organisational procedures.
5	Be able to manage strategic procurement relationships.	 5.1 Measure the effectiveness of a strategic relationship using appropriate tools and techniques. 5.2 Review the outcomes of the relationship with key stakeholders according to agreed timescales. 5.3 Establish and implement performance improvement plans as required.



Indicative Content: Establish and Manage Strategic Relationships within Procurement

Learning Outcome 1:

Strategic procurement and category management:

- Relationship between strategic procurement and category management
- Strategic procurement process
- Foundations for strategic supplier relationships
- · Benefits of strategic procurement

Tools and techniques in strategic relationship management:

- Supplier relationship management (SRM)
- Performance measurement and benchmarking
- Risk reduction and cost reduction techniques
- Collaborative relationships and supplier innovation

Learning Outcome 2:

Categorise procurement expenditure:

 Procurement portfolio analysis based upon annual expenditure and market exposure (risk)

Identify areas requiring a strategic relationship:

- List of critical (high spend/high risk) categories
- Ranked list of critical categories

Learning Outcome 3:

Option appraisal:

- Procurement relationship continuum
- Option appraisal to determine optimum relationship type taking into account risks and benefits

Procurement strategy:

Procurement strategy and implementation plan with key milestones

Agree strategy:

- Presentation of strategy to stakeholders
- Stakeholder dialogue



Indicative Content: Establish and Manage Strategic Relationships within Procurement

• Agreed and final strategy

Learning Outcome 4:

Identify relationship type:

Final procurement strategy

Solicit bids:

- Supplier dialogue
- Supplier negotiation
- Invitation to bid documents
- Bid analysis
- Bid clarification and negotiation

Identify preferred bid(s):

- Final bid analysis
- Preferred sourcing option

Recommendation and stakeholder ratification:

- Contract award business case
- Presentation of preferred option to stakeholders
- Stakeholder dialogue
- Stake holder ratification

Award contract:

- Supplier award letter
- Contract documentation
- Supplier briefing and start-up meeting
- Organisational procedures

Learning Outcome 5:

Measure relationship outcomes:

- Service level agreement
- Performance measurement data to include task and relationship performance

Review outcomes with stakeholders:



Indicative Content: Establish and Manage Strategic Relationships within Procurement

- Benchmark reports
- Balanced scorecards and dashboards
- Internal stakeholder review meetings
- Supplier review meetings

Performance improvement:

- Performance gap analysis
- · Review of gaps with internal stakeholders and suppliers
- Performance improvement options
- Agreed performance improvement plans



Implement a Supply Chain Strategy

Level: Level 6

Credit Value: 8
GLH: 40

Unit Number: J/506/6150

Unit Aim: This unit will help learners to implement a supply chain strategy from

resourcing through implementation to measuring outcomes.

This unit has 5 learning outcomes.

LE	ARNING OUTCOMES	ASSESSMENT CRITERIA
Th	ne learner will:	The learner can:
1	Understand how to implement a supply chain strategy.	1.1 Explain the framework for implementing a supply chain strategy.1.2 Evaluate the tools and techniques
	Do able to develop an implementation	required for effective implementation.
2	Be able to develop an implementation plan for a supply chain strategy.	2.1 Develop an implementation plan for a supply chain strategy including performance indicators and an analysis of resource requirements.
		2.2 Obtain support for the supply chain strategy implementation plan from stakeholders.
3	Be able to manage change when implementing a supply chain strategy.	3.1 Determine necessary changes with key drivers for change.
		3.2 Develop strategies to tackle barriers to change.
		3.3 Manage change including liaison with stakeholders.



LE	ARNING OUTCOMES	ASSESSMENT CRITERIA
Th	e learner will:	The learner can:
4	Be able to evaluate progress of implementation plan for a supply chain strategy.	4.1 Evaluate progress of plan against performance indicators.4.2 Communicate outcomes of evaluation to stakeholders.4.3 Amend the plan in the light of analysis of performance and stakeholder feedback.
5	Be able to review implementation of the strategy.	5.1 Analyse the outcomes of the implementation of strategy in collaboration with stakeholders.5.2 Evaluate lessons learnt for future strategy development.



Indicative Content: Implement a Supply Chain Strategy

Learning Outcome 1:

Framework for enabling strategy implementation:

- Infrastructure to include systems, logistics, organisational culture, management support, organisational design, finance and accounting
- Procurement process to include market analysis, procurement strategy, sourcing, negotiation, contracting, supplier relationship management
- Internal resources to include procurement capacity and competence levels, stakeholder support, cross functional team working, finance and budget
- External resources to include routine supplier, alliances and partnerships and supplier networks

Tools and techniques for strategy implementation:

- · Stakeholder mapping and management
- PADI (pragmatic, performance, administrative, divergent/development, integration) framework for collaboration
- Creation of collaboration relationships
- Change management techniques
- Measurement and reporting techniques
- Project management tools and techniques

Learning Outcome 2:

Implementation plan:

- Supply chain strategy
- List of resources required to implement the strategy including people, systems and budgets
- Resource gap analysis
- Identification of additional resources
- Key milestones and sequenced activity
- Gannt chart
- Strategy implementation plan

Obtain support from stakeholders for plan:

- Presentation of strategy implementation plan to stakeholders
- Stakeholder dialogue
- Final strategy implementation plan

Learning Outcome 3:

Identify changes:

- Systems change
- Culture change



Indicative Content: Implement a Supply Chain Strategy

- Organisational design change
- Job roles change
- Inventory management change
- Logistics change
- Suppliers change
- Procurement process including negotiation change
- Contracting change
- Supplier relationship management change
- Performance measurement change

Strategies for overcoming barriers to change:

- Stakeholder list
- Stakeholder mapping
- Force field analysis
- SWOT analysis
- Presentations
- Workshops
- Early stakeholder involvement plans
- Negotiation plans including tradable variables

Manage change:

- Change models
- Culture change
- Stakeholder management
- Conflict resolution

Learning Outcome 4:

Progression plan against performance indicators:

- The strategy, milestones and KPI's
- Hierarchy of objectives
- Operational plans and category plans
- Individual objectives and appraisals
- Cross functional team working effectiveness
- Upstream procurement activities against targets
- Market and supplier research
- Performance review reports and dashboards
- Project reviews
- Individual reviews
- Surveys
- Balanced scorecards

Communicate results to stakeholders:



Indicative Content: Implement a Supply Chain Strategy

- Presentation of performance reports and dashboards to stakeholders
- Dialogue with stakeholders

Amend plan as required:

- Amendments to plan
- Rationalisation of revised plan
- Circulation of revised plan to stakeholders

Learning Outcome 5:

Measure the outcomes:

- Targets (quantitative and qualitative)
- Actual v target measures
- Cost reduction, risk reduction, lead time reduction and supplier innovation measures
- Procurement process improvement measures
- Surveys re customer satisfaction
- Reports, balanced scorecards, dashboards
- Dialogue with stakeholders

Review lessons learnt:

- Improvement successes cause and effect
- Areas of failure cause and effect
- Review of internal infrastructure and process enabling foundation
- Review of supply chain strategy components
- Summary of what to do differently next time



Provide Leadership and Direction for an Organisation

Level: Level 6

Credit Value: 7
GLH: 35

Unit Number: Y/506/6153

This unit will help learners to lead their organisation to the

Unit Aim: achievement of objectives overcoming conflict and creating a culture

of continuous improvement.

