Applied Business

OCR GCE H426 and H626 Unit F255 Training and development
Unit Recording Sheet

OCR RECOGNISING ACHIEVEMENT

Please read the instructions printed at the end of this form. **One** of these sheets, suitably completed, should be attached to the assessed work of **each** candidate

Unit Title	16 Training and development		Unit Code	F255	Session	Jan / June	Year	2	0	0	7
Centre Name						Centre Number					
Candidate Name						Candidate Number					

Evidence: You produce a training and development strategy for **two** functional areas of a medium- to large-sized business.

Criteria			Teacher Comment	Page No.
AO1.1: You identify the reasons for training staff, different types of training methods and initiatives that can impact on training and development plans; much of your evidence requires further clarification and elaboration; **[0 1 2 3]**	AO1.2: you demonstrate a sound understanding of the reasons for training staff, different types of training methods and initiatives, and the constraints that can impact on training and development plans; however, your evidence, at times, does not demonstrate sufficient depth; **[4 5 6]**	AO1.3: you demonstrate clear and comprehensive understanding of the reasons for training staff, different types of training methods and initiatives, and the constraints that can impact on training and development plans; your evidence displays both breadth and depth. **[7 8 9]**	A competent piece of work which demonstrates a clear & comprehensive understanding of topics covered. **Mark** 8	1 - 12.
AO2.1: Your training and development programmes are over-theoretical with only a basic attempt to apply them to your chosen business context; **[0 1 2 3 4 5]**	AO2.2: you apply your training and development programmes to your chosen business context; **[6 7 8 9 10]**	AO2.3: you target your training and development programmes to the specific needs of your chosen business context. **[11 12 13 14]**	Well done. You have produced & justified a relevant training programme for each department. You have responded well to the needs of the business. **Mark** 11	43 - 56.

Criteria			Teacher Comment	Page No.
AO3.1: Your analysis and interpretation of your research is limited in scope and does little to inform the development of your training and development strategy; your synthesis of gathered data is weak, with little evidence of integrated or strategic thinking; [0 1 2 3 4]	AO3.2: your analysis and interpretation of your research is sound, informing the development of your training and development strategy; your synthesis of gathered data is sound, with evidence of integrated and strategic thinking; [5 6 7 8]	AO3.3: your analysis and interpretation of your data is thorough and comprehensive, and there is an extensive focus on targeting your research and analysis into the development of your training and development strategy; your synthesis of material is comprehensive, with frequent demonstration of integrated and strategic thinking [9 10 11 12] **Mark** 9	*Well don... I feel you have analysed + interpreted your research well... you have made good links to Beeches data with account. The needs of the business...*	13-42.
AO4.1: Your critical evaluation of the likely effectiveness of your chosen strategy in meeting departmental and corporate aims and objectives is limited, and you make no real attempt to prioritise evidence or to select appropriate lines of argument from information contained within either your strategy or your research and analysis, resulting in weak, unsupported conclusions; you demonstrate limited clarity and coherence with only basic use of business terminology – errors of grammar, punctuation and spelling may be noticeable and intrusive; [0 1 2 3 4 5]	AO4.2: your critical evaluation of the likely effectiveness of your chosen strategy in meeting departmental and corporate aims and objectives is sound, and your evidence is appropriate prioritised, with appropriate lines of argument selected and presented from information contained within both your strategy and your research and analysis, resulting in sound conclusions; you demonstrate clarity and coherence, with appropriate use of business terminology – there may be occasional errors of grammar, punctuation and spelling but these are not intrusive; [6 7 8 9 10]	AO4.3: your critical evaluation of the likely effectiveness of your chosen strategy in meeting departmental and corporate aims and objectives is comprehensive and in-depth, and your evidence is effectively prioritised, with appropriate lines of argument selected and presented from information contained within both your strategy and your research and analysis, resulting in reasoned, appropriate, logical conclusions; you demonstrate clarity, coherence and fluency with effective and confident use of appropriate business terminology – there are few, if any, errors of grammar, punctuation and spelling. [11 12 13 14 15] **Mark** 11	*Good work. You have produced a critical evaluation which shows good evidence of strategic thinking. You have prioritised your influences + made well supported conclusions.*	57-61
		Total/50	39	

| If this work is a re-sit, please tick | | Session and Year of previous submission | Jan / June | 2 | 0 | 0 | | Please tick to indicate this work has been standardised internally | ✓ |

Please note: This form may be updated on an annual basis. The current version of this form will be available on the OCR website (www.ocr.org.uk).
Please complete one *Centre Authentication Form* (CCS160) for each unit and forward to the moderator with your sample.

Guidance on Completion of this Form

1   **One** sheet should be used for each candidate.
2   Please ensure that the appropriate boxes at the top of the form are completed.
3   Please enter *specific* page numbers where evidence can be found in the portfolio, and where possible, indicate to which part of the text in the mark band the evidence relates.
4   Circle the mark awarded for each strand of the marking criteria in the appropriate box and also enter the circled mark in the final column.
5   Add the marks for the strands together to give a total out of 50. Enter this total in the relevant box.

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F255/URS

Oxford Cambridge and RSA Examinations

GCE in Applied Business
Unit 16: Training and Development

Name:

Candidate Number:

Centre Number:

June 2007

Unit 16: Training & Development

Task 1

AO1

Training and development, deals with the design and the delivery of learning to improve performance within the business. Nowadays businesses use learning and development instead of training and development and order to emphasise the importance of learning for an employee in a business. Training and development is a process that employers use to give their employees the required skills and qualities that are needed for them to fulfil their job role successful and to the best of their ability.

Training is used to motivate the employees to do their job, which then satisfies the needs of employees and helps to improve the skills and knowledge of an employee related to a specific job.

In this assignment I will be covering the following that is listed below:
- Reasons for training staff
- Methods of training
- Programmes of training
- Training initiatives
- Internal & External constraints

Reasons for training staff

Below I will mention all the reasons why business gives their employee training and development. Training is provided for a variety of reason mentioned below. These are:
- Meeting departmental and overall business objectives
- Increasing productivity
- Introduce new technology
- Improving health & safety
- Creating a more flexible workforce
- Helping employees take on new job roles
- Improving job performance and motivation
- Satisfying UK and European legislation in areas such as employment and equal opportunities

Meeting departmental and overall business objectives

By trying to maximise effectiveness and efficiency businesses may send their employees to a training centre, so that they then could meet the businesses overall objectives. The training that an employees needs depends on what the department objectives are.

For an example if a business aim was 'to expand the business', therefore in the context of training, the business may consider its objectives to 'to recruit and train one new member of staff by May 2007' and 'to provide basic health & safety training for the new member of staff on their first day of starting work'. Having objectives like this then it will be likely that the training that the business will give to its employee are that in the way that they could use the machinery that they have or if the business

is a retailer they then might train the employee in how to use the checkpoint till. This will be able to be done in the method of on the job training.

If the business was going to recruit an employee because the business has installed in a new system in the workplace then it will be likely that the business will send this employee on a off the job training, so that this employee could then bring in skills that he/she can then use to the system.

To fulfil the objective the business will be making sure that they give the employee a healthy & safety training, so that the employee could work safely on the work place and also that they fulfil their objective. In order for the business to meet its objectives they should make sure that they objectives are smart.

For an example if a business had the objective of being profitable, training can be used to develop customer services skills so that as customers are satisfied, they will then want to shop at the business, which will cause repeat business, repeat could lead to an increase in profit.

It is very likely that businesses give employees training very often in all departments as businesses regularly change their aim and objectives once they are met. It is true to say that training helps business to meet their aims and objectives.

Training is provided to enable the business to meet its objectives, and helps creates direction and focuses for the business.

Increasing productivity

Productivity is the measurement of how much work an employee is actually doing in the time they are employed. Therefore if businesses send their employees on training the employees will then be more productive as they will be aware of the best procedures and methods to get the job done.

Businesses could send their employees to a training course where they can learn how to multitask, this way the business can become more efficient as employees will be able to other jobs when necessary. For business to increase productivity, they should offer employees training very often as they will be motivated and when employees are motivated it is likely that employees will be satisfied in their work.

The two types of training that are used to train employee to increase productivity is time management and decision-making. Time management so that the employee could then manage their time properly and then therefore will be able to finish the job on time. Training on decision-making will be needed so that the employee could then make decision more quickly and efficiently, without wasting any time.

Introduce new technology

As technology is moving on from day to day, business needs to train their employees, so that their employees could keep up-to date with the changes in the technology. Businesses should make sure that they require training to employees when there are changes in the software, so that employees then know how to use the software effectively, so that they produce documents properly. Training should definitely be given to employees when new systems are installed so that they are used as efficiently as possible. As if no training was received then the employees will find it difficult to use and manage the system, this therefore could cause problems. The problems that this can cause are one the employees will produce documents or machinery in a wrong way which then could effect the system its self. Businesses need to minimise impact of changes.

Business also may use training to help employees make greater use of the software that they are currently using. As there are many functioning on word documents that

are never accessed by users. By going to training employees could learn these functions, with learning these functions the employee may be able to do their job more quickly and efficiently.

As everyone is using technology on a day to day basis and due to this the amount of jobs that are available are decreasing as more companies have introduced tele-working so therefore employees need to be trained how they should pack shopping that is being delivered to homes rather than working on the tills.

As teleworking is being increased, so therefore employees need to be trained in how to use technology to work from home using IT services such as web cams and e-mail. This therefore makes them feel at ease and confident.

Improving health & safety

Employer's responsibilities is to provide health & safety training to its employees, this is so that know what to do in the event of an emergency and how they can make the workplace safer. The most important training that must be given to the employees is the first aid this is so that when an employee is injured then other employees that are working alongside with the one that is injured can then help the injured employees, as others will then have the training to do so. The cost of the First Aid training is very expensive as it cost business around about £214 for training up to 4 days. And also evacuation training should be given to the employee in case there is a fire in the workplace, therefore with having these training employees will be informed in what they should be doing. Health & Safety training should be provided to the employee when employees start the job new.

As giving employees health & safety training is a legal requirement, therefore all business should have a clear health & safety policy implemented with training available to support it.

If business gives their employees health & safety training then the training can help the business to:

- Prevent illness or injuries to employees therefore maintaining high productivity level
- Have a working environment where all employees are expected to work safe and healthy which can lead to an enhanced reputation for the company
- Minimise the financial costs of accidents such as lost working time and fines

Skills and knowledge that is needed by employees to work in a health & safety way should be considered when deciding upon the health & safety training.

Another example of Health & Safety training is a certificate in Health & Safety in the workplace. This certificate shows that the employee can safely work in the workplace, and knows most of the hazards that are caused within workplace.

Creating a more flexible workforce

Creating a more flexible workforce is important as employees will be more motivated and loyal therefore will create a happy workforce. Keeping employees aware of the latest developments by training them makes it much easier for those employees to be flexible. Training employees for other jobs with the business means that the employees have more knowledge and skills, which are good for the business in the long term. It is good for the business in the long term because then the employee can then carry out many jobs in the workplace. For example a checkout operative going on a management course could mean that as the employee has management skills therefore the employee will then have some skills to supervise. And also a wide range

of skills means that an employee will then therefore will be able to a several jobs within the workplace.

With having employees with several skills and knowledge the business can benefit from this. The way that a business could benefit from this when is when an employee is absent from their job, it is important if other employees are already trained and have the skills and the experience to carry out the job then the business does not have to disappoint customers or allow work to build up while they are off.

Flexible workforce could also be beneficial to a business when the business is busy at its key seasons; therefore if employees are trained in more than one area of the business they then can be more flexible where they are able to work.

Helping employees take on new job roles

Employees take on a new job role when they start at a new workplace, or when they have been promoted in a certain workplace. What I mean by promotion is when an employee has worked up the employment ladder. This is when an employee has been given a job role of a supervisor when currently the employee was a sales operative. Therefore when an employee starts on a new job role or is been promoted need the relevant training to support the new job role so that the employee is motivated and confident to do the job and also therefore can do the work more effectively. It is important to give employees training so that they feel adequately trained in order to be able to carry out the job role tasks and do them satisfactorily.

When employees are being promoted it is important the employer gives them all the necessary training and support that they need. As if the employees do not get the training and the support they need they will feel stressed and demotivated, which then could lead to illness and time off work, which therefore means this could lead to lower productivity.

Improving job performance and motivation

It is said that if employees feel more motivated it is likely that they will stay working in the business for longer. As when employees are motivated they then are confident in doing the job that they are doing.

Training employees can motivate employees and improve their job performance, which then could create happy workforce. Training employees motivates them because when they receive training they then do their job better as they will be proud about the fact that they are cared about and therefore will try to work harder. When employees are motivated they are better equipped to do their job, as they know what they are confident with the job. Training inspires to keep employees motivated.

Satisfying UK and European legislation in areas such as employment and equal opportunities

It is important for business to comply with both UK and European legislation. As it is essential for business to follow Health & Safety at work Act 1974.Here training may be needed to ensure that employees understand and comply with policies related to issues such as equal opportunities in order to make that any kind discrimination does not take place. Below are the UK legislations that business should follow:

- Employment equality –sex discrimination Act 1975& 1986
- Race relation Act 1976
- Equal pay Act 1970
- Rehabilitation of offenders Act 1974
- Disability discrimination Act 1995

4

- European working time directive
- Employment Act 2002
- Data protection Act 1998
- National minimum wage Act 1998
- Working time directives
- Maternity and paternity leave

The UK legislation above highlights some of the act that informs managers, supervisors, and owners that they need to be aware of when dealing with employees. Training needs to be given to employees in how they should recruit employees without breaching in of the legislations that are mentioned above.

It is important that businesses follows these laws and train their employees how to handle disciplinary or grievance procedures, as if they are not trained and go to the procedures it is likely that employees will take the business to an industrial tribunal, this when employees get compensation for being treated unfairly. This then gives business bad reputation.

It is important that business register when they have trained in a particular way. For example if a business trains an employee into a First Aider they must make sure that they have a certificate as a form of evidence.

Some of the UK and European legislation have changed the working time directive regulation limited employees to working hours which were 48 hours a week, and due to the change the employees could work for longer if they wish. The other legislation that changed was Maternity and paternity leave as currently was that parents of young and disable children were given the right to request flexible working arrangement. Now due to the changes the extended paid Maternity leave from 6 to 12 months and raise paternity leave pay.

Methods of training

For a business to train its employees a business will need to consider a method that they can use to train its self so that they can do their job with all the skills that are needed for them to be successful. The methods that a business can use are:
- On the job training
- Off the job training

On the job training

On the job training is when an employer gives the employees training whilst the employee is doing the job. This form of training is usually done in a couple of hours and is mostly done when the employee is using equipment at the workplace for the first time or if an employee is starting a new job. This method of training is cheaper for the employers as the employees are learning as they are working. So therefore the business does not have to pay the employee the expenses to the employee to take these training methods.

An example of on the job training is for an example if an employer shows an employee how to use the checkpoint at a supermarket, which can be done in a few minutes. The other time that on the job training can be used is when a company introduces a new machinery to produce a certain product quickly, so therefore the employer will inform the employee in how he/she can use the machinery, so that they can produce the products with no problem. The advantages of using this method is that the employee may feel more confident when they are being showed by employees they know rather than those that are complete strangers to them. And also with employers going for this method, they will find that this training method is also

productive, as the employee is still working as they are leaning, whereas if they do off the job training they will not be able to work at the same time. This method also gives managers assess to improvement over a period of time and this therefore makes it easier to identify a problem that is happening and then therefore resolve problems. The disadvantage of using this method are that if the person training doesn't have the skills and knowledge to train then this would mean that the training being done would be done to a sufficient standard. And also if the trainer has bad habits with using certain machinery then these will then be passes to the employee being trained.

Off the job training
Off the job training is when an employer gives the employee the opportunity to go on a training program that is based outside the workplace and outside working hours. The form of training is usually done in a program centre where the employee is trained by a trainer that is outside the workplace. An example of off the job training could be when a receptionist is sending to course to develop their communication skills, so that they then could talk to customers easily. Another example could be when teachers are sent on training, so that they then could deliver a certain course to students more sufficiently. The advantage of this method of training is that as the employee is outside the workplace he/she will be able to meeting other employee from other place that they have not met so therefore will be able to learn skills from them. The other benefit of this is that the employee will be confident, as there will be other employees at the training places that are there to develop skills in the similar area.
The disadvantage of using this form of training method is that it is very cost effective meaning that it will cost the business to send the employee on training, as they will have to pay for the training course and also the travelling payments. And also the training will not be productive, as the employee will not be working when they are learning. And also the employees may feel devalued if they are sent on an external course as they may feel that they are not good enough for the job therefore they are being sent on training so that they can do the job properly. The other drawback could be that the employees may already know what is being said on that certain course, this therefore can be useless.

Programmes of training
There are many ways that businesses could use to give their employees the training that they need. Below are the six main types of programme methods that I will be describing in detail, these are:
- Job shadowing
- Coaching
- Computer based learning
- In - house course
- Simulations
- External courses

Job shadowing
This is when someone follows another employee around his or her job role. The aim of allowing somebody to job shadow is, so that they could see what it is like to do the certain job that they are employed to do. The way that they do this by following the other person that is doing the job for a certain time and see what they are actually doing and how they react to certain situations whilst they working at the workplace.

Job shadowing allows employees that are operatives to see what it is like to be a senior manager or a director of the same business that the operative is working at. Employees can be motivated by this as they will be able to see where they could be in a few years if they try hard at the job they currently are at, if they get promoted.

Coaching

Coaching is a process where employees are trained to do a certain job that they are employed at or sometimes the job that they are willing to do. This programme allows employees to set targets for their own training and development as a coach is put to place to help employees to develop themselves. These types of coaches are sometimes recruited in the business. When they are recruited for an example there may be managers and supervisors that are asked to coach junior employees that are operatives. These people that are employed in coaching are specifically trained for this purpose or work in the same in the same industry, so therefore have the skills that are appropriate to the business. An example of coaching is when footballers are trained to play football before a tournament.

Computer based learning

Computer based learning is not about how to use computers it is a way that an employee could learn about a subject by using a computer. It is used when an employee learns by using the computer. Many businesses will offer computer based training that is available on their intranet site, so that employees can access to courses when they are needed. There are both benefits and drawbacks of using computer-based learning.

The benefits of using Computer based learning are it allows employees to study in their own time if they want to, and also there are no travel costs for employees to access online course and training costs can be kept law as organisations resources and computers are used.

The drawbacks of Computer based learning are that employees need to be highly motivated to complete a course. And also employees will need to be given access to enough computers at work and home and this can be very expensive to provide.

In - house course

In –house courses are courses that are designed and delivered by employees within the business. In-house courses can also be when a certain employee is selected to go on an external course and then bring back information, which is, and then learned by other employees is the workplace.

This type of course works out to be cheaper than external courses and is also targeted to the needs of the business. The drawback of this type of course is that it may not be seen important as external courses to the employees, therefore the course will not be taken seriously by employees that receive the course.

Simulations

Simulations can be used to plan what is going to happen as part of health & safety training. It allow employees to practise in a safer environment, something that the will carry out for real at a later stage. The advice given to the employees from the simulation can help an employee to improve when they are in the real situation. Pilots use simulators to see how they would react in a certain situation. This is a risk free method and also is cheaper.

External courses

These are courses where employees are sent of the business to receive training. This course can be done online, in person at training providers such as schools, training agencies. This course will run at certain times. And some the courses will give the employees with certificate that highlights that have the relevant skills.

The benefits of this course are that as the employee meets other employees from other business therefore they then could bring new ideas. The drawback of this course is that is can be very expensive and can be difficult to transfer skills that are needed for their job.

Training initiatives

These are designed to support employers and employees to view training and development seriously. There are three main training initiatives that encourage employers and the employees, these are:

- Investors in people
- Appraisals /performance reviews
- Learning and skills council

Investors In People

Investor In People is a company that gives business an award to improve the management and development of people in the workplace. Businesses can work towards Investors In People status by following their legal framework. Their legal framework is plan, do and review. Businesses are to plan their training so that is part of the businesses aims and objectives, do is when the business sends employees to the training that is required. And lastly they have to review the effect of that performance on the business as a whole. The Investor In People are mostly recognised by their logo as they have a unique logo.

With having Investors In People award, business can benefit from it. The benefits to the business are that:

- More satisfied customers as their input is measured as well
- More satisfied and motivated staff as their training and development needs are catered for which leads to increased retention
- Lower costs and wastage as people take more interest in their work therefore suggest ideas for ways to improve the business.

School have an Investor In People reward, with having this award other organisations will be able to see that   ' School train their staff in a professional and good way.

Appraisals /performance reviews

Appraisals and performance reviews are used by business to set targets for employees within the business. Appraisals are the opportunity for the manger and employee to agree targets for the future and performance reviews are when a manager meet in order to discuss how well employees have completed their work and where improvements can be made.

Appraisals and performance reviews help business organise and put into place its training and development methods because they provide opportunities to discuss what is going on well and not within the workplace.

Having Appraisals and performance reviews the needs of the employees to be linked in the aims and the objectives of a business.

When an employee is at an appraisal, the employee is asked by its supervisor or a manager to look at the targets that they have met since their last appraisal. If that have been met then the manager and the employee agree to another set of targets the employee needs to meet.

At a performance review both the manager and the employee both have a face-to-face informal conversation where they discuss what the employee has completed and what they haven't, at this point the manger will then give the employee some information on the way that they can improve if need be. By doing these review the mangers find out how productive the employee are and also what they weaknesses are .So according to their weaknesses, the employees are sent to training.

Learning and skills council
Learning and skills council is the government of England who are responsible for giving money and planning of education and training for people over 16 years. The purpose of the government doing this is to increase the amount of learners at this age and to make UK one of the most knowledgeable and skilled countries. And also to develop and meet training and education needs to individuals working.

The learning and skills council are trying to increase the amount of education and training in the workplace for adults, by giving the business the chance to make links with school and colleges.

Internal & External constraints
Training and development is an ongoing process in any business and needs to be constantly reviewed and updated. It is important for business to consider the effectiveness of the training and development that is used. The constraints that need to be considered are:

- How the effectiveness of a training strategy can be affected by internal and external constraints:
    - Legislation,
    - Competition,
    - Physical resources
    - Cost implications

- The problems associated with one-off training rather than ongoing training initiatives
- A radical change to a business's aims, such as expansion, causing a revision of training initiatives

How the effectiveness of a training strategy can be affected by internal and external constraints
A training strategy can be affected by internal and external constraints. External constraints are constraints that affect the business and cannot be controlled by business. Internal constraints are constraints that happen within the business and can be controlled. There are four key constraints on the training strategy. These are:

- Legislation
- Competition
- Physical resources
- Cost implications

Legislations

Legislations can affect the effectiveness of a training strategy, as the businesses need to make sure that they follow all the legislation. As the legislations are being changed very often and new law are being passed on then therefore the business need to train their employees as new working methods may be introduced. The legislations that a business needs to follow in terms of training are Health & Safety Act ant the Equal Opportunity Act. The businesses need to make sure that they follow the Health & Safety at work Act 1974 as because if they do not follow this Act the business will then find it difficult to survive. As the Act ensures that workplaces need to be safe as possible, so if the business is found by the government for not following this Act also not giving employees training on health & safety then the business will get bad reputation also then employees working at the workplace will not feel safe therefore then there could be a danger of the business losing employees to.

The other legislation that business needs to make sure that they do not breach is the Equal opportunity legislation. The sex discrimination Act (1975 and 1986) will need to be followed, as the business will need to make sure that they train all their employees fairly. As the business are not be send a female to a train course because they feel that as its a female she will be able to learn more quickly and not give the male any train as the business feel that the male staff may not concentrate. Businesses should make sure that they treat all the employees fairly and not to discriminate them because of they sex and should give all employees equal training opportunities.

The disability discrimination Act 1995 will also need to be followed because if there is employee at the workplace with some kind of disability orders they should also be send to training courses like the other employees in the workplace, even though they have a order as this does mean that the business needs to discriminate them and not send them on a training course.

If the business breach any of the legislations above they will find the employment tribunal taking them to court, which will lead the customer having a bad image of the businesses. And also this could also demotivate employees, which then could lead to the employees being less productive.

Competition

Business should always be aware of who their competitors are. If a business is not aware of its competition they will find their self in a very difficult position. As they will not know who they are competing against. This is because if the competitors give their employees better training than you as a business, the competitors will then attract the best employees to work for them, therefore then the business will find it difficult to find employees that the business could recruit.

A business may not train its employees at all as they do not want to waste money and time on training, so therefore will rely on its competitors to give training to its employees. They then try to attract the trained employees once they have the skills and knowledge from the competitors by offering them a higher salary or benefits. Competitors do this because as I have mentioned already to save money and time. As this is happening businesses are unwilling to train employees, as they feel that the may lose employees.

If this starts to increase within competitors, this will then know to be labour market failure.

Physical resources

Physical resources could also a constraint on the training strategy. As the business needs to make sure if they have all the resources that are needed to have a successful

training program. When talking about resources, the business needs to think if they have the space to carry out the training and also machinery that will be needed whilst undertaking the training course. They will also need to think about if the have the time to fully implement an effective training strategy.

If the business has not got the resources needed then the business needs to think if they have the budget to purchase the resources to implement the training course. If the business hasn't got the budget to purchase the resources needed they then have to think about the places that they will have to send their employees to for training and also about the cost of the training courses that they are going to send their employees at. It could rather expensive to send employees on external training courses.

Cost implications

To give training to employee can be quite expensive for the business. Depending on the size of the business will depend on the amount of budget that they have on training each year. As the amount of time a business sends its employees to training depends on the amount of budget that they have on training each year, therefore this could mean that a business may send one employee to training and then that employee could share it with the rest of the employees. To make sure that businesses spend their budget on training properly. The way that businesses could do this is by doing a cost –benefit analysis as this way training can be planned for and the money used to the maximum benefit. This way a business could see how much courses their employees could attend that year.

The other cost implication that business may have are that if there is demand for a certain course, then that training course may cost more. Internal courses are much cheaper then external courses

An example of the cost of an external training course at the Mill Wharf professional development in education is a company that trains teachers, and the cost for teachers to go this course is £195, this is very expensive for a one-day training course. As if the schools feels that about 10 teachers will benefit from this they then are expecting a big bill as it will cost them about £2000 which is a lot of money.

The problems associated with one-off training rather than ongoing training initiatives

The problems associated with one-off training rather than ongoing training initiatives are that if an employee receives a an off training and nothing is followed up afterwards because unless there is a follow up after a training, then the skills that the employee learned from the training are likely not to be carried forward. And therefore there is a risk of the employees forgetting what they have learnt.

But if an employee receives an ongoing training then employees will then be able to use these skills in to action. Even though if an employee goes on a training course for only once and then comes back and shows other employees of what the employee has learned then the employee will be using its skills but at the same time putting them to action, which means that the employees will then therefore benefit from what they have learned whilst on the training course.