This unit has 5 learning outcomes.

LE	ARNING OUTCOMES	ASSESSMENT CRITERIA
Th	e learner will:	The learner can:
1	Understand the theory of organisational leadership.	1.1 Explain the difference between management and leadership.
		 1.2 Explain the theory of different leadership styles and when they are applicable.
2	Be able to communicate an organisation's vision and strategy to stakeholders.	2.1 Promote an organisation's vision and strategy to key stakeholders and explain their efficacy.
3	Be able to develop a culture of continuous improvement.	3.1 Encourage creativity and innovation within an organisation.3.2 Motivate people to embrace continuous improvement.
		3.3 Use appropriate strategies and techniques to empower others to lead continuous improvement initiatives.



LEA	ARNING OUTCOMES	ASSESSMENT CRITERIA
The	e learner will:	The learner can:
	Be able to lead an organisation through change and overcome conflict.	 4.1 Determine changes to be implemented and consult with key stakeholders about proposed changes. 4.2 Analyse the impact of proposed change and any drivers and barriers to the change process. 4.3 Lead the change process with regular feedback to key stakeholders. 4.4 Resolve conflict arising from implementation of change.
	Be able to review own leadership performance.	5.1 Obtain feedback on own leadership performance.5.2 Produce plan to develop own leadership skills.



Indicative Content: Provide Leadership and Direction for an Organisation

Learning Outcome 1:

Management v leadership:

- Management definitions
- Leadership definitions
- Comparison of leadership and management
- · Traits and role of leader

Leadership styles:

- Leadership continuum
- Situational leadership
- Blake and Mouton grid
- McGregor theory x and theory y
- Contingency models
- Traditional and transformational leadership

Learning Outcome 2:

Communicate vision and strategy:

- Strategy document
- Presentations of vision and strategy
- Stakeholder communication
- Stakeholder dialogue

Learning Outcome 3:

Encourage innovation:

- · Brainstorming meeting
- Innovation recognition
- Transformational leadership examples
- "What if" scenario analysis

Motivation:

 Application of content, process and contingency theories of motivation linked to continuous improvement

Empowerment:

- Delegation of work packages
- Management by objectives examples



Indicative Content: Provide Leadership and Direction for an Organisation

Introduction of "can do" culture

Total Quality Management (TQM) teamwork.

Learning Outcome 4:

Identify areas for change:

- Performance gap analysis
- Change options
- Stakeholder dialogue

Impact of change:

- Impact of change
- Stakeholder analysis
- Force field analysis

Manage change:

- Plan for change
- Change milestones
- Implementing change
- Measuring change progress
- Stakeholder mapping
- Stakeholder reporting
- Stakeholder dialogue

Resolve conflict:

- Identification of conflict
- Arbitration and negotiation meetings
- Conflict resolution outcomes

Learning Outcome 5:

Feedback on own leadership:

- Line manager feedback on task and relationship leadership performance
- Peer feedback on leadership performance

Leadership skills development:

- Leadership competence gap analysis
- Areas for leadership development
- Training and development plans for leadership skill development



Develop and Implement a Corporate Social Responsibility Process for the Supply Chain

Level: Level 6

Credit Value: 6
GLH: 35

Unit Number: M/506/6157

This unit will help learners to understand corporate social

Unit Aim: responsibility in supply chains and how to implement corporate social

responsibility within own supply chain that reflects organisational

requirements.

This unit has 4 learning outcomes.

LE	EARNING OUTCOMES	ASSESSMENT CRITERIA
Th	ne learner will:	The learner can:
1	Understand the concept of corporate social responsibility (CSR) in the supply chain.	1.1 Explain the importance of supply chain CSR and its impact on organisational CSR.1.2 Explain the key areas that should be included in a supply chain CSR policy.
2	Be able to develop a supply chain CSR policy.	 2.1 Review an organisation's CSR policy identifying areas that impact the supply chain. 2.2 Review best practice supply chain CSR policy to inform development of an organisation's CSR policy. 2.3 Produce a supply chain CSR policy that supports internal and external organisational objectives.
3	Be able to implement a supply chain CSR policy.	3.1 Determine methods for agreement and engagement with all stakeholders.3.2 Devise an implementation plan for the CSR supply chain policy.3.3 Communicate supply chain CSR policy to all stakeholders.



LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
4 Be able to evaluate impact of the supply chain CSR policy.	4.1 Use internal and external reporting measurements to evaluate the impact of the supply chain CSR policy.4.2 Evaluate ways to refresh and reinforce the supply chain CSR policy.



Indicative Content: Develop and Implement a Corporate Social Responsibility Process for the Supply Chain

Learning Outcome 1:

Importance of supply chain CSR and its impact on organisational CSR:

- Definition of CSR
- Importance of supply chain CSR in managing risk and exposure to 3rd parties
- How supply chain CSR impacts on organisational CSR

Key areas of a supply chain CSR policy:

- Legal compliance
- Employment conditions and pay
- Health and safety
- Environmental
- Ethical
- Fair trade
- Application of standards

Learning Outcome 2:

Review organisations CSR:

- Organisations CSR
- List of areas impacting on the supply chain

Best practice supply chain CSR:

- Supply chain CSR research
- Institutes and industry supply chain CSR policies

Produce CSR supply chain policy:

- Comparison of organisational requirements against best practice
- List of areas to be covered in supply chain CSR policy
- Draft supply chain CSR policy

Learning Outcome 3:

Agree with stakeholders:

- Presentation of draft supply chain CSR policy to stakeholders
- Stakeholder dialogue
- Final supply chain CSR policy



Indicative Content: Develop and Implement a Corporate Social Responsibility Process for the Supply Chain

Implementation plan:

- Prioritisation of CSR implementation areas
- Supply chain CSR plan with detailed actions and timescales
- Implementation of plan

Communicate policy to stakeholders:

• Communication of supply chain CSR plan to all stakeholders

Learning Outcome 4:

Evaluate impact of supply chain CSR policy:

- CSR implementation performance measurement data
- Supplier feedback on CSR implementation
- 3rd party supply chain CSR audit reports and/or benchmarking
- CSR impact report
- Communication of CSR supply chain impact report to stakeholders

Refreshing and reinforcing the supply chain CSR policy:

- Amended supply chain CSR policy and implementation plan
- Supplier CSR review meetings
- Supplier CSR targets



Develop and Implement Model Forms of Contract for Procurement

Level: Level 6

Credit Value: 6
GLH: 40

Unit Number: R/506/6197

This unit will help learners to mitigate risk and exposure to suppliers

Unit Aim: through the development of model forms of contract for an

organisation.

This unit has 5 learning outcomes.

LE	EARNING OUTCOMES	ASSESSMENT CRITERIA
Th	ne learner will:	The learner can:
1	Understand the concepts of express and implied contractual terms and their impact on procurement contracts.	1.1 Explain the concepts of express and implied contractual terms and their sources. 1.2 Evaluate how these concepts impact on contracts in procurement.
2	Be able to identify opportunities to introduce model forms of contract within an organisation.	2.1 Explain the advantages of model forms of contract to an organisation. 2.2 Analyse categories of procurement and agree those that would benefit from the introduction of model forms of contract.
3	Be able to identify areas for improvement in model forms of contract within procurement in an organisation.	3.1 Evaluate existing model forms of contract in procurement and identify areas for improvement.
4	Be able to develop model forms of contract for procurement in an organisation.	 4.1 Develop draft model forms of contract for different categories of spend in procurement. 4.2 Consult with stakeholders about model forms of contract. 4.3 Finalise model forms of contract in line with feedback from stakeholders.



LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
5 Be able to implement model forms of contract.	5.1 Implement model forms of contract in relevant procurement categories.



Indicative Content: Develop and Implement Model Forms of Contract for Procurement

Learning Outcome 1:

Express and implied terms:

- Definition of express and implied terms of contract
- Sources of express and implied terms
- Implied terms of the Sale of Goods Act

Impact on procurement contracts:

- Express terms and contract formation including the "battle of the forms"
- How the buyer can mitigate risk through express contract terms
- Unfair Contract Terms Act and the exclusion of implied terms
- Main express terms in a procurement contract

Learning Outcome 2:

Advantages of model forms of contract:

- Advantages of model forms for the buying organisation
- Advantages of model forms for the market

Identify categories of procurement requiring "model forms":

- Procurement portfolio analysis by category
- Review of current forms of contract for each category

Identification of categories requiring model forms of contract and their ranking based upon highest risk.

Learning Outcome 3:

Evaluate existing model forms:

- Industry model forms of contract
- CIPS model forms of contract
- Organisational model forms of contract
- Evaluation of viability for own organisation identifying areas for improvement.

Learning Outcome 4:

Develop draft model forms of contract:

- Existing terms to be used in model forms
- New terms to be included in model forms
- Draft model forms of contract



Indicative Content: Develop and Implement Model Forms of Contract for Procurement

Consult stakeholders:

- Presentation of model forms of contract to stakeholders
- Stakeholder dialogue identifying areas for potential change

Finalise model forms of contract:

- Revisions to model forms of contract
- Final model forms of contract

Learning Outcome 5:

Implement model forms of contract:

- Policy and procedure on using model forms of contract throughout the organisation
- Communication of model forms of contract to stakeholders
- Sourcing activity using model forms of contract



Develop Sustainability in the Supply Chain

Level: Level 5

Credit Value: 6
GLH: 35

Unit Number: K/506/5279

This unit will help learners to understand sustainability in supply

Unit Aim: chains and how to develop and implement sustainability within own

supply chain that reflects organisational requirements.

This unit has 4 learning outcomes.

LE	ARNING OUTCOMES	ASSESSMENT CRITERIA
Th	e learner will:	The learner can:
1	Understand sustainability in the supply chain.	1.1 Explain the key initiatives and standards to improve supply chain sustainability.1.2 Explain how key areas of sustainability impact on supply chains.
	De able to any due a complete balance	
2	Be able to produce a supply chain sustainability plan.	2.1 Review an organisation's corporate social responsibility plan.2.2 Analyse key factors affecting supply chain sustainability.
		2.3 Produce a supply chain sustainability plan in consultation with stakeholders.
3	Be able to implement a supply chain sustainability plan.	3.1 Agree implementation plan with stakeholders.
		3.2 Implement plan against key performance indicators.



LE	EARNING OUTCOMES	ASSESSMENT CRITERIA
Tr	e learner will:	The learner can:
4	Be able to review the performance of the supply chain sustainability plan.	4.1 Monitor results against key performance indicators. 4.2 Summarise findings and present to stakeholders. 4.3 Pavisa plan in line with feedback from
		4.3 Revise plan in line with feedback from stakeholders.



Indicative Content: Develop Sustainability in the Supply Chain

Learning Outcome 1:

Initiatives and standards in supply chain:

- Labour standards and the International Labour Organisation (ILO)
- Labour codes of conduct
- Environmental standards such as ISO 14001
- Fair trade organisations and fair trade standards
- Responsible procurement initiatives including ethical procurement
- Health and safety standards

Impact on supply chains:

- Impact on supply chain markets
- Impact on suppliers
- Impact on the supply chain and logistics
- Impact on achieving lowest acquisition cost

Learning Outcome 2:

Organisations corporate social responsibility:

- Organisations corporate social responsibility plan
- Identify factors affecting supply chain management

Analyse key factors affecting supply chain sustainability:

- Environmental factors
- Workforce factors
- Health and safety factors
- Ethical factors
- Fair trade factors



Indicative Content: Develop Sustainability in the Supply Chain

Produce a supply chain sustainability plan:

- Supply chain sustainability policy
- Dialogue with stakeholders
- Supply chain sustainability plan to include; sustainability in supply market analysis, sustainability in developing requirements, sustainability in sourcing and contracting, sustainability in logistics, sustainability in supply relationship management and supplier development.

Learning Outcome 3:

Agree implementation plan:

- Stakeholder dialogue to agree implementation plan
- Sustainability implementation plan with key performance indicators

Implement supply chain sustainability plan:

- Revised procurement documentation to include sustainability factors
- Procurement team briefing meeting
- Supplier dialogue communicating plan
- Actions to demonstrate implementation plan
- Measurement of implementation progress

Learning Outcome 4:

Monitor results:

- Evaluation of implementation progress against key performance indicators
- Identification of areas not meeting targets and those exceeding targets

Present findings:

- Sustainability performance report
- Presentation of report to stakeholders
- Stakeholder dialogue to agree changes to plan

Revised plan:

- Revised supply chain sustainability plan
- Communication of revised plan to stakeholders



Manage a Global Sourcing Process

Level: Level 6

Credit Value: 7
GLH: 35

Unit Number: T/506/6158

This unit will help learners to undertake a global market procurement

Unit Aim: exercise incorporating market analysis, contract development,

sourcing, contracting, contract management and performance

reviews.