As if a business sends its employees on ongoing training courses, it will be very expensive than off training courses. But as an on going training course is expensive it is likely that the employee will take what has been said on board and will understand therefore will be able to put the learning into action.

<u>A radical change to a business's aims, such as expansion, causing a revision of training initiatives</u>

When a business has to change it businesses aims cause they have expanded, they then have to review their training initiative. The training initiatives that the business has to review are:

- Investors In People
- Appraisal/ Performance Reviews
- Learning and Skills Council

<u>Investors In People</u>

As the business expands it may then decide to apply for an Investors In People reward. When the business expands it is more likely that the business will apply for the reward, as they will have more employees it will make sense for the business to plan its strategy to improve the performance of the business, as they will have more facilities on the job to train their staff. Even though the business can apply for the Investors In People as a small business .

<u>Appraisal/ Performance Reviews</u>

As a business has expanded therefore this will mean that the business then therefore has employed more employees so that that then could meet their aims and objectives. As the now has more employees employed they may decided to implement and introduce Appraisal/ Performance Reviews so that the mangers could then see how well the employees are doing and then could compare them with others employees within the workplace and see how well they are doing, and then could come up with targets that could be beneficial to all the employees.

<u>Learning and Skills Council</u>

If the business expands and its business aim change this training initiatives will not change or effect the changes of the business in any way because the Learning and Skills Council will still give those employees the benefit of training if they are still entitled to the scheme.

Task 2 (A03)

In order to make sure that the market research that I undertake is successful, I am going to plan my research so that, when conducting my research I know what I am doing, so that it is then successful. As part of the planning of my market research I will include the following:

- Setting of aims and objectives which fit within the framework of departmental objectives and overall corporate objectives
- Targeting research at the appropriate audience e.g. the workers within the two functional areas
- Types of research, which are most suitable for generating the required information

Setting of aims and objectives which fit within the framework of departmental objectives and overall corporate objectives

The aims of the 'Beeches Alternative Health Clinic' are:

- To increase their customers base by a further 7% during the year
- To reduce the number of missed appointments from 5% to 2%
- To offer excellent customer service

In order to meet these aims Sally and Brian the owner have set the following objectives:

- To set up their own website by the end of the year
- To instigate a text reminder service generated through a computer program within the next three months
- To plan customer service training for front of office staff within the next six months

In order for my aims and the objectives for the training and development plan to fit within the framework of departmental objectives and overall corporate objectives, I will be setting my aims & objectives as the following;

- To meet departmental and overall business objectives
- To introduce new technology
- To help employees take on new job roles e.g. due to promotion or taking on new responsibilities
- To improve job performance and motivation
- To improve health & safety

I have decided to choose the objective 'to meet departmental and overall business objectives' I have decided this because if the employees are not given the training that will help the business to meet the its aims and objectives, then it will be likely that they will not be successful. For example one of Beeches Alternative Health Clinic objective is 'To plan customer service training for front of office staff within the next six months', so therefore if the employees were sent to on a Health & Safety training program rather than a customer service training program, then Beeches Alternative Health Clinic will not be meeting its overall corporate objectives, which will then effect the success of Beeches Alternative Health Clinic.

The other objective that I have decided to have is 'to introduce new technology' I have decided upon this objective because the owners of Beeches Alternative Health Clinic are planning to consider how the new ICT systems would impact on the job roles of all members of the staff, so therefore are deciding to introduce a new

computer system where they could record clients appointments and also introduce a text message system where they could text the customers a day before the appointment. They are also negotiating a chip & pin system with its bank. Also by having this objectives I will be meeting the overall corporate objective of the Beeches Alternative Health Clinic which is 'To instigate a text reminder service generated through a computer program within the next three months'. When Beeches Alternative Health Clinic is considering introducing technology to be more successful. Beeches Alternative Health Clinic will also need to consider that for the technology to be efficient and useful they will need to make sure that they give their employees training and support is required for the technology to be efficient.

The next objective that I decided upon was ' to help employees take on new job roles e.g. due to promotion or taking on new responsibilities' I decided upon this because as the employees at Beeches Alternative Health Clinic have taken on new roles due to promotion. Sultana has bee promoted to take the Administration Manager and the therefore needs customers service training, so therefore she doesn't find it difficult to provide good customer service to the customers. So by offering Sultana and the other receptionists Paul, Charlotte and Dawn the training on customer service then the employees will be able to offer good customer service, which will then give Beeches Alternative Health Clinic a good image, and also they will then be meeting their overall corporate aim 'To offer excellent customer service'.

The next objective that I decided upon was 'to improve job performance and motivation' I decided upon this because I overall believed that if an employee is motivated enough to their job role then it is likely that they will do their job better and more efficiently. As at Beeches Alternative Health Clinic the staff were dissatisfied with the current staff training programmes that were available, which therefore shows that they were not motivated so therefore by providing the employees with satisfactory training programmes it will be likely that the employees will be motivated.
When employees are motivated it is likely they will work efficiently which means that Beeches Alternative Health Clinic will therefore meet their aims & objectives as the employees will not let them down.

The final objective that I have decided to include is 'to improve health & safety' I decided upon this because the owners Sally and Brian highlighted that Health& Safety training for all new and current members of staff will be the main focus of the staff development budget over the next six month. This is because the Health & Safety is legislation so therefore they will need to make sure that they are not breaching it in any way.

Targeting research at the appropriate audience e.g. the workers within the two functional areas

The two functional areas within the chosen business that I am going to target my research at are the Finance and the Administration department of Beeches Alternative Health Clinic.
In the Finance department currently Brenda works here and does the day-to-day finance for the business. As the business has no facilities to accept debit or credit cards so therefore customers make their payments by cash and cheques. The main job at the finance department is balancing the accounts at the end of each day and banking

the money received. Within the finance department the employee is also responsible for compiling the cashbook, checking suppliers invoices and making appropriate payments and also is responsible for completing the bank statements at the end of each month. All booking keeping is currently completed manually and typing is done by the use of an electronic typewriter, this shows that the business systems are very out of dated.

In the Administration department there are four part time receptionists. The responsibilities of the receptionist are meeting & greeting clients, answering the telephone, booking new appointments, selling a variety of products, assisting patients in completing 'the new questionnaire'. Currently in the administration department also all bookings and patients records are done manually, patients have their own set of records kept in a folder, which are then filed alphabetically. Once again this department also has no new system in place that uses technology.
The people that I am going to be speaking to in order to gather my research are Sultana, Paul, Charlotte and Dawn that work at the Beeches Alternative Health Clinic.

First of all I will be talking to Sally and Brain, this is because they will be able to give the relevant information about what they are planning to do and also will be able to clarify the corporate aims & objectives of Beeches Alternative Health Clinic. They also will be able to provide us what the business is wanting to do and where it is wanting to be in a few years time so that I then could see what training strategy Beeches Alternative Health Clinic will be needing in the future.

I will also be speaking to Brenda the Finance Manager in the Finance department. I will speak to her, so that she then could inform me about the skills and knowledge that she already has so that when I produce a training and development strategy for the department, so therefore when I will be able produce a training and development strategy that meets her needs and also improves the business image. When speaking to Brenda I will be asking her about the tasks that she under takes and also her strengths and weaknesses because there will be no point if I produce a training strategy that allows the Brenda to develop her database skills, when this is one of her strength.

The other people that I will be speaking to are from the Administration department. The people in the administration department that I will be speaking to are Sultana the Office Manager and the receptionists Paul, Dawn and Charlotte. I will be speaking to Sultana the Office Manager because I will like to know what skills and qualities she already has to do this job and also what her strength and weaknesses are, so then this could give me an idea of what she already knows. By speaking to the receptionists, this will then give me an idea of what skills the receptionists already have and also will be able to explore skills that are needed for the job within the deoartment, when I see then undertaking their job role. All interviews will enable me to complete an effective and realitive skills gap analysis.

Types of research, which are most suitable for generating the required information
The type of research methods that I am going to use to gather the required information that will be needed is by doing primary research. The way that I am going to conduct primary research is:

- Questionnaire and surveys to gather information on workers within the two chosen functional Ares and their training and development needs
- Discussion with a member of senior management to gain second perspective on the training and development needs of staff-this is so that the senior management could then inform me of their aims & objectives that they are wanting to achieve, so by talking to the senior management I will receive the information needed.

  The way that I will be doing this is by having a face-to-face discussion with the senior management and asks them the required information that is needed. The advantage of this to me is that, as I will be conducting a face to face discussion I will also be able to see the face expression on the senior management which will then show me whether or not they are informing me the truth or not. The other advantage is that as when I have a face to face discussion, and if the senior managements do not understand any questions asked I will be able to interpret to them, whereas if I did it like a postal questionnaire and the senior managements did not understand they will leave the questionnaire unfinished or with unwanted answer which then will not be reliable.
- Discussions with workers on what they consider to be the most effective forms of training programmes - this is so that when designing the training & development strategy, the program that I design meets their needs of the employees and also therefore motivates them. The way that I am going to this is by designing a wide range questions that I then will be able to ask the employees, so that they then could answer, the method that I will be using is Face to face discussion.

I also will gather secondary research by:
- Getting example of training and development initiatives that take place in other businesses-so that I could then see what other businesses offer their employees, to motivate their employees. I will be visiting a wide range of companies' websites and seeing what they offer their employees, I may also visit many companies' personnel to see whether they have any training and development packages.

A positive start.

16

Paul.

Questionnaire for Receptionists

1. How would you rate your customer skills?

Poor	Satisfactory	Good	Excellent
✓			

2. Do you currently have any skills to support new clients through their initial registration with the clinic?

YES	NO
✓	

3. How would you rate your telephone skills?

Poor	Satisfactory	Good	Excellent
		✓	

4. Do you think you are equipped with the experience and knowledge on how to use the 'chip and pin' system?

YES	NO
	✓

5. How would you rate your knowledge of the products currently sold within the clinic?

Poor	Satisfactory	Good	Excellent
		✓	

6. Do you have any basic understanding of the format and information available on the current website?

YES	NO
✓	

7. Could you offer basic advice to customers on the services the clinic currently offers?

YES	NO
✓	

8. How would you rate your skills in remaining calm when under pressure?

Poor	Satisfactory	Good	Excellent
✓			

9. Do you have any skills or knowledge on effective time management?

YES	NO
	✓

10. Do you have the ability to work as part of a team?

YES	NO
✓	

11. Would you be interested and participate in training leading to qualifications?

YES	NO
✓	

12. What methods of training do you prefer:-

Internal	External	On-the-Job	Off-the-Job
		✓	

Sultana's Questionnaire

Do you feel that you are able to manage a small team effectively?

Yes =	No = ✓

What evidence have you got to support your response?

has no managerial experience.

Do you have the ability to think quickly in order to overcome and deal with problems?

Yes = ✓ Calm under pressure	No =

Will you be able to rate yourself on how quickly you are able to deal with problems as and when they arrive. One being seen as instantly, 2 - it takes an average amount of time, 3 - takes a long time to solve the problem.

1 =	2 = ✓	3=

Do you have the ability to remain calm under pressure?

Yes = ✓	No =

What evidence have you got to support your response?

remaining calm under pressure.

Are you able to prioritise your workload?

Yes = ✓	No =

Are you able to communicate with other fellow members of staff and customers-

Yes = ✓	No =

How would you rate your communication with other members - 1- excellent, 2- satisfactory, 3- communication is not too great.

1 = ✓	2 =	3=

If you have written no and so are unable to communicate with other members, why do you feel this is and how to you feel you are able to improve this.

Considering the way that you communicate with other members and customers, what effects do you feel this has on the company.

Build good relationship.

Are you able to organise staff rotas and delegate work as required

Yes = ✓	No =

Do you feel you are able to organise and implement a staff appraisal system

Yes =	No = ✓

If yes, how would you rate yourself on your ability to do this - and if no how do you feel you will be able to gain this experience.

Are you able to demonstrate good time management skills -

Yes = ✓	No =

If yes, How would you rate yourself on your ability to demonstrate good time management skills. 1- excellent, 2- satisfactory, 3- not too good.

1 =	2 = ✓	3=

How would you rate yourself on your ability to provide a good customer service, 1- excellent, 2- satisfactory, 3- you are unable to provide good customer service.

1 =	2 = ✓	3=

The standard that your customer service is provided at, how do you feel this effects the business and do you think there is a need for your service skills to be improved.

yes because it is average and could be improved.

Do you feel you are able to help, plan and run staff training -

Yes =	No = ✓

If no, why do you feel this is?

has not planned / organised runned staff training

Have you got the ability to run software applications effectively-

Yes = ✓	No =

How would you rate yourself in being able to use the software, 1- excellent, 2- satisfactory, 3- unsure how to use.

1 =	2 = ✓	3=

Do you have sufficient knowledge on the Data Protection Act

Yes =	No = ✓

19

Have you got the ability to work part of a team

Yes = ✓	No =

Do you feel you will easily be able to adapt in situation where you will have to stand in for other members in the admin team as and when required -

Yes = ~~~	No = ✓

If no, why would you not be able to do this, -

How would you overall rate your ability to do your job

Satisfactory; because she's keen to take the Job, however is worried might not be able meet all the compentences.

What do you feel are your strengths?

refer to role skill gaps anylisis.

What are your weaknesses?

refer to skills gap A.

Do you feel training could help improve your performance?

Yes = ✓	No =

Do you feel Beeches provide enough information and training for you to be able to carry out the job effectively?

Yes =	No = ✓

How would you rate the training provision at Beeches Alternative Clinic?
1- excellent, 2- satisfactory, 3- poor

1 =	2 =	3= ✓

What training if any have you received lately, and do you feel there is a need for more training to be provided for you to carry out the job effectively?