This unit has 5 learning outcomes.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
Understand the differences between global and local sourcing.	1.1 Evaluate the key factors that determine whether a local or global sourcing exercise should be carried out.1.2 Explain the models and tools that can be used in the global sourcing process.
Be able to identify and evaluate global sourcing opportunities.	2.1 Evaluate the supply market to determine global sourcing opportunities.2.2 Produce a market analysis report and agree global sourcing opportunities with stakeholders.2.3 Produce a global sourcing plan for an organisation.
3 Be able to manage a sourcing process in a global market.	 3.1 Determine requirements for supplies or services to be sourced globally. 3.2 Manage the bid process including the production of documentation, invitation and receipt of bids. 3.3 Evaluate and clarify bids with stakeholders. 3.4 Award business to preferred supplier.



LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
4 Be able to manage global contracts.	 4.1 Develop effective working relationships with contracted suppliers. 4.2 Evaluate the supplier's performance against the measures included in the contract. 4.3 Resolve any issues arising from the evaluation. 4.4 Manage payment schedule in accordance with contract terms.
5 Be able to review the outcome of a global sourcing process.	5.1 Evaluate the lessons learnt from the global sourcing process.5.2 Revise global sourcing process as required taking on board findings of evaluation.



Indicative Content: Manage a Global Sourcing Process

Learning Outcome 1:

Factors global v local sourcing:

- Cost factors/quality factors
- Supply chain risks
- Lead times
- Delivery schedule and flexibility
- Supply market risks
- Currency and exchange rates
- Terms and applicable law
- · Relationship factors such as language and time zones

Models and tools for global sourcing:

- Macro market analysis
- Micro market analysis
- Risk/opportunity matrix
- Letters of credit
- Supply chain vulnerability
- INCO terms
- Applicable law
- Role of freight forwarding agent

Learning Outcome 2:

Supply market research:

- STEEPLE analysis
- Industry '5' force analysis
- Risk/opportunity analysis
- Supply chain analysis
- Supplier analysis
- Cost analysis
- SWOT analysis

Market analysis report:

- Market analysis report with global sourcing recommendations
- Presentation and dialogue with stakeholders

Global sourcing plan:

Global sourcing procurement strategy and plan

Learning Outcome 3:

Determine requirements:

Stakeholder dialogue



Indicative Content: Manage a Global Sourcing Process

Statement of requirements and specification

Bid process:

- Invitation to bid documentation
- Completed bids

Evaluate bids:

- Bid analysis spreadsheets
- Supplier clarification communication
- Supplier negotiations
- Stakeholder dialogue including award agreement

Award business:

- Award letter
- Purchase order
- Contract documentation

Learning Outcome 4:

Develop working relationships:

- Supplier communication and dialogue
- Supplier review data

Evaluate suppliers' performance:

- · Vendor rating data
- Areas of poor performance

Resolve issues:

- Supplier dialogue
- Performance issue resolution

Manage payment:

- Contract terms for payment
- Communication with finance department

Lessons learnt:

Review of global sourcing identifying things that worked well and areas requiring improvement

Revised process:

Revised global procurement policy and process



Manage a Programme of Complementary Projects

Level: Level 6

Credit Value: 8
GLH: 30

Unit Number: D/506/6154

This unit will help learners to understand and apply the tools and

Unit Aim: techniques for planning and managing a group of inter-related

projects.

This unit has 5 learning outcomes.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
Understand principles, processes, tools and techniques of programme management.	1.1 Explain the roles and responsibilities of a programme manager.
	1.2 Explain how to apply principles, processes, tools and techniques to programme management.
2 Be able to develop a programme plan.	2.1 Consult with stakeholders and programme sponsor(s) to develop and agree a plan.
	2.2 Identify and evaluate potential risks and contingencies.
	2.3 Establish criteria for evaluating the programme on completion.



LE	EARNING OUTCOMES	ASSESSMENT CRITERIA
Tł	ne learner will:	The learner can:
3	Be able to communicate programme aims and plans to project managers.	 3.1 Communicate programme aims and links to an organisation's strategic targets. 3.2 Explain how individual projects link to the programme and to each other. 3.3 Communicate plans, roles and responsibilities to programme team members.
4	Be able to monitor project and programme progress.	 4.1 Collect and analyse feedback on progress on individual projects. 4.2 Review progress against the plan and wider developments affecting the programme. 4.3 Communicate progress to the programme sponsor(s) and key stakeholders. 4.4 Confirm completion of programme with programme sponsor(s) and stakeholders.
5	Be able to evaluate a programme.	5.1 Evaluate the programme using agreed criteria.5.2 Identify lessons learned for future programmes.5.3 Evaluate the contributions of programme team members.



Indicative Content: Manage a Programme of Complementary Projects

Learning Outcome 1:

Roles and responsibilities:

- Compliance with corporate governance
- Objective setting
- Stakeholder management
- Planning
- Resource management
- Risk management
- Contract management
- Control
- · Performance reporting

Application of process tools and techniques:

- Investment appraisal
- Risk registers
- Planning tools such as networking techniques and Gantt charts
- Types of contracts and contract management tools and techniques
- Budget and variance analysis
- Stakeholder and mapping and force field analysis
- Organisational design including matrix management
- Benchmarking and dashboards
- Team management and motivation

Learning Outcome 2:

Consult and agree plan:

- stakeholder dialogue
- programme terms of reference
- outline programme plan and hierarchy of projects

Risk and contingencies:

- Areas of potential risk re time, cost and quality
- Risk probability and impact analysis
- "What if" scenarios and contingency plans

Programme evaluation criteria:

- Completion time, cost and quality evaluation criteria
- Completion programme process evaluation criteria



Indicative Content: Manage a Programme of Complementary Projects

Learning Outcome 3:

Links to strategic targets:

- Hierarchy of objectives from strategic goals to programmes
- Project manager dialogue

Project links to programme:

- Hierarchy of objectives from programme goals to projects
- Project manager dialogue

Roles and responsibilities:

- Individual project terms of reference
- Individual project plans
- Project manager dialogue

Learning Outcome 4:

Project progress:

- Project management reports
- Analysis of project management reports against overall programme targets

Review overall programme progress::

- Programme progress analysis
- Programme progress reports

Reporting progress:

- Programme progress reports communication to sponsors and key stakeholders
- Sponsor and key stakeholder dialogue

Confirm completion:

- Programme completion report
- Communication of programme completion report to sponsor and stakeholders

Learning Outcome 5:



Indicative Content: Manage a Programme of Complementary Projects

Evaluate the programme:

- Programme outcomes measured against evaluation criteria
- Programme evaluation report
- Circulation of programme evaluation report to sponsors and key stakeholders

Lessons learnt:

 Lesson learnt document identifying things that worked well and things that should be changed for future programmes

Team member contributions:

- Evaluation of team members with regard to task and relationship management
- Feedback to team member



Measure and Benchmark the Performance of Procurement

Level: Level 6

Credit Value: 6
GLH: 30

Unit Number: A/506/6162

This unit will help learners to understand the key areas of

Unit Aim: procurement performance measurement and introduce a

benchmarking model to measure the performance of procurement.

This unit has 4 learning outcomes.

LE	ARNING OUTCOMES	ASSESSMENT CRITERIA
Th	e learner will:	The learner can:
1	Understand measurement and benchmarking in procurement.	 1.1 Explain the key areas of the procurement activity that can be measured. 1.2 Explain the key performance indicators related to procurement. 1.3 Evaluate different benchmarking techniques in procurement.
2	Be able to develop a measurement and benchmarking system.	 2.1 Analyse current measurement and benchmarking systems to identify good practice and determine areas for development. 2.2 Produce a measurement and benchmarking system in consultation with stakeholders.
3	Be able to implement measurement and benchmarking in procurement.	3.1 Implement a measurement and benchmarking system in procurement.



LEARNING OUTCOMES The learner will:	ASSESSMENT CRITERIA The learner can:
Be able to review the results of measurement and benchmarking activity.	4.1 Analyse results of measurement and benchmarking and disseminate findings to stakeholders.4.2 Agree areas for further development with stakeholders.



Indicative Content: Measure and Benchmark the Performance of Procurement

Learning Outcome 1:

Areas of procurement measurement:

- Procurement infrastructure
- Procurement processes
- Procurement staff competencies
- Cost reduction
- Risk reduction
- Supplier performance
- Supplier innovation
- Supply chain CSR improvements
- Customer service
- Supplier relationships

Key performance indicators:

- · Continuity of supply against service level
- Cost reduction against target
- Risk reduction achievements
- Supplier innovations
- % of time on value add activities
- % of total expenditure controlled by procurement
- Process improvements

Different benchmarking techniques:

- Infrastructure and process benchmarking
- Outcome benchmarking
- Balanced scorecard approach
- Dashboard approach
- Qualitative v quantitative benchmarking

Learning Outcome 2:

Current system analysis:

- Current measurement system review against transactional and strategic measurement
- Identification of good practice and areas for improvement
- · Report findings to stakeholders

New measurement and benchmarking system:

- Proposed new benchmarking system
- Stakeholder dialogue regarding what to measure and how to report findings



Indicative Content: Measure and Benchmark the Performance of Procurement

 Final benchmarking system addressing procurement enablers, procurement process, supply base management, cost and risk reductions and supplier performance

Learning Outcome 3:

Implement system:

- Communication of benchmarking system to stakeholders
- Training of staff involved in benchmarking scoring
- Supplier dialogue and briefing
- Performance data collection

Learning Outcome 4:

Analyse results and disseminate findings:

- Performance data analysis
- Benchmarking reports
- · Presentation of reports to stakeholders

Agree further development with stakeholders:

- Stakeholder dialogue
- Identification of areas for further development with stakeholders



Outsource Organisational Processes

Level: Level 3

Credit Value: 8
GLH: 40

Unit Number: A/506/6159

This unit will ensure that learners are able to identify potential

Unit Aim: processes that can be outsourced, assess the impact of doing so and

identify vendors to outsource processes to and undertake and monitor

the outsourcing.

This unit has 5 learning outcomes.

LE	EARNING OUTCOMES	ASSESSMENT CRITERIA
Tł	ne learner will:	The learner can:
1	Be able to identify non-core processes within an organisation.	1.1 Analyse an organisation's activities and identify processes that can be outsourced.
2	Be able to evaluate the implications of outsourcing non-core processes.	2.1 Evaluate and assess risks for outsourcing identified non-core processes.
		2.2 Develop a business case for outsourcing non-core processes.
3	Be able to select a vendor to outsource non-core processes to.	3.1 Draw up specifications and communicate to potential vendors.
		3.2 Agree criteria for evaluating potential vendors.
		3.3 Appraise potential vendors against criteria.
		3.4 Select the vendor that best meets the criteria.



LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
4 Be able to outsource non-core processes.	 4.1 Develop a contract that meets legal and commercial requirements with the selected vendor. 4.2 Negotiate contract clauses to meet the interests of the organisation. 4.3 Produce plans to transfer agreed processes to the contracted vendor. 4.4 Communicate the outsourcing plans to stakeholders. 4.5 Transfer the agreed processes to contracted vendor.
5 Be able to monitor and review the outsourcing of non-core processes.	 5.1 Monitor and review the vendor's performance at agreed times, in line with agreed contract. 5.2 Agree changes to improve performance, in line with contractual agreements. 5.3 Present findings on the effectiveness of outsourcing non-core processes to key stakeholders.



Indicative Content: Outsource Organisational Processes

Learning Outcome 1:

Identify areas for potential outsourcing:

- Divide organisational processes into core and non-core
- Group non-core processes into categories of activity such as facilities management

Learning Outcome 2:

Identify risks and opportunities for outsourcing:

- Identification of market providers for each potential outsourced category
- Evaluation of risks and opportunities for outsourcing each category
- Categories where outsourcing could reduce cost, reduce risk or add value

Business case for outsourcing:

- Outsourcing business case outlining the costs, timescales and potential benefits of outsourcing
- Ratification of business case by key stakeholders

Learning Outcome 3:

Solicit bids:

- Operational requirements
- Service level measures
- Terms and conditions of contract
- Supplier shortlist
- Invitation to bid to vendors
- Stakeholder dialogue

Agree evaluation criteria:

- Stakeholder dialogue
- List of evaluation criteria with weightings
- Communication of evaluation criteria to vendors

Bid evaluation:

- Initial bid evaluation spreadsheet
- Vendor presentations and bid clarification meetings
- Revised bid evaluation spreadsheet



Indicative Content: Outsource Organisational Processes

Select vendor:

- Bid selection recommendation paper
- Presentation of paper to stakeholders
- Stakeholder dialogue and ward ratification