No training recieved lately, yes.

What type of training do you prefer?

On the job	Off the job	External	Internal
✓			✓

20

Questionnaire for Receptionists

1. How would you rate your customer skills?

Poor	Satisfactory	Good	Excellent
		✓	

2. Do you currently have any skills to support new clients through their initial registration with the clinic?

YES	NO
	✓

3. How would you rate your telephone skills?

Poor	Satisfactory	Good	Excellent
		✓	

4. Do you think you are equipped with the experience and knowledge on how to use the 'chip and pin' system?

YES	NO
✓	

5. How would you rate your knowledge of the products currently sold within the clinic?

Poor	Satisfactory	Good	Excellent
✓			

6. Do you have any basic understanding of the format and information available on the current website?

YES	NO
	✓

7. Could you offer basic advice to customers on the services the clinic currently offers?

YES	NO
	✓

8. How would you rate your skills in remaining calm when under pressure?

Poor	Satisfactory	Good	Excellent
		✓	

9. Do you have any skills or knowledge on effective time management?

YES	NO
✓	

10. Do you have the ability to work as part of a team?

YES	NO
✓	

11. Would you be interested and participate in training leading to qualifications?

YES	NO
✓	

12. What methods of training do you prefer:-

Internal	External	On-the-Job	Off-the-Job
	✓		

Questionnaire-for the owners

Name:- _____

1. What methods of training do you currently provide?

No we provide no training at all

2. What types of training do you currently provide?

None

3. What training initiatives do you currently provide?

None.

4. How would you currently rate your training strategies?

Excellent	Good	Satisfactory	Poor
			✓

5. What are the strengths of your training provision?

None.

6. What are the weaknesses of your training provision?

Weaknesses is that no training provision is provided at all currently.

7. What constraints effect your training provision?

As we don't have a training provision therefore there is no constraint effecting it

8. What improvements do you think are needed in your training provision?

Implement a training strategy, as training currently is not offered within the business.

9. Which area in the business would you say training is most likely to be needed?

In all departments, as no training is given to any employees.

10. Do you have enough finance available to run your training programmes successfully?

Yes as we make profit.

11. What further training is needed in order to fulfil your company's aims?

As we currently don't have a training provision, therefore to meet our aims, we need to implement a new training strategy.

Training & Development Questionnaire For Finance (Brenda)

The following questions are related directly to your ability to perform your job effectively.

1. Are you able to work independently?

Yes	No
✓	

2. Can you manage your workload effectively?

Yes	No
✓	

3. Have you had experience at using a computerised accounts package?

Yes	No
	✓

Please specify which one and what you have used it for?

....
....
....
....
....

4. Do you have any knowledge on the Data Protection Act?

Yes	No
	✓

5. Do you have any knowledge on the Health and Safety at Work Act?

Yes	No
	✓

6. How would you rate your time management skills?

Good	Satisfactory	Poor
	✓	

7. How would you rate your customer service skills?

Good	Satisfactory	Poor
	✓	

Speaf in dealing with customers on the telephone, No form of customer service training.

8. How would you rate your communication skills?

Good	Satisfactory	Poor
✓		

9. Have you got the ability to run an effective stock control system?

Yes	No
✓	

Specific to manual stock control system.

24

10. Do you have any knowledge on the recruitment & selection process? If so, please state when last used?

yes, but she has limited knowledge, but is able complete recruitment & selection paperwork, was last used on the previous employers.

11. Do you have the required ICT skills to create and maintain the company website?

Yes	No
	✓

12. Do you have good team working skills?

Yes	No
	✓

13. Are you able to plan, organise and run staff training to each individual?

Yes	No
	✓

14. Have you got the ability to undertake market research in order to review current marketing policy?

Yes	No
✓	

However not in great detail, can only undertake market research survey.

15. Do you have the knowledge to undertake risk assessment for the use of computers in the front office?

Yes	No
	✓

because she never has used them.

16. How would you rate the overall training provision at the Beeches?

Excellent	Satisfactory	Unsatisfactory
		✓

17. Would you be happy to receive training that is linked to a formal qualification?

Yes	No
✓	

18. What impact do you think further training would have on your ability to do your job?

She will be able to expand her skills & knowledge & make good use of time effectively & will be able to use her qualification in DTP more effectively by having training on her qualification to much up on her skills.

19. Which training method, would you prefer?

On -the- job training	Off -the-job training
✓	

because she currently enjoys her time at work.

20. Which type of training programmes would you prefer?

Job Shadowing	Computer-Based	In-House Courses	External Courses
	✓	✓	

She has to use compter-based training for her account package.

Task 3-Skills Gap Analysis

An aim is a specific target/goal that a business is trying to achieve. Every business has aims so that they know what they are trying to achieve. The overall business aims for Beeches are:
- To increase their customer base by a further 7% during the year-short term aim
- To reduce the number of missed appointments from 5% to 2%-medium term aim
- To offer excellent customer service –short term aim

To enable Beeches to meet their overall aims they have set some objectives that will allow them to meet their overall business aims. The Beeches overall business objectives are:
- **To set up their own website by the end of the year**-Beeches are willing to set up a website that will allow their customers and others to see the range of products that they offer and the cost of them so that the customers are aware of the range provided when they visit the clinic. In order for Beeches to meet this objective they will have to make sure that they provide their employees with all the training that is needed to maintain the website. As if the employees do not have the training required to maintain the website, in the long run they will find that as the employees do not have the required skills to change the information on the website they then may find that as the information on the website is not updated this then could give the customers a bad perception of Beeches, as it could give the customers the perception that Beeches can not be bothered to update the website. For Beeches to meet this objective they will need to make sure that they provide the staff carrying out this job with required training so that they could benefit from this in the long run. If the business does this then the business will be meeting its overall aim which is ' To increase their customer base by a further 7% during the year' they will be able to meet this aim as when they have a website they targeted market will increase as people all around the world will be able to access to the site, therefore this will allow Beeches to increase the customers base.

- **To instigate a text reminder service generated through a computer program within the next three months**- Beeches are wanting to instigate a text reminder service generated through a computer program within the next three months, this means that they will need to train their staff in how to use this so that they then could benefit from this. Training is needed as the employees will know how to use text messaging but will need training on when it is generated through a computer program, without the required skills it will be very difficult to use an ICT system. Without providing the sufficient training in using this system, Beeches will not be able to meet this objective. By successfully meeting this objective the business will therefore then meet its overall medium term aim, which is 'To reduce the number of missed appointments from 5% to 2%'. This is because as the customers are reminded of their appointments, it is then more likely that they will remember to attend their appointment, as all customers then attend this will then reduce the amount that are missed.

1

- **To plan customer service training for front of office staffs within the next six months-** Beeches are planning customer service training for front of office staff within the next six months. This will allow them to attract more customers as if customers are pleased with the service that they are receiving, they will want to come to the clinic at the business again. Training in how to talk to customers in a good manner, communicating with them properly, being polite and calm, could be a form of training that the staff may need in order to meet this objective. With providing the staff with customer service training Beeches will be meeting their overall aim 'To offer excellent customer service' as if the employees have the required skills then they will be able to offer excellent customer service to the customers. Without the relevant experience and skills, staff will not know how to provide excellent customer service, which could mean that customer needs are not being met.

2

Skills Gap Analysis

Brenda		Sultana	
Existing skills& Knowledge	Training Needs	Existing skills& Knowledge	Training Needs
• Able to work independently • Manage her workload • Good communication skills • Able to manage time effectively • Has knowledge to use a desktop publishing program to produce marketing materials • Able to design and send e-mail • Has the experience to use a manual stock system • Ability to undertake market research • Flexible worker • Has limited experience on working as team member • Excellent telephone manners • Has experience on creating recruitment & selection materials	• On computer software as has limited knowledge of computer software • Knowledge on Data Protection Act • Knowledge on the Health & Safety Act • Improve time management skills • Improve customer service as she only has limited face to face to face interactions with customers • Needs ICT skills to create and maintain the company website • Needs good team working skills • Needs to be able to plan, organise and run staff training • Limited knowledge on risk assessment	• Can work independently and manage time effectively • Can prioritise workload • Customer service skills satisfactory • Excellent communication skills • Able to organise staff rotas • Able to run software applications effectively • Build good relationship with members of staff • Remain calm under pressure • Flexible worker	• On how to manage a small team effectively • Training on organising and implement a staff appraisal • Limited skills on customers service, needs customer service training • Knowledge on the data protection act • Can not plan, organise and run staff training, so needs training • Training on managerial experience

1

Paul		Charlotte/ Dawn	
Existing skills& Knowledge	Training Needs…	Existing skills& Knowledge	Training Needs
- Excellent computer skills - Good team working skills - Appropriate tone to answer the telephone - Good working knowledge and knowledge to support the new clients - Has experience in web designing and maintaining	- Training on customer service as has lack of customers service skills - Lack of skills on how to use chip and pin system - Lack of knowledge on sitting position/Health & safety at work act - Cannot work under pressure	- Has reasonable customer service skills - Able to communicate with others - Able to answer telephones correctly - Able to use computerised payment methods - Able to work in a team - Able to empathize with other - Able to manage time effectively	- Needs customer service skills - Lack of computer skills, so needs computer skills - Lack of knowledge on products so needs about the products - Lack of understanding in treatments offered.

Analyses of skills Gap Analysis

After producing a skills gap analysis I can see all the necessary skills that are needed by the business for in order for them to meet the overall business aims and objectives. By looking at the skills gap analysis I could see that the training that all members at Beeches need are customers service skills. Below I will be looking at the all the necessary skills that are needed in the two functional areas. These functional areas are:
- Administration department
- Finance department

Administration department
The training that every employee in this department needs is customer service skills. This is because by looking at my skills gap analysis I could see that none of the employees have ever had any formal training that is connected with the customer service skills. As currently none of the employees working at Beeches have never had any training in customers service training and in the past years have been offering the customer service that they thought was customer service. As customer service skills are really important in this department, as the employees in the administration department are the first people that the customer meet, and if they do not receive the sufficient service that they require this then means that Beeches re not meeting their customer needs.

The employees that are working in this department are Sultana, Paul and Charlotte /Dawn.

Here now I will be looking at the training that Sultana needs is 'training an organising and implementing a staff appraisal. To allow Sultana to get training in how she could implement staff appraisals is by job shadowing Sally the owner of Beeches, this is because Sally has the necessary skills to implement staff appraisals. As Sultana will be the administration manger and will have all the employee data, therefore Sultana will also need knowledge on Data Protection Act. As no other member in the company has sufficient knowledge on Data Protection Act, therefore Sultana will have to go on a course to have knowledge on the Data Protection Act. Both Sultana and Brenda have to plan, organise and run staff training as both of them do not have the skills and the knowledge required therefore, both of them will have to go to a training course that will offer them the skills in how to plan, organise and run staff training.

Sultana will also need training on managerial experience, as she will have to manage the rest of the administration department and as Brenda has limited experience on working as team, therefore could have an internal course with Brenda.

Charlotte/Dawn also work in the administration department and are the receptionist. The skills and knowledge that they need in order to complete their job role effectively are as they have 'lack of computer skills' they therefore need training on how they could improve their computer skills. The way that they could this is by job shadowing Paul who also is a receptionist. Paul has excellent computer skills, which means that by Charlotte/Dawn job shadowing him and seeing the way that he uses the computer they could also develop their computer skills. By doing this Beeches will be able to save money on sending them to an Information Technology course.

The other knowledge that Charlotte/Dawn require is the lack of knowledge on products and the treatment that they offer the customers. To fulfil this gap

Charlotte/Dawn could have an informal talk with Sally and Brian, as they own the business there fore will have the perfect knowledge on the products and the treatments that they offer their customers. By offering Charlotte/Dawn with the knowledge about the products and the treatments that they offer then for the moment Charlotte/Dawn will not have any gap in the training.

As I have already mentioned that Paul is also another receptionist that work at Beeches. By looking at the skills gap analysis I could see that the training needs that Paul has are that he has lack of skills on how to use the chip & pin system and as this is important because this is a method that Beeches use for payments, so therefore if this is not done properly than the business could make a loss and the customers will also be dissatisfied if extra cash is taken out of their accounts. For Paul to receive this training Beeches could send him to course where he could learn these skills from, as currently none of the member have these skills, so therefore he could not get receive these skills from any other members.

The other skills that Paul requires are that he has lack of knowledge on sitting position/ Health & Safety at works Act. As currently Paul does not know how to sit at a computer desk properly which means that, he does not create a good image to the customers as he is at the front desk and is the first that the customers meet. Therefore to overcome this problem Beeches could send Paul to another business for job shadowing or on courses. Paul cannot work under pressure, which means that when he has a lot of work to do he can concentrate. I therefore think that Paul should get his training from Brenda as she can manage her workload or he could get training from Sultana as she could also prioritise workload.

It is important that Beeches offer they receptionist all the required skills that they need this is because, if they do not receive the relevant skills needed they will never be able to carry out the their job role efficiently. This then could effect Beeches in the long run cause all the employees have lack of customer's services skills, therefore if customers are not happy with what they are receiving then they are likely not to come to Beeches again.

Finance department

The only person that works at the Finance department is Brenda. Brenda is the finance manager; she is able to work independently and has good communication skills.

The skills and knowledge that Brenda needs in order to make sure that has all the required skills to successfully carry out the job are that she has limited knowledge on computer software, as she has limited knowledge on this and Paul has excellent computer skills, I therefore feel that if Paul trained Brenda in how to use the computer software then this way the Beeches will be able to save costs on sending Brenda to an Information Technology Course.