Learning Outcome 4:

Develop contract:

- Contract documentation
- Dispatch of contract documentation to vendor

Negotiate clauses:

- Contract clause negotiation with vendor
- Final signed contract documentation

Agree outsourcing process with vendor:

· Finalisation of transfer plans and timescales with vendor

Communicate to stakeholder:

Communicate agreed transfer plans to stakeholders

Transfer processes to vendor:

- Staff briefings
- Personnel and finance department actions
- Vendor handover meetings
- Vendor start-up meetings

Learning Outcome 5:

Performance review:

- Performance review data
- Comparison of performance against service level agreement
- Identification of areas for performance improvement

Agree performance improvement changes:



Indicative Content: Outsource Organisational Processes

- Vendor contract review meetings
- Vendor dialogue
- Performance improvement plans
- Agreed claim for damages where supplier has breached contract performance terms

Present findings on effectiveness to stakeholders:

- Performance review reports
- Performance review scorecards and dashboards
- Stakeholder presentations
- Stakeholder dialogue



Strategic Contracting in Procurement

Level: Level 6

Credit Value: 7
GLH: 35

Unit Number: K/506/6156

Unit Aim:

This unit will help learners to undertake analysis, development and

establishment of strategic contracts in procurement.

This unit has 3 learning outcomes.

LEARNING OUTCOMES		ASSESSMENT CRITERIA
Th	ne learner will:	The learner can:
1	Understand strategic contracting in procurement.	1.1 Explain best practice in strategic contracting in procurement. 1.2 Evaluate the key tools and techniques used in establishing strategic contracts.
2	Be able to identify opportunities for establishing new strategic contracts in procurement.	2.1 Analyse procurement portfolio to determine high risk or high expenditure items that require a strategic contract. 2.2 Present proposals for new strategic contracts to stakeholders.
3	Be able to establish and award strategic contracts in procurement.	 3.1 Define the scope of strategic contracts with stakeholders. 3.2 Draft strategic contracts. 3.3 Engage with suppliers and solicit bids for strategic contracts. 3.4 Evaluate and clarify bids with stakeholders. 3.5 Agree preferred suppliers in consultation with stakeholders and award contracts.



Indicative Content: Strategic Contracting in Procurement

Learning Outcome 1:

Best practice in strategic contracting:

- Effective supply chain diligence practices to identify potential suppliers
- Requirements for partnership sourcing
- Shared risks/shared rewards contracts
- · Best practice models and EU procurement regulations

Tools and techniques to establish strategic contracts:

- Supplier dialogue
- Supplier negotiation
- · Restricted tendering
- · Weighted evaluation criteria
- Total cost of ownership (TCOO)
- Bid clarification and post tender negotiation

Learning Outcome 2:

Procurement portfolio analysis:

- Procurement portfolio analysis by category
- Identification of categories requiring a strategic contract
- · Prioritisation of contract programme

Present proposals to stakeholders:

- Strategic contract formation programme
- Presentation of programme to stakeholders
- Stakeholder dialogue

Agreed strategic contracts programme.

Learning Outcome 3:

Define scope of contract:

- Stakeholder dialogue
- Operational requirement
- Specification
- Contract duration
- Contract selection evaluation criteria



Indicative Content: Strategic Contracting in Procurement

Draft contracts:

- Terms and conditions
- Form of contract
- Operational requirement
- Pricing schedule
- Alternative bids
- Invitation to tender letter

Solicit bids:

- Supplier dialogue
- Invitation to tender (ITT)
- Returned bids
- Supplier negotiation
- Supplier presentations



Undertake Negotiations for Strategic Requirements

Level: Level 6

Credit Value: 6
GLH: 30

Unit Number: D/506/6199

This unit will help learners to plan and conduct negotiations for

Unit Aim: complex strategic procurements including planning and leading

negotiation meetings and implementing agreements.

This unit has 4 learning outcomes.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
Understand the theory of advarage negotiations.	1.1 Explain the principles of integrative negotiations. 1.2 Explain the determinants of strategic requirements. 1.3 Explain the traits of advanced negotiators.
2 Be able to plan for a strategic n	egotiation. 2.1 Determine the need for strategic negotiations. 2.2 Undertake research into the background of other parties involved in the negotiation and their possible negotiating positions. 2.3 Produce negotiation strategy and plans. 2.4 Identify the negotiation team.
3 Be able to lead strategic negotion	ations. 3.1 Brief team on their roles in the strategic negotiation. 3.2 Open negotiations with other parties. 3.3 Challenge other parties' positions and interests. 3.4 Use tactics and persuasion techniques to negotiate with other parties. 3.5 Reach agreement and summarise results.



LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
4 Be able to implement results of negotiations.	4.1 Communicate results of negotiation to all stakeholders.4.2 Work with supplier to implement agreed actions.4.3 Review and measure implementation of agreed actions.



Indicative Content: Undertake Negotiations for Strategic Requirements

Learning Outcome 1:

Principles of integrative negotiation:

- Win/win
- Collaborative
- Joint goals
- Long term relationship
- Trust and openness
- Commitment

Determinants of strategic requirements:

- High value/high risk
- Business critical
- Competitive advantage value add supplies
- Requires partnership relationship

Traits of advanced negotiators:

- Emotional intelligence
- Planning and strategy formation
- Behavioural traits including pull style negotiators
- Used of persuasion methods
- Concession patterns

Learning Outcome 2:

Need for negotiation:

- Trigger for negotiation
- Request for contract variation
- Procurement strategy

Research the other parties position and interest:

- Their team and roles
- Negotiation position
- Underlying interests
- Assumptions v facts
- Market testing and research
- Organisational culture and business outlook



Indicative Content: Undertake Negotiations for Strategic Requirements

Negotiation strategy:

- Variables
- Targets
- BATNA
- Concession plan
- Tactics
- Agenda
- Opening phase plan
- Testing phase plan
- Movement phase plan

2.1 Negotiation team:

- Commercial
- Technical
- Chair
- Summariser
- Observer

Learning Outcome 3:

Brief team:

- Team briefing
- Team role play
- Presentation of strategy

Open negotiations:

- Negotiation meeting notes
- Presentations

Challenge other party:

- Negotiation meeting notes
- Communication with other party

Negotiate agreement Negotiation

- Meeting notes
- Communication with other party



Indicative Content: Undertake Negotiations for Strategic Requirements

Reach agreement:

Summary of agreement and actions

Learning Outcome 4:

Communicate results:

· Communication of outcome to stakeholders

Implement outcome:

- Supplier implementation meetings
- Supplier review meetings
- Supplier communication

Review and measure implementation:

- Implementation performance measurement
- Review of implementation with supplier
- Communication of implementation progress and performance with stakeholders



Implement Lead Role Purchasing within an Organisation

Level: Level 6

Credit Value: 6 GLH: 40

Unit Number: D/506/6168

This unit will help learners to understand the different organisational **Unit Aim:**

models for lead role purchasing and be able to implement the concept

within own organisation.