As Brenda will be the finance manger and will have all the employee data, as she will paying them wages therefore Brenda will also need knowledge on Data Protection Act. As no other member in the company has sufficient knowledge on Data Protection Act, therefore Brenda will have to go on a course to have knowledge on the Data Protection Act. Sultana also does not have any knowledge on the Data Protection act, so therefore both could go together.

Brenda cannot manage her time effectively and Sultana can manage time effectively, therefore to make sure that Beeches use their money wisely, I therefore recommend that as Sultana could manage her time effectively, therefore Sultana should share her

skills with Brenda. This way as Brenda is alone in the department she then will be able to mange her time effectively.

Brenda has limited customer service skills as she has experience on talking to the customers over the phone, but really does not have any experience in customer service when having a face-to-face conversation with the customers. I therefore that Brenda should also go a customer service-training course.

As Paul has experience in web designing and maintaining it I therefore recommend that he trains Brenda in how to design and maintain a website as Brenda needs training in how to design and maintain the company website. This way once again Beeches will be able to save costs on sending their employees on training courses. Paul also has good team working skills whereas Brenda needs to develop her skills in good team working skills. By sharing their skills with each other it will be beneficial to Beeches and the employees because Brenda will be confident in learning from Paul, as she knows him rather than being sent of an external course.

As Brenda will be planning, organising and running staff training, she therefore needs to have the required knowledge so that they successful could conduct this. Therefore will have to go to a training course that will offer them the skills in how to plan, organise and run staff training.

Both Brenda and Sultana will need to receive Health & Safety training, as this is relevant to the positions they are at. As Brian has the relevant knowledge of Health & Safety, therefore will receive this training from Brian.

Analysis of secondary research

There are three training and development initiatives that take place in businesses. The three training and development initiatives that take place in businesses are:
* Investors In People
* Appraisals /Performance reviews
* Learning Skills Council

Investors In People

Investors In People is a company that gives businesses an award to improve the management and development of employees in the workplace. There are many businesses that work towards this award. In the year 2006 many companies received this award. The companies that received this award are:
* Merseytravel
* GS contracts Joinery
* Metro
* Fujitsu service
* Sweyne Park school
* Morley High School
* NCP
* Komatsu UK
* Base connection

Merseytravel

Merseytravel is a public sector travel organisation that achieved the Investors In People about 3 years ago. But they feel that by achieving this award, they have benefited a lot. As Merseytravel gained an improvement in staff retention with turnover now at just 4%, and Merseytravel therefore were known as the best for any passenger transport executive in the country. And also were recognised by the TUS as a best employer, when they took a partnership approach to learning and development with the trade union.

By being recognised with the Investors In People award and having an improvement in staff retention with turnover 4%, this shows me that by having Investors In People, motivates staff to stay with the business for longer, as they receive sufficient training to carry out their job, therefore feel confident in doing the job for a longer period. This also shows me that if Beeches invest in the Investors In People Award it will allow them to give their employees the training required so that they could also improve their staff retention than before.

Having an Investors In People initiative also shows me that, it allows/ motivates companies to spend time and money into training their employees. Having an Investors In People initiative shows that companies have to go through less disciplines/grievances procedures, as employees are happy with what they are receiving .As since Merseytravel have received this initiative this has reflected in a 10% drop in the number of disciplines.

Currently Beeches have had their employees working for them for a long time, Beeches have not hard this problem before, but if they have Investors In People award this shows me that they will never have to go through these procedures. By looking at this Information I could see that If Beeches decide to apply for the Investors In

People they will also be able to keep their employees for a longer time and therefore will also be able to attract new employees quickly to Beeches as this award will be able to show the customers that Beeches is a business that takes care about its employees so therefore spends the time and the money on their employees.

GS Contracts Joinery

GS Contracts Joinery is a company that undertakes projects such as building speakers and deck consoles for nightclubs. But now has expanded and progressed on to interiors design, manufacturing and installation work for the commercial, leisure and catering industry.

This company has achieved the Investors In People initiative, and believe that the Investors In People recognition played a major part in the successful development of the business.

They believe this because before receiving the Investors In People recognition they believed 'prior top gaining standards we were running around like headless chicken s, with no procedures, polices or training in place'. But by receiving the Investors In People recognition, they believe they are now a far more structured company. This shows me that when companies spend time and money into training their employees, and receiving the Investors In People recognition, they become pleased with their effort and try harder to be known as one of the best.

By looking at what GS Contracts Joinery felt by receiving the Investors In People recognition, this shows me that if this initiative did not exist, then it would have been more likely that companies would have not been bothered in offering employees the training required.

This company also feels customers come to them not only for their products, but also because of the high quality of service they receive from our staff. This therefore shows me that by spending time & money into training employees and receiving the Investors In People recognition means that companies could be benefited as it will increase customer base and also customer service provided to the customers by the business .As customers base increases this means that companies like GS Contracts Joinery could increase their sales level therefore profit levels.

As currently Beeches have limited customer service skills so if Beeches receive the Investors In People recognition, it will be likely that they will be able to improve their skills, as this case study has highlighted to me that customer service skills is a big issue.

It also shows me that customers have a believe that companies that have achieved the Investors In People recognition are likely to have high quality service as the employers are known to have spend time and money into training their employees. This company feels that high quality standards bring benefit to small business .I now am aware that every decision made by a company will bring benefits to them, therefore it is a matter of making the correct decisions. When I implement a training strategy for Beeches, I will be aware that the Investors In People initiative will bring benefit to them.

Metro

Metro is the newspaper publisher, which has set a trend by distributing the world's largest newspaper and the fourth biggest newspaper in the UK.

They also have achieved recognition as an Investors In People and implemented a structure that would encourage excellence and loyalty amongst its people.

Metro believe that excellent people will create excellent products, this therefore shows me that companies provide their employees with necessary training, so that they successful could carry out their job role, so that the company could benefit from this. The Investors In People initiative allows companies to train their employees, so that they could become excellent people and create excellent products.

Metro also states that Investors In People give them a comprehensive framework, and structure, which gives them focus and keeps them on track and helped them to attract and also to retain the best people.

The above shows me that as Investors In People gives companies' comprehensive framework and structure, this allows companies to gain the award, as they have a structure that they have to go through, therefore the companies become assured that they are going on the right way and like to achieve the award.

The Investors In People initiative allows companies to attract the best people, as employees feel that companies that have the Investors In People recognition will provide them the training needed, so therefore they will be motivated to carry on with the job. And also allows companies to retain the best people .I believe this because when employees receive the sufficient training they then have the confident to carry on with the job. By looking at this information I could see that if Beeches apply for the Investors In People Award they are more likely to attract the best employees to work for them. With attracting the best employees I feel that Beeches will also be able to attract the customers, because if the best employees offer the customer the best service then employees are more likely to visit the clinic, which shows me that Beeches will be able to meet their overall business aim and objectives.

Fujitsu service
Fujitsu service is a company that designs, builds and operates IT systems and services for a variety of customers. They received the Investors In People initiative in 1992 and were convinced that the Investors In People initiative has made a major contribution to its success. The statement that they have made is 'we have a proven template that can be rolled across the region which we know will sharpen up our people practise'. This shows me that when companies implement a strategy from Investors In people they then feel that they improve employees training. As this company feels this way, this shows that if Beeches, receive an Investors In People it is more likely that they will also feel that they have improved their employee skills. An initiative like this builds up companies confident and motivates them to spend more time and money on the training that they offer the customers

Sweyne Park School
Sweyne park school was created through the merger of two existing school in Raleigh. The problems that this school had were that the school experienced varying degrees of anxiety, demotivation and loss of morale during the period of transition To overcome these problems, the school implemented an training + development to create a culture where staff viewed the school as a learning community for all stakeholders In 1999 the school was awarded with the investors in people and the standard framework was used to introduce training + development tailored to match the needs and learning styles of individual members of staff. This able to match the needs of every individual members of staff and create success business, through a commitment to people at every level.

By looking at this Information I could see that as currently Beeches are having problem with the systems that they have in place at the moment so if they apply for

the Investors In People and adopt a training and development culture , they also are more likely to overcome they problems with their system. This also shows me that Investors In People is a motivation trigger, cause it motivates employers to invest in training.

Morley High School

Morley High School is located on the Southern outskirts of Leeds. The problems that this school had were with its curriculum and recruitment. The school had a high level of school exclusion and staff morale was in decline.

The schools staffing and recruitment were seen as a key issue. The school lacked formal recruitment procedures. Therefore often missed out on the pick of candidates. But by receiving the lip award, this provided them with an opportunity to implement some radical and long lashing changes.

The investors in people recruitment and selection procedures made a major improvement, as there were a marked improvement on the schools GCSE'S result. This therefore shows me that Beeches are giving the finance manager the job to recruit employees and in my primary research ,I found out that the employee undertaking this role has no experience in recruitment. So therefore it Beeches invest in investors in people award, they will receive a recruitment and selection framework, that could help them to recruit the best employees.

NCP

NCP is the parking, traffic and support management service. The problem that this business had was it's management as it changed it's owner, in 2005 the company received the investors in people recognition which made a major improvement in skill level: Improved motivation and people progression. And feel that "It has made us better leaders and managers and helped us to build a more motivated +stable workforce.

Currently at Beeches, they had a motivated workforce, as most of the employees had been working therefore a long a time. But this case study shows me that if Beeches invest in Investors in people award they will be able to provide their training that will motivate every employees, when every employees is motivated, Beeches will be able to create a motivated workforce. And a motivated workforce is a happy workforce.

Komatsu UK

Komatsu UK ltd is a key subsidiary of komatsu ltd in Japan, the world's second largest manufacturer of construction equipment. Komatsu UK was one the first organisation ever to be recognised as an investors in people back in 1991.

This company sestet "we the assessments not only into benchmark our performance but as multination to keep everything on track. This shows me that as companies see an incentive that could be on their way, this therefore keeps then motivated to keep everything on track. Therefore if Beeches decide to invest in this initiative they will be able to keep their training other achieved on track.

The company also feels that the investors in people assessment has become an accepted part of ensuring that we are heading in the right direction because if there's something that needs to improve, we want to know about it sooner rather than later so this therefore shows me that if Beeches invest investors in people recognition they also will be able to head in the right direction because if there is something improving they will be able to active upon this sooner. This will then also allow Beeches to work towards the right direction. It also feels that high level of employees' retention

demonstrates that people enjoy working here. This highlights to me if Beeches develops a training program and gives employees want they need, therefore high level of employee retention demonstrates that employees will therefore enjoy working.

Base connection

Base connection is a marketing service company. The company has been recognised as an investor in people for ten of its twelve trading years. Bases high priority is achieving recommendation. They believe say that "our customers will not recommend us if do not give them what they are looking for and more". This shows me that if Beeches have an investors in people initiative they then will be able to improve their customer service, which means that if Beeches customers are happy with what they are receiving they then will recommend them to others, which means that they could also increase their customers base. They also say that because we follow the standard the staff are clear about the company aims what they need to do to ensure we achieve them". This shows me that if Beeches follow investors in people standards, their staff will also be clear of their aims, as they already are not aware of them. This will also show the staff that the employers care about them, therefore are giving them this information.

Conclusion

In conclusion I think that the Investors In People Award will help Beeches to attract to the best employees and will help to keep their employees on for a longer time. And as the Investors In People have a comprehensive framework and structure, this will therefore help Beeches to attract the best employees to work for them as they feel that will receive training. And if the employees at Beeches are motivated they will work hard, which means that they will be able attract the lot of customers, which will help to increase customer base.

Customers will recommend Beeches to other customers if they are happy in what they have received, so therefore the Investors In People will help be able help Beeches once again to increase customers base. Investors In People also will motivate Beeches to work harder on providing the employees with the training needed.

Appraisals/ Performance Review

Appraisals/ Performance Reviews are used by businesses to set targets for employees within the business. Appraisals are where both the employees and the managers agree targets for the future and performance reviews are when a manager meets an employee to discuss how well employees have completed their work and whether improvements can be made. The companies that I have researched into and found are undertaking Appraisals/ performance reviews are:

- Belle Vue Girls' School
- Devonshire hotel & restaurant

Belle Vue Girls' School

Belle Vue Girls' School is a school that undertakes performance review to see what their employees are doing and what they can do to improve their performance. In their performance review the team leader conducts this performance review with their employee.

By looking at their performance review, I can see that the team leader sets objectives for the employee. But then at a further date looks at whether the objectives have been met or not, if the objective is not met, on the performance review there is another

section that is named as 'further development' where the team leader & the employee could discuss what they can do in order to meet the objective. This shows me that once an objective is set, they should be met even though the employee has to take another route to meet the objective. As the objectives are met this then motivates the employees to work harder.

In this performance management, the team leader also looks at the particular strengths that the employee has, this shows me that with being aware of these strengths the team leader will be able to see where improvements are needed, so that the team leader could set objectives connected with these improvements needed.

The areas in which the employees need to be developed in also is included with this performance review, this shows me by having this included, businesses like Beeches could see what needs to be developed in order to be successful.

Belle Vue Girls' School also discusses about the resources that will be needed to be provided by the school in the performance review. This shows me that if companies like Beeches do this, then this shows employees that this performance review is taken seriously, as the employers are spending money to provide the necessary resources needed to develop skills, this can be used as a factor to motivate employees.

At the end of this performance review both the employee and the team leader sign the form to say that they have agreed to al that is listed within the performance. This is like evidence that is used to say that a contract is made.