This unit has 4 learning outcomes.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
Understand the theory of lead role purchasing.	1.1 Evaluate the different organisational choices for lead role purchasing.1.2 Explain the advantages of lead role purchasing.
Be able to undertake an organisational wide expenditure analysis identifying areas for lead role purchasing.	2.1 Undertake a Pareto and portfolio analysis.2.2 Identify high value and high risk intra business expenditure which would benefit from lead role purchasing.2.3 Prioritise areas for lead role purchasing.
Be able to appoint lead role purchasing champions.	3.1 Consult stakeholders and seek agreement for lead role purchasing.3.2 Manage the process of appointment of lead role purchasers.3.3 Brief lead role purchasers on their role.
Be able to implement lead role purchasing.	 4.1 Produce a lead role implementation plan and communicate to stakeholders. 4.2 Monitor lead role purchasing implementation against plan. 4.3 Review implementation with stakeholders and revise plan as necessary.





Indicative Content: Implement Lead Role Purchasing within an Organisation

Learning Outcome 1:

Organisational choices for lead role:

- CLAN
- SCAN
- Federal networks
- Category management

Advantages of lead role purchasing:

- · Procurement flexibility and lead role continuum
- Market expertise and category expertise
- · Potential aggregation of demand
- Organisational optimum procurement strategy

Learning Outcome 2:

Pareto and portfolio analysis:

- Pareto analysis by commodity expenditure
- Procurement portfolio analysis

Identify areas for lead role purchasing:

- Identify high value high risk devolved procurement
- Evaluation of benefits expected from lead role procurement by category of expenditure

Prioritise areas for lead role purchasing:

List of potential categories for lead role procurement

Learning Outcome 3:

Consult stakeholders:

- Presentation of lead role procurement proposal
- Stakeholder dialogue
- Ratification of lead role procurement proposal

Appoint lead role purchasers:

• Identification of lead role purchasers



Indicative Content: Implement Lead Role Purchasing within an Organisation

- Lead role job descriptions
- · Appointment of lead role purchasers

Brief lead role purchasers:

- Lead role tools and techniques manual
- Lead role training
- Lead role briefing

Learning Outcome 4:

Lead role implementation plan:

- Dialogue with lead role purchasers
- Lead role implementation plan including milestones and KPI's

Monitor implementation against plan:

- Measurement of lead role implementation
- Measurement of lead role procurement performance
- Lead role performance report

Review implementation with stakeholders:

- Presentation of lead role performance report to stakeholders
- Stakeholder dialogue
- Agreed revisions to lead role implementation
- Revised lead role implementation plan



Lead Innovation within an Organisation

Level: Level 6

Credit Value: 8
GLH: 32

Unit Number: R/506/6166

Unit Aim:

This unit helps learners to lead, develop and promote innovation

within an organisation.

This unit has 5 learning outcomes.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
Be able to analyse organisational approaches to innovation practice.	1.1 Evaluate different organisational approaches to innovation.1.2 Analyse approaches to innovation employed by an organisation.
Be able to design an innovation process for an organisation and demonstrate its implications for long-term success.	2.1 Design an innovation process for an organisation. 2.2 Communicate the implications of the innovation process for the long-term success of the organisation.
Be able to support others in the development and implementation of innovative ideas.	3.1 Support others in ensuring that innovative ideas are fed into the operational process.3.2 Assess how agreed ideas can be resourced.3.3 Support others in implementing agreed ideas.
4 Be able to review and improve the performance of the innovation process.	4.1 Evaluate feedback from all stakeholders to improve the innovation process.
5 Be able to provide recognition for successful implementation of innovative ideas.	5.1 Explain how to recognise innovative ideas that are successfully implemented.



Indicative Content: Lead Innovation within an Organisation

Learning Outcome 1:

Approaches to Innovation:

- Blue sky research
- Transformational innovation
- Incremental innovation
- Innovation processes

Approaches within an organisation:

- Current approach to innovation re product, service, processes, organisation and market
- Analysis of current approach to innovation

Learning Outcome 2:

Design an innovation process:

- Enabling foundation for innovation
- Structure for innovation terms
- Innovation process
- Innovation strategy
- Methods to measure success

Communicate the implications of the process:

- Value chain implications
- · Organisational design implications
- Culture implications
- Leadership and reward implications
- Team working and quality improvement team implications

Learning Outcome 3:

Support others in feeding innovation into operational process:

- Presentations of innovation concepts to stakeholders
- Communication and dialogue with stakeholders and innovation team

Assess how ideas can be resourced:

- Finance
- People
- Capacity
- Project management



Indicative Content: Lead Innovation within an Organisation

- Systems
- Production

Support other in implementing ideas:

- Innovation implementation meetings
- Project planning meetings
- Project management meetings
- Co-ordination of re-sourcing implementation
- · Cross functional team working

Learning Outcome 4:

- 4.1. Evaluate innovation performance and make improvements:
 - Innovation performance data
 - Stakeholder dialogue
 - Agreed revisions to innovation process
 - Revised innovation process

Learning Outcome 5:

How to recognise successful innovation:

- Team recognition
- Individual recognition
- Innovation reward scheme
- Organisational awards



Manage Finance for Procurement

Level: Level 6

Credit Value: 6
GLH: 35

Unit Number: Y/506/6198

This unit will help learners to understand financial and costing tools

Unit Aim:

and implement budgets and budget management along with the

application of financial and costing tools in the management of

procurement.

This unit has 5 learning outcomes.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
Understand the key principles of financial management.	1.1 Explain the role of financial management accounting within an organisation.1.2 Evaluate the different approaches an organisation can take to costing its products and services.
Be able to confirm financial responsibilities.	2.1 Confirm own financial responsibilities and limits of authority with stakeholders.2.2 Agree the rules and regulations for budget management with stakeholders.
Be able to apply financial techniques to procurement and supply activities.	3.1 Undertake a financial supplier appraisal. 3.2 Apply total cost of ownership techniques to the evaluation of a procurement.
Be able to manage the budget against targets.	 4.1 Review actual expenditure versus budget at regular intervals. 4.2 Identify and evaluate areas of underspend and overspend against budget targets. 4.3 Agree revision to budget with stakeholders.