By analysing the information above I have found out that appraisals are great way that Beeches could use to motivate their employees. I therefore feel that I should recommend Beeches to conduct staff appraisals, as this will help them to motivate their self. As when Beeches conduct staff appraisals, this informs the employees that they are cared about. I therefore feel that by implementing staff appraisals Beeches will be able to give the employees the motivation to work harder and produce productive work.

Devonshire hotels & Restaurants

Devonshire hotels & Restaurants also undertakes performance review, to see what their employees are doing and what they can do to improve their performance. The way that Devonshire do this is by using a rating system. Which is used from 1-6 rating system.

Within their performance review they look at the key area of responsibility, which are safety, team, customer champe, sales and profit. As these are the key responsibilities therefore look at these first to see how they could even improve these.

They then go to talk about what the employees enjoys doing the success that they have had and the difficulties that they faced. This then shows the employees that the employers care about them therefore want to know, by this employee's could become motivated.

Within the performance review, the manager also looks at the whether the key responsibilities have been met satisfactorily if not what resources the company's could provide them for in order for them to meet the key responsibilities. This then motivates the employees, as the manager is willing to pay for the resources that are needed, this also shows that they really care about them and appreciate them.

In the performance review the employee then informs the manager what they should start, stop, continue to do. This also motivates the employee as the employee feels that they do have a right within the business.

By looking at the information above I feel that Beeches will be able to meet their overall business aims and objectives, if they conduct performance reviews. As when

the mangers see whether or not the employees have met the objectives, this is therefore I believe could be used to motivate the staff at Beeches. And also as it is a formal one to one interview this therefore is also encourages the employees to work as they feel that they are privileged and favoured.

Conclusion
In conclusion I have found out that appraisals are a big drive that motivate employees to work hard. I therefore feel that within the Beeches training strategy that I implement I should include this within it, as this will motivate the employees. And as the employees are motivated, this will then help Beeches to be successful as they will be able to attract more customers, which will help them meet their aims and objectives. And as their customer base increases, they will be able to increase their sales level. I found out that as companies ask their employees whether or not they need other materials so that they can then produce satisfactorily. I believe that I should also do this, to allow the employees of Beeches to be motivated.

Learning Skills Council
Learning and skills council is the government of England who are responsible for giving money and planning of education and training for people over 16 years. The following companies below benefited from Learning and skills council. These competitors are:
- Newquay Zoo
- Apex Radio systems
- Owens Global Logistics
- Toyoda Gasei Fluid System

Newquay Zoo
Newquay Zoo is one of the country's top zoos. This has always been focused on its people, meaning that they provided their staff with all the relevant training. But when Paignton Zoo bought them in 2003, which held an Investors In People status, they were keen for Newquay zoo to be equally focused on employee development. For in order to meet this problem Newquay heard about an employer training undertakes by Learning and skills council, this gives the company the benefit to train and develop their staff, on site, for free.

Alongside with this they also worked with their training provider to develop a learning package that were tailored to their needs. The training costs were paid and also received wage compensation for the time that they spent away. This shows me that as the employers pay for the training that is provided for them, this therefore motivates employees to do more.

With having received this training 17 employees have had training through the scheme.

Having received this training, the company have benefited from this as employees are more focused on their roles and also have learnt new skills and are therefore motivated and committed to their jobs, and productivity has gone up.

By looking at this, this shows me that if companies like Beeches went & benefited from Learning and skills council. This will also allow their employees to be more focused on their roles as currently the receptionists are not focused on their roles, as when they turnover, they do not know what they are doing. Learning and skills council provides companies with the motivation that is needed for them to committed

40

to their job through employer training. By applying for the train to gain the employees of Beeches are more likely to be committed to their job, role, which will help them do their job role satisfactorily, which result to Beeches meeting their overall aims and objectives.

Apex Radio systems

Apex Radio systems, specialise in the hire and sale of two-ways communication equipments to the retail, leisure and construction industries. The problem that this company had was to train their staff and enhance their professional skills. And to improve their services and customer care.

To overcome this they signed up with the employer-training pilot they were able to get straightforward advice on the training that was needed. This shows me that. As the learning skills council gives advice on the training. So therefore companies like Beeches will then be able to save cost on seeing which training they could benefit from. After going to these courses three of their employees completed NVQ in information technology, which covered broad bases of skills including e-mail distribution etc.

Having been signed up with this scheme, Apex Radio systems trained their employees in areas specific to their company, helped their employees develop new skills and reach their full potential and also improve the services the company offers and enhance their customer care.

This shows me that if companies like Beeches signed up to this scheme, they also will be able improve their customer service skills as they currently lack customer services skills, which then means in the long run they could attract more customers.

This company customer service manager quoted 'through programmes like this, staff can reach their potential and organisation can expand to offer a wider range of services to their customers.

Owens Global Logistics

Owens Global Logistics is an international fright consolidation company. This company's managing director quoted that 'good training makes for good people and good profit'. This shows me that if companies like Beeches provide their employees the training required then it will be likely that the money and time that they spend on training could result to good people; meaning well trained employees and good profit.

The problem that this company has was that they need a workforce that was confident in what they were doing and the problem that they had was that 'to be competitive you must have the best people around you'.

They then invested in training where they signed up for the employer-training pilot. It wasn't a huge investment as wage compensation etc was included.

After being with this scheme 5 of the staff were trained to NVQ with a special emphasis on customer care.

The programme has, helped an impact on productivity, helped boost the company's annual turnover, and helped his employees acquire new qualifications, which will stay with them for life. By looking at the results that they gained I could see that by participating in this scheme, which did not cost the business anything, the company improved its annual turnover.

This shows me that that as companies provide their employees with the training this then shows them how much they are appreciated by the company. This then motivates the employees. Motivation is a key drive that allows employees to work hard. As by reading the Beeches case study I could see that there is lack of

motivation in Beeches so therefore if Beeches provide training to motivate their employees, they will have the inspiration to work hard.

Toyoda Gosei Fluid Systems
Toyoda Gosei Fluid Systems is a company that are the leading manufacturers of automotive fluid handling systems. This companies Human Resources manager quoted ''the fact that we receive funding in compensation for time spent by employees doing training, coupled with individuals benefiting from better skills within the workplace, makes it a win-win scenario for employers and employee alike'. This shows me that that if funding for training is received as compensation, then both employees and the employers benefit from this, as the employees have the skills to do the certain job. And as the employees complete their jobs satisfactorily, this benefits the employers because they become successful and receive large amount of profits. If Beeches apply for the funding from Learning Skills Council they are likely to beneficial.

By looking at the news updates on the learning skills council I could see that politicians are backing employee training for Yorkshire and the Humber. So therefore I believe as the politicians are backing this scheme up, this therefore shows me that there will be a likely chance that Beeches will be able to receive this award to.
The politicians committed that successful businesses are those with a skilled workforce and increasingly. I therefore believe that If Beeches implement to the train and gain they are more likely to be very successful .So therefore this means that Beeches train their staff, they are likely to be successful than before.
Yorkshire and Humber are winning in the in terms of having the most skilled workforces, as 75% of young people are in education or training the highest figure. This shows me that the train to gain system is a really good system as it is beneficial to all the population living in Yorkshire and Humber. Therefore I believe that Beeches will be able to have skilled workforce through learning skills council.

The learning skills council news update all informed me that 22,000 employers have signed up for the free skills brokerage, even though they currently did not provide training already. The free skills brokerage offers tailored impartial, independent advice of training sourcing training providers and funding to suit individual business needs. This shows me that If Beeches apply for this service they will be able to train their employees to the needs that they need so that the training that the employees receive is beneficial.

Task 5

Below I will be looking at the training needs that the chosen departments have and what training programme I could provide them so that they could carry out their job roles effectively so as to meet the aims and objectives of the organisation.
The chosen departments that I am looking in are:
* Finance department
* Administration department

Finance department
Below I have created an outline-training programme for the Finance department.

Training Need	Training Method	Training Programme	Duration	Provider	Cost
Health & Safety (use of computers)	On-the-job	Watch Health & Safety DVD	1-2 hours	Safety Media	£149,00
Customer Service	Off-the -job	External course to Shipley College course leading to NVQ in customer service (level 2)	1 year	Shipley College	£750 per employee
Create & Maintain website	On-the-job	Job shadowing Paul	Twice a week for 6 weeks	Paul + ICT developer	N/A
Computerised Accounts Package	Off-the -job	External course Sage training course	4 days	Sage	£780
Recruitment Training	On-the-job	Internal course with Sally	1 day	Sally	N/A

Aims & Objectives of the Training Programme
The aims and the objectives of this training programme are:
* **Help employees take on a new job role-** the employees for this job role have to do various tasks that they have never done so by giving them the training they will be able to do the job with confidence and subsequently have the motivation to do well with the work. By setting this objective I will allow the employees at Beeches to work to their potential, as they will have the motivation to do so. By providing them with the training they need these can then help them to settle in to the new job role much quickly and easily. This could also motivate them; motivation is a key issue that could help employees takes on a new job role.
* **Improve job performance and motivation-**by providing the employees with the relevant training need to take on their new job, employees could be motivated and could also improve their performance. Motivating an employee makes an employee confident in terms that Beeches care about them. Motivation is key that makes the employees feel secure about the fact that they are doing the job properly. By motivating the employees the employees then could decide to work in Beeches for a longer period of time, which means that Beeches could have low staff turnover, which means that Beeches could then

save cost on employing to new employees to work for them. And could also therefore create a good image for the customers and local government.

- **To create a more flexible workforce-**by providing other employees with training that others need, then all the employees will be able to undertake other job role. For example by providing Brenda with customer service training she also will be able to undertake the receptionist job role. The way Beeches could benefit from this when is when an employee is absent from their job, it is important if other employees are already trained and have the skills and the experience to carry out the job then this way Beeches does not have to disappoint customers or allow work to build up while they are off. Flexible workforce could also be beneficial to Beeches when Beeches are busy at its key seasons; therefore if employees are trained in more than one area of the business they then can be more flexible as other employees are able to work. For example if Brenda job shadows Paul and then if Brenda is off work then it could be likely that Paul could do the maintains of the website, whilst she is off as he has the skills

- **To help introduce new technology-**by providing the finance department with the training of account packages, this will help the finance department to introduce new technology. And also by introducing new technology it could mean that the employees in the finance department could do their job easily and confidently as with technology it is easier to work then working paper base. By implementing this objective I believe that Beeches will be able to meet their overall corporate aims and objectives.

Outline of the workshops

Health & Safety (use of computers) I have decided to train the employees by purchasing a Health & Safety (use of computers) DVD, which the employee could watch at their own pace and when they want. But to get the best on the DVD I advice Sally and Brian to allow Brenda to watch the whole of the DVD at once, which will take about 1-2 hours. The DVD pack is about Health & Safety for computer operators, it includes 20 Health & Safety training booklet and 50 assessment forms, which Brenda could use to test her self. I advice that this should be done under exam conditions, so that the owner could actually be aware of the knowledge that she has learned from this. As this could help to motivate Brenda to take the training seriously. The cost of this DVD package is £149.00, but as the employees in the administration department also needs this training, they also could use the same DVD after her, this way Beeches will be able to save money as they will not have pay a large amount many times if they require to send all the employees on this training in the future. This DVD also includes vital information on laptop and computer usage and how to correctly set up a workstation, which means that apart from watching in on the TV, they could learn by computer base, as they will have the facility to do so.

For the training need Customer Service I have decided to send the employees in the finance department to Shipley College for a NVQ in customer service by the OCR exam board. NVQ's in customer service are work related qualifications. These are for people whose work involves some aspect of customer's service. And as the employees in this department will deal with customers I feel that this course will provide them the skills that they need. I have decided to send them to a level 2 course and from there they could progress. The course will be for 1 year and the employees

will be required to go to the college for 3 hours an evening on a Thursday every week. This course in flexible so therefore the employees could start when they want, as this course does not only start in September. The benefit of this qualification is that an employer can recognise and reflect a candidate's work. It also recognises the candidate's competence and ability in their every day work. Apart from going to Shipley college the employees could also do this by registering with and OCR approved centre.

The units that the employee has to cover when doing a NVQ in customer service are:

- Give customers a positive impression of yourself and your organisation
- Deliver reliable customer service
- Develop customer relationships
- Resolve customer's service problems.

The level 2 NVQ is aimed at individuals who have to deliver a continually improving service to the customers. This NVQ is to help employers and employees to achieve and demonstrate total quality as of a continuous customers service improvement programme.

The NVQ's have a flexible structure, which allows the candidates to gain recognitions for skills required in their job role. They assess knowledge and understanding but also measure a candidates performance in the real work environment, which means that the Beeches have to be work base that they can be assessed from, so therefore by being a work base then this will not cost Sally and Brian any thing, Otherwise it costs about £240 if the college provide the work base. But it will cost them a total of £750 for all the exams and the assessors and for the cost it self. This means that it will cost Beeches £750 per employee and as they have employees in the administration department also. I therefore advice Beeches to get a fund from the Learning Skills Council through their local Business link. As it is a possibility that they could receive a fund if they apply.

For the training need Create & Maintain website, I have decided that as Paul has excellent skills in Creating & Maintaining a website, therefore Brenda could job shadow Paul to get training in Creating & Maintaining a website rather than being send on an external course. I have decided that she could job shadow Paul twice a week for 8 weeks so that this way Brenda could get her jobs done and also get trained at the same time and also Paul could do his job role and train Brenda in Creating & Maintaining a website. As it is on the job it will not cost Beeches any thing expect time.

During job shadowing Paul, Brenda could learn all the skills that are needed required to create and maintain the website. I advice Paul to go through the whole tasks step by step, so that it becomes easier for her to understand what she is doing and easy for her to follow. She will also be working with the ICT provider to gain extra skills and experience for the job.