LEARNING	OUTCOMES	ASSESSMENT CRITERIA
The learner	r will:	The learner can:
	to produce and agree a nental budget.	5.1 Consider department strategy and produce new draft budget in accordance with the strategy.5.2 Negotiate final master budget with stakeholders.



Indicative Content: Manage Finance for Procurement

Learning Outcome 1:

Role of accounting:

- Legal requirements
- Production of financial accounts
- Management planning and objective setting (budget)
- Performance measurement and review

Costing options:

- Standard costing
- Absorption costing
- Marginal costing
- Job costing
- Process costing
- Service costing

Learning Outcome 2:

Own responsibilities:

- Departmental budget responsibilities
- Procurement budget responsibilities

Budget management:

- Budget setting
- Budget reporting
- Budget variances
- Budget changes

Learning Outcome 3:

Supplier financial appraisal:

- Suppliers balance sheets
- Ratio analysis
- Findings from ratio analysis
- Third party financial appraisal

Apply total cost of ownership (TCOO) techniques:

- TCOO model
- Application of TCOO model



Indicative Content: Manage Finance for Procurement

Investment appraisal and DCF

Learning Outcome 4:

Review budget:

Budget reports showing actual v budget

Identify variances:

• Budget variance analysis

Budget revisions:

- Increased budget
- Decreased budget
- Transfer of budget between budget lines
- Stakeholder dialogue

Learning Outcome 5:

Produce budget:

- Department strategy and objectives
- Strategy review against current budget
- Changes required to budget
- Draft budget

Agree budget:

- Presentation of draft budget to stakeholders
- Budget discussion and negotiations with stakeholder
- Agreed final budget
- Circulation of final budget to stakeholders



Mobilising and Managing Teams

Level: Level 6

Credit Value: 12 GLH: 110

Unit Number: D/504/8043

Unit Aim:

This unit helps learners to understand organisational culture to ensure

the achievement of business objectives.

This unit has 3 learning outcomes.

LEARNING OUTCOMES	ASSESSMENT CRITERIA
The learner will:	The learner can:
1 Be able to mobilise a team	1.1 Reach consensus with team around objective(s), vision and goal(s)1.2 Establish team structure, organisation and processes for working together
	1.3 Assign appropriate roles and responsibilities to team members
2 Understand how to manage teams	2.1 Analyse techniques to manage and motivate team members
	2.2 Assess skills, personal objectives, working styles and preferences of team members
3 Be able to manage a team	 3.1 Apply appropriate motivational techniques 3.2 Evaluate the effectiveness of established team structure, organisation and processes for working together 3.3 Assess team performance
	3.4 Respond in an appropriate manner when required, to manage issues impacting individual or team performance



Indicative Content: Mobilising and Managing Teams

Learning Outcome 1:

Team objectives, vision and goals:

- Team presentations
- Team briefings
- Team buy-ins
- · Team objectives, vision and goals
- Creating a shared purpose

Team structure and processes:

- Team organagram
- Team working method statement
- Team processes

Assign roles and responsibilities:

- Individual team role statements
- 1 to 1 meetings

Learning Outcome 2:

Techniques to manage and motivate teams:

- Management by objectives
- Team building techniques
- Performance reviews
- Motivation theories (content, process and expectancy)
- Recognition and reward
- Types of leadership
- Team forming, storming, norming and performing

Skills, objectives and working styles of team members:

- Psychometric testing
- Competence framework gap analysis
- Assessment centres
- Training needs analysis
- appraisals

Learning Outcome 3:

Apply appropriate motivational techniques:

Different leadership styles



Indicative Content: Mobilising and Managing Teams

- Hygiene and motivational factors
- Team and team member recognition
- Team and team member rewards
- Team building and team rapport

Evaluate effectiveness:

- Belbin team role analysis
- Team working behavioural analysis
- Team processes evaluation
- Team role, structure and process changes

Assess team performance:

- Task performance measurement
- Team relationships performance measurement
- Team processes effectiveness
- Performance reports
- Performance balanced scorecards

Manage issues affecting individual or team performance:

- Individual performance issue resolution
- Conflict resolution
- Team performance issue resolution
- Performance improvement plans



Organisational Culture

Level: Level 6

Credit Value: 5
GLH: 30

Unit Number: L/506/6201

Unit Aim:

This unit helps learners to understand organisational culture to ensure

the achievement of business objectives.

This unit has 4 learning outcomes.

LE	ARNING OUTCOMES	ASSESSMENT CRITERIA
Th	e learner will:	The learner can:
1	Understand the concept of organisational culture.	1.1 Analyse how organisational culture can impact on organisational behaviour.1.2 Evaluate internal and external factors that can influence organisational cultures.
2	Understand the relationship between organisational culture, strategy and performance.	 2.1 Evaluate the relationship between organisational culture, strategy and performance. 2.2 Evaluate personal managerial behaviours that reinforce organisational values and cultures. 2.3 Critically compare different strategies for communicating organisational values to staff and motivating them to apply these in practice.
3	Be able to develop the culture of an organisation.	 3.1 Explain the kind of culture needed by an organisation in order to fulfil its objectives. 3.2 Agree values and behaviours that are required to achieve the desired organisational culture. 3.3 Develop a strategy to implement the agreed values and behaviours across the organisation.
4	Be able to monitor impact of agreed values and behaviours on business objectives.	4.1 Monitor the impact of having these values and behaviours on business objectives and propose change where necessary.



Indicative Content: Organisational Culture

Learning Outcome 1:

Culture impact on behaviour:

- Link between cultural web and organisational behaviour
- 4 types of culture linked to organisational behaviour

Factors that can impact on culture:

- Organisational history
- Type of industry
- Size of organisation
- Business strategy
- Location
- Management
- Market place
- Macro environment

Learning Outcome 2:

Relationship between culture strategy and performance:

- Culture as a determination of strategy
- Culture as a determination of performance

Managerial behaviours:

- Leadership styles
- Planning behaviours
- Control behaviours
- Routine behaviours
- Rituals
- Symbols

Compare strategies for communicating values:

- Recruitment strategies
- Social tools and training strategies
- Reward system strategies
- Motivation strategies

Learning Outcome 3:

Kind of culture needed:



Indicative Content: Organisational Culture

• Organisation culture analysis and review against objectives

Values and benchmarks required:

- Cultural web to achieve your organisational goals
- McKinsey's 7 'S' framework to achieve your organisational goals

Strategies to implement culture:

- Unfreezing current culture
- · Communication and buy in to new culture
- · Freezing the new culture

Learning Outcome 4:

Monitor impact:

- Objectives achievement gap analysis
- Cultural cause and effect analysis against objective achievement and nonachievement
- Changing cultural values
- Re-enforcing cultural values with stakeholders





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