For the training need Computerised Accounts Package, I have decided to send Brenda on a training course that is designed by Sage, as she will be using a sage accounts package. The training course will be for 4 days and will be located in Leeds, as she easily could get Leeds than Bristol It is placed at:

Sage UK limited
Palladia
2nd Floor

1 City Square
Leeds
LS1 2ES

The cost of this training will be £195 per day. Which means that the total cost will be £780. The course that she will be sent on is a classroom training-instant account courses. The first day will be about introduction to book keeping the course will explain everything about basic double-entry book keeping, debit and credit, the nominal ledger and the trail balance of the key topics. The course content is: Introduction to categories, theory, basic postings and trail balance, vat recording, the sales ledger, the purchase ledger, management reports and computer base training. The course for another three days. The first day of the three days the course explains everything you need to know about setting up your Sage Instant Accounts program. Creating accounts, entering opening balances and data security are some of the key topics covered. The content here of the course is: Introduction and Navigation, Settings and Defaults, Setting up Nominal Records, Dealing with the Chart of Accounts, Creating Customer and Supplier Records, Entering Customer and Supplier Opening Balances, Entering Nominal Opening Balances, Setting Access Rights. On the second day the course will explain everything you need to know about the basic operation of your Sage Instant Accounts program. Entering journals, error correction and generating product invoices are some of the key topics covered. The course content of this day is: Journal entries and bank transactions, operating the purchase ledger, Operating the sales ledger, Data Maintenance, Using Error Corrections, Creating products, Creating product invoices and stock control.

The final day of the course will explain everything you need to know about period ends and credit control. Bank reconciliation, recurring entries and key performance indicators are some of the key topics covered. The course content on this day will be Performing Credit Control, Recurring Entries, Bank Reconciliation, Financial Reporting, Vat, Year End, Graphs and MS Office Integration and Using Instant Accounts Plus Dashboards.

After this for day training Brenda will get a good understanding in the way that she could use the account package. By doing this Brenda will allow Beeches to meet their departmental objective 'to help introduce technology'.

For the training need Recruitment Training, I have decided that for this training Brenda should be on an internal course with Sally the owner this is as Sally has the relevant skills needed in recruitment as Brenda will be working along side Sally, I therefore think that for the first few times that they recruit employees Brenda could see what Sally is doing and could work along side with her and then after this then it is likely that Brenda will have a rough idea of what needs doing. This way Brenda will be trained in how to recruit employees and what issues need to be considered.

Justification of training programmes
I have decided to purchase the health & safety use of computer DVD package rather than sending the employees to an external course is because if I decided to send the employee on an external course, then this will mean that Beeches will have a time constraint and money constraint. Time this is because if the employee was sent on the external course that then would mean that there will nobody there to undertake Brenda job, which will mean that this will mean that whilst Brenda is on the course, Beeches will have to pay her wage, but will not benefit as she will not be doing her job.

4

Money is a constraint; this is because as other members in the business also need this training, so therefore if all of the employees were sent on the external course, this then would have meant that Beeches would then have to pay more for those employees. Therefore by purchasing a DVD package this will work out cheaper for Beeches. And also if Brenda were sent to a 1-day course it would be likely that she can forget what she learnt in the 1 day, therefore this wouldn't be beneficial. But by buying the DVD package, if the employees didn't understand any thing or are unsure this way they could refer back to the sources this way of training will be value for money. Brenda could not get this training on the job; this was because none of the employees working at Beeches has any training or skills relating to Health & Safety on use of computers. Also as the employees can use this on the computers, this means that Beeches can benefit from computer based training. Also by using this source I believe that the employees will pay more attention on the audio and the visual information, than reading a book that contains information about use of computers. As images on the DVD can be attractive so therefore allow the employee to remember them. And as psychological highlight that humans remember images more than words. As the DVD is visual and has images therefore it is likely that the employees will remember the information learnt more easily. As on the DVD there will more images this will then help the employees remember want they have learnt.
And as the DVD contains assessment forms this means that this way the employees will be able to test their knowledge when they want to, but by sending them on an external course, they do not have this benefit of testing their knowledge.

I have decided to send Brenda to Shipley College for a NVQ in customers' service level 2 course where they could later develop to a level 3. I decided to do this rather than sending them on an external course on customer service was because the employees suggested that they want to have training that leads to a qualification, so I felt that by sending the employees to a college course for doing NVQ in customers service, this way they will be able to develop their skills and also will be able to get a qualification. As by sending them on a course that leads to a qualification, will motivate the employees, as they are willing to do this. It will motivate the employees, as Beeches will be meeting the employees' needs. And as the employees are motivated, they are likely to improve the quality of the customer service that they provide the customers. By the employees providing quality service to the customers, this then could mean that Beeches could meet their overall corporate aims that is 'To increase their customer base by a further 7% during the year'. And also 'To offer excellent customer service'. And also will be meeting their short-term objective 'to plan customer service training for front of office staff within the next six moths. Once again Brenda could not get this training on the job, this was because none of the employees working at Beeches had any training in customers service and those that have it had limited. Training will need commitment.

I decided to let Brenda get her skills from Paul, by job shadowing him to get training on creating and maintaining a website. This was because I felt that if an employee with the company has excellent training on a specific task, therefore others can learn from this employees as by this way Beeches will be able to save both money and time that they would have spent planning and finding place that she could go for training on.

This way as Brenda knows Paul and is familiar with him, she will then therefore feel confident in learning from him than somebody that she didn't know. And also with this training programme Brenda could also work at her normal pace and if later she still doesn't understand any thing, this way she then could refer back to Paul without any hesitation.

By having this training programme when Brenda has the required skills to maintain the website, then the finance department will be meeting the overall Beeches corporate objective 'to set up their own website by the end of the year'. This objective will be met. By reading the case study I have found out that Sally & Brian have decided that Brenda will closely liaison with the external ICT developer who designs the website and training so that she is able to maintain the website, this Brenda will be getting double training from to experts, I therefore believe that Brenda will be able to learn quickly.

I have decided to send Brenda on an external course to a sage training course for training on a computerised Accounts package, this is because as she will be using a Sage Accounts package I therefore felt that if she was sent on this training course that is designed by Sage then Brenda will benefit a lot from this because this way she will get training that is applied to software that she will be using. Because if she was sent on a different account package training, then she will have to apply her training to the Sage accounts package, whereas by receiving training from the sage training centre, Brenda will not have to go through the hassle of applying her teaching to the Sage account package.

Brenda could not get this training on the job; this was because none of the employees working at Beeches have any skills or qualities on using a computerised accounts package.

Sage will be able to provide Brenda the training that no other training course could provide, but this course is relatively expensive. I believe that as this course will be beneficial to the finance department, therefore the owner of Beeches should gather finance as in the long run, this then could be beneficial to Beeches financially, as Brenda will be able to produce more work than before. Short term financial strain but in support of long-term goals.

And as Brenda has never used this Accounts package before then by receiving the training from the designers of the package, Brenda will be able to learn the shortcuts to the package, which means that Brenda could use the package more easily. Sage training will give Brenda lots of confident as she will be able to discover how easy or hard it will be for her to use the package.

As part of her new job role Brenda has to recruit staff, but has no training in doing this so I felt that to allow the finance department to carry out the job role properly they should receive some kind on training. I therefore felt that the Brenda should go on an internal course at Beeches with Sally; this is because Sally currently recruited employees and has the required skills. I felt that by providing Brenda with an internal course once again both Brenda and the owners of Beeches could benefit from this. Brenda can benefit from this as she could feel at ease from learning from those that she knows and Beeches can benefit from this as they could save costs on sending the employees on an external when they have the skills in house.

I also felt that if I sent Brenda on a external course, Brenda will not be able to see the recruitment in action, whereas on internal course Brenda could see it in action, when Sally the owner recruits staff.

6

Administration Department

Below I have created an outline-training programme for the Administration department.

Training Need	Training Method	Training Programme	Duration	Provider	Cost
Customer Service (all staff)	Off-the -job	Shipley College course leading to NVQ in customer service (level 2)	1 year	Shipley College	£750 per employee
Data Protection Act (Sultana only)	Off-the -job	E-learning course on Data Protection Act	1 day	Academy Internet	unknown
Health & Safety (use of computers	On -the -job	Watch Health & Safety DVD	1-2 days	Safety Media	Continued from finance department
Computerised payment system (All staff)	On-the -job	Provider will come in to show	1 day	Hardware provider	Adsorbed within the hardware cost
Management information system (All Staff)	On-the -job	Provider will come in to show	1 day	Hardware provider	Adsorbed within the hardware cost
Product Knowledge (receptionist)	On -the -job	Internal course with Sally & Brian	Internal course with Sally	Sally and Brian	N/A
Staff Appraisals (Sultana Only)	On -the -job	Sultana job shadowing Sally	Once a week for 6 weeks	Sally	N/A
Recruitment Training	On-the-job	Internal course with Sally	Twice a week for 3 weeks	Sally	N/A

Aims & Objectives of the Training Programme

The aims and the objectives of this training programme are:

- **Help employees take on a new job role**- the employees for this job role has to do various of tasks that they have never done so by giving them the training they will be able to do the job with confident and then therefore have the motivation to do well with the work. By setting this objective I will allow the employees at Beeches to work to their potential, as they will have the motivation to do so. By providing them the training they need this can then help them to settle in to the new job role much quickly and easily. This could also motivate them; motivation is a key thing that could help employees takes on a new job role.
- **Improve job performance and motivation**-by providing the employees with the relevant training need to take on their new job, employees could be motivated and could also improve their performance. Motivating employees makes an employee confident in terms that Beeches care about then and prefer

7

the way that they are doing the job. Motivation is key that makes the employees feel secure about the fact that they are doing the job properly. By motivating the employees the employees then could decide to work in Beeches for a longer period of time, which means that Beeches could have low staff turnover, which means that Beeches could then save cost on employing to new employees to work for them. And could also therefore create a good image for the customers and local government.

* **To create a more flexible workforce**-by providing other employees with training that others need, then all the employees will be able to undertake other job role. For example by providing Brenda customer service training she also will be able to undertake the receptionist job role. The way Beeches could benefit from this when is when an employee is absent from their job, it is important if other employees are already trained and have the skills and the experience to carry out the job then this way Beeches does not have to disappoint customers or allow work to build up while they are off. Flexible workforce could also be beneficial to Beeches when Beeches are busy at its key seasons; therefore if employees are trained in more than one area of the business they then can be more flexible as other employees are able to work. For example if Sultana job shadows Sally and then if Sultana is off work then it could be likely that Sally could conduct staff appraisals, whilst she is off as he has the skills.

Outline of the workshop
For the training need Customer Service I have decided to send the employees in the finance department to Shipley College for a NVQ in customer service by the OCR exam board. NVQ's in customer service are work related qualifications. These are for people whose work involves some aspect of customer service. And as the employees in this department will deal with customers I feel that this course will provide them the skills that they need. I have decided to send them to a level 2 course and from there they could progress. The course will be for 1 year and the employees will be required to go to the college for 3 hours an evening on a Thursday every week. This course in flexible so therefore the employees could start when they want, as this course does not only start in September. The benefit of this qualification is that an employer can recognise and reflect a candidate's work. It also recognises the candidates' competence and ability in their every day work. Apart from going to Shipley college the employees could also do this by registering with and OCR approved centre.

The units that the employee has to cover when doing a NVQ in customer service are:
* Give customers a positive impression of yourself and your organisation
* Deliver reliable customer service
* Develop customer relationships
* Resolve customer service problems.

The level 2 NVQ is aimed at individuals who have to deliver a continually improving service to the customers. This NVQ is to help employers and employees to achieve and demonstrate total quality as of a continuous customers service improvement programme.

The NVQ's have a flexible structure, which allows the candidates to gain recognitions for skills required in their job role. They assess knowledge and understanding but

8

also measure a candidates performance in the real work environment, which means that the Beeches have to be work base that they can be assessed from, so therefore by being a work base then this will not cost Sally and Brian any thing, Otherwise it costs about £240 if the college provide the work base.

As the employees in the administration department will be in front of the house they then will be able to understand the what is customers service and how important it is to Beeches as a business.

For the training need on Data Protection Act I have decided to send Sultana on as E-learning course on Data Protection Act that is provided by Academy Internet. The course training course will be delivered by one of the leading technology lawyers in the UK. The content of this course is:
* When does the Act apply and what exemptions are available?
* What are data controllers' general obligations?
    - The 8 data protection principles
    - Processed fairly and lawfully
    - Obtained and used only for specified and lawful purpose
    - Adequate, relevant and not excessive
    - Accurate, and where necessary, kept up to date
    - Kept for no longer than necessary
    - Processed in accordance with the individual rights as defined
    - Kept secure
    - Transferred only to countries that offer adequate data Protection
* Enforcement and compliance
* Individual rights under the Act
* Employees/Employers
* Subject access request
* Marketing
* Passing data over
* Miscellaneous issues

The objective of the course is that it will help to minimise the risks to the business from unforeseen legal problems concerning a privacy and data protection. As they will be aware of the key issues concerning.

For the training needs Health & Safety (use of computers) I have decided to use the Health & Safety (use of computers) DVD, which the employee could watch in their own pace and when they want. But to get the best on the DVD I advice Sally and Brian to allow the Brenda to watch the whole of the DVD at once, which will take about 1-2 hours. The DVD pack is about Health & Safety for computer operators, it includes 20 Health & Safety training booklet and 50 assessment forms, which the employees could use to test her self. I advice that this should be done under exam conditions, so that the owner could actually see the amount that the employees have learned from this. As this could help to motivate the employees to take the training seriously. The cost of this DVD package is £149.00, but as the employees in the finance department also needs this training, this way Beeches will be able to save money as they will not have pay a large amount many times if they require to send all the employees on this training in the future. This DVD also includes vital information on laptop and computer usage and how to correctly set up a workstation, which means

9

that apart from watching in on the TV, they could learn by computer base, as they will have the facility to do so.

For the training needs computerised payment system I have decided that the way that the employees in the administration department could get this training is on the job. The way that this could do on the job is by the hardware providers coming in for a day to show them how to use the system, the cost of this is unknown but I believe that it may be absorbed as part of the hardware cost. This way the employees will have a great knowledge and will be motivated, as they will feel that is beneficial to them. This way if the employees still do not understand any information them they could refer to the user manuals that are provided with the computerised payment system. Employees will also become more confident and experienced at the system, the more they use the system.

For the training needs management information system I have decided that the way that the employees in the administration department could get this training is on the job. The way that this could do on the job is by the hardware providers coming in for a day to show them how to use the system, the cost of this is unknown but I believe that it may be absorbed as part of the hardware cost. This way if the employees still do not understand any information them they could refer to the user manuals that are provided with the computerised payment system.
Training the employees this way will mean that they will be getting the information straight from the providers, therefore the information will be more accurate than any other information provided by other external courses.

For the training need Product Knowledge that the receptionist need I have decided that the way that they could training or knowledge of the products that Beeches sell by internal course that is organised by Sally and Brian this is because they are the owners of Beeches they therefore know what they sell and the prices that they charge. I have decided that if Sally and Brian go through the products that sells with the receptionist for 1 day so that they then could have knowledge on the products that they sell to the customers. Or they could also grow through the basic induction programme that they have created so that the receptionist could refresh their memories or could learn more about the products and their features.

For the training need Staff Appraisals I have decided that Sultana could go on an internal course with Sally and Brian once again as she has the knowledge and past experience in staff appraisals, as they currently conducted Staff Appraisals in Beeches. The way that Sally and Brian could train Sultana could job shadow them when they are conduct staff appraisals with other members of staff. This way Both Sally and Brian will not be wasting their time in training Sultana in how to conducted Staff Appraisals as they will be able to do this when she is job shadowing them.

For the training need Recruitment Training, I have decided that for this training Sultana should also be on an internal course with Sally the owner this is as Sally has the relevant skills needed in recruitment as Brenda will be working along side with Sally, I therefore think that for the first few times that they recruit employees Sultana could also see what sally is doing and could work along side with her and than after this then it is likely that Sultana will also have a rough idea of what needs doing. This

10

way Sultana will be trained in how to recruit employees and what issues need to be considered.

Justification of training programme

I have decided to send the employees in the administration department also to Shipley College for a NVQ in customers service level 2 courses where they could later develop to a level 3. I decided to do this rather than sending them on an external course on customer service was because the employees suggested that they wanting to have training that leads to a qualification, so I felt that by sending the employees to a college course for doing NVQ in customers service, this way they will be able to develop their skills and also will be able to get a qualification. As by sending them on a course that leads to a qualification, will motivate the employees, as they are willing to do this. It will motivate the employees, as I will be meeting the employees' needs. And as the employees are motivated, they are likely to improve the quality of the customer service that they provide the customers. By the employees providing quality service to the customers, this then could mean that Beeches could meet their overall corporate aims, which is 'To increase their customer base by a further 7% during the year'. And also 'To offer excellent customer service'. And also will be meeting their short-term objective 'to plan customer service training for front of office staff within the next six moths.

Once again the employees in the administration department could not get this training on the job, this was because none of the employees working at Beeches had any training in customers service and those that have it had limited.

I have decided to send Sultana on a 1-day course to Academy Internet this was because as none of the employees working at Beeches had the relevant Data Protection Act knowledge even though this way of training Sultana would have been cheaper. This was because as this 1 day course is a really good course because it is provided by leading technology lawyers in the UK, this therefore means that as they are the leading lawyers they therefore will have the perfect and the correct knowledge this therefore means that Sultana will be able to come back with the perfect knowledge, But if Sultana was send on different course like to college course then this will not be very beneficial as she may not be able to learn a lot from them as she would at this training course.

I have decided to use the health & safety use of computer DVD package rather than sending the employees to an external course is because if I decided to send the employee on an external course, then this will mean that Beeches will have a time constraint and money constraint. Time this is because if the employee was sent on the external course that then would mean that there will nobody there to undertake their job, therefore then the owners will have to close the clinic, that could result to loss of sales. Money is a constraint; this is because as other members in the business also need this training, so therefore if all of the employees were sent on the external course, this then would have meant that Beeches would then have to pay more for those employees. Therefore by purchasing a DVD package this will work out cheaper for Beeches. And also because if the employees were sent to a 1-day course it will be likely that they will forget what she learnt in the 1 day, therefore this wouldn't be beneficial. But by buying the DVD package, if the employees didn't understand any thing or are unsure this way they could refer back to the sources this way of training will be value for money. The employees cannot get this training on the job; this was

because none of the employees working at Beeches has any training or skills relating to Health & Safety on use of computers. Also as the employees can use this on the computers, this means that Beeches can benefit from computer based training. Also by using this source I believe that the employees will pay more attention on the audio and the visual information, than reading a book that contains information about use of computers. As images on the DVD can be attractive so therefore allow the employee to remember them. As psychological humans remember images more than words. As the DVD is visual and has images therefore it is likely that the customers will be remember the information learnt more easily.

And as the DVD contains assessment forms this means that this way the employees will be able to test their knowledge when they want to, but by sending them on an external course, they do not have this benefit of testing their knowledge.

I have decided in order for the employees to get the training on computerised payment system, that they should get it by the providers of the system, I have decided this because I feel that the this way the employees will get the accurate experience in how to use the system and also how to operate it.

By this way the employees will get a taster of how easy or hard it is to use the system. This way of training will be practical, as they will be using the computers to see how it works, but if they were sent on an external course it is likely that they would have learned by just looking at how the trainer is using the system. By this way those learners that are kinaesthetic leaner, will not be able to learn anything. This way all auditory, kinaesthetic and visual learners will be to learn from this.

I have decided for the employees to get the training on management information system, they should get it by the providers of the system, I have decided this because I feel that the this way the employees will get the accurate experience in how to use the system and also how to operate it.

By this way the employees will get a taster of how easy or hard it is to use the system. This way of training will be practical, as they will be using the computers to see how it works, but if they were sent on an external course it is likely that they would have learned by just looking at how the trainer is using the system. By this way those learners that are kinaesthetic leaner, will not be able to learn anything. This way all auditory, kinaesthetic and visual learners will be to learn from this.

By getting this training the employees will successful be able to text the employees to meet their corporate objective 'to instigate a text reminder service generated through a computer program within the next three months'.

I have decided in order for the receptionist to enhance their knowledge on the products that Beeches offer to the customers for sale, that they should go on an internal course with Sally and Brian. I have decided this is because as Sally and Brian have the knowledge of the product that they sell as they are the owner this training programme will then therefore work out to cheaper. And also it is not relevant to send them on an external course this is because no other person will have greater knowledge on the products that Beeches sell apart from the owner of Beeches Sally and Brian. Therefore the best training programme that the receptionists could go to enhance their knowledge on the products that Beeches sell is by going on an internal course.

Once again for the training need Staff Appraisals I have decided that Sultana should also go on an internal cause with Sally. This was because I believed that if an employee / the owner at Beeches has the relevant skills that are need then there is no point in sending Sultana on an external course as it would be costly to send her on an external course. Whereas if Sultana in trained on the job then this way it will not cost Beeches anything apart from Time. Time could be a constraint, but I believe that they can overcome this problem by letting Sultana job Shadow Sally when she is conducting appraisals. This way only Sultana will not be able to carry out her job role for a few hours. But bearing in mind this will only be for a few weeks, therefore is a short-term constraint.

I have decided that in order for Sultana to get the experience and the knowledge needed to do her job properly, she should go on a internal course at Beeches with Sally, this is because Sally currently recruited employees and has the required skills. I felt that by providing Sultana with an internal course once again both Sultana and the owners of Beeches could benefit from this. Sultana can benefit from this as she could feel at ease from learning from those that they know and Beeches can benefit from this as they could save costs on sending the employees on an external when they have the skills in house.
I also felt that if I sent Sultana on an external course, Sultana will not be able to see the recruitment in action, whereas on internal course Sultana could see it in action, when sally the owner recruits staffs.

Training Initiatives
After implementing these changes I advice Beeches that they apply for an Investors In People award as I found out from my secondary research that many companies implement this award once they have a training programme. Now as they have they implement the change above I believe that Beeches will be able to qualify for this training.
The requirements for the Investors In People award are:
- To have a strategy for improving the performance of the organisation is clearly defined and understand- I have designed this strategy for Beeches as mentioned above
- Learning and development is planned to achieve the organisations objectives- above I have mentioned the way that they will be meeting their aims and objectives.
- Strategies for managing people are designed to promote quality of opportunity in the development of the organisations people-Beeches have identified all the employees needs and have a strategic plan that will make sure that all employees get fair amount of training.
- The capabilities mangers need to lead manage and develop people effectively are clearly defined and understood-the managers at Beeches have the relevant knowledge and skills to lead the training, as Sally the owner currently does this as part of her job.
As Beeches meet all the requirements above therefore they could apply for the award if they want to invest in this. But I advice them to apply for the award as they as this will beneficial to them, as it will show customers that they have spent money on the

13

employees. Apart from this they also will be able to attract new employees to come to work for them.

And as Sultana in the administration department will conduct the staff appraisals, this shows me that Beeches will also be implementing an Appraisals /performance review initiative in the business to motivate their employees to work to their potential, once they receive the training that they require.

Apart from implementing the above to training initiatives above, Beeches could also apply for the Learning Skills Council fund. As I have decided that Beeches should send all their employees for a NVQ in customer service, which is a level 2 course. And as the learning skills council fund level 2 course, I therefore suggest that Beeches should apply for the fund from the learning skills council through their local Business link, as it is a possibility that they could receive a fund if they apply. I have suggested this because I felt that as Beeches have to £750 for per employee, and as they have 5 employees this will cost them £6750, so I felt that if they apply for this fund they would be able to save their costs. It is even beneficial to Beeches if the Business link decide to fund for half of the total cost.

Task 6

I believe that the training and development strategy that I have developed will be a success because I believe that I have developed my training and development strategy with the needs of the employees in mind. I have designed the training package according to what skills and experience I feel the employees need in order to do the job effectively and also to motivate the employees. I have also not lost sight of the organisational aims and objectives

In order to evaluate the effectiveness of the training and development training strategy that I have implemented, I am going to prioritise which internal and external constraints, I think would have the greatest impact on the effectiveness on my training and development strategy

I will be evaluating the effectiveness of the training and development strategy by the internal and external constraints below:

- The problems associated with one off training rather than ongoing training initiatives
- Competition
- A radical change to a business's aims such as expansion causing a revision of training initiatives
- Physical resources
- Cost implications
- Legislation

The problems associated with one-off training rather than ongoing training initiatives

I believe that 'The problems associated with one-off training rather than ongoing training initiatives' has the greatest impact on the training and development strategy that I have implemented I feel this because most of the training programmes that I have mentioned within my two strategies are programmes that have a duration of 1 day. This means that the employees will be sent more on one-off training rather than ongoing training. This means that the employees will easy forget what they have learnt if they review the training that they have been to by referring to it on a regular basis, this is by applying the skills and the experience that they have learnt to the job on a regular basis.

Employees will be sent on one off training to external courses, employees like Sultana, who will be sent on Data Protection Act training. Sultana will have to make sure that she revises and reviews the training after being to the training programme, this is because if she revises and reviews the training, it is then more likely that she will easily be able to remember what she has learnt, and also uses on a regular basis when carrying out her job role. Whereas Brenda will be sent of a Sage Account Package training, which will ongoing training as it is more likely that Brenda will use the accounts package on a daily basis to build up her skills and knowledge. This will then enable training to prove effective. Which therefore means that Brenda will be able to meet the overall departmental aim 'To introduce new technology'. Therefore this shows me that if the customers are sent ongoing training they will allow Beeches to meet the ain and objectives.

But if they both decide to ignore what they have learnt from the training programme because they can not be bothered or are not motivated enough, then it is more likely

that they will forget what they learned and then therefore the money that was spent on them to go to those training programmes will go to a waste. This shows that then Beeches will then not benefit from sending Sultana and Brenda to training, as if they forget they both will not be able to use the skills in Beeches when carrying out their job role. If Beeches then decide to send the employees to a different training programme later on for the same training, if they did not learn a sufficient amount the first time, then Beeches will have to pay an extra cost.

And as all the customers working at Beeches will be sent on the customer service for year and will go this course on a weekly base, this means that as this training is on-going it is more likely that the employees will remember what they have learnt as they will be referring back to it on a regular basis, which will then allow Beeches to meet their overall corporate aim 'To offer excellent customer service' and their overall corporate objective 'To plan customer service training for front of office staff within the next six months'. May be due to poor customer service Beeches may have had many appointments missed, therefore once they customers service turns to excellent, they then may be able to meet their business corporate aim 'To reduce the number of missed appointments from 5% to 2%'.

Whereas employees like the receptionist who also will be sent on one-off training programme internally for the product, could also forget what they learnt if they do not revise and review what they have learnt already. But as they are on this training programme internally, it does not effect Beeches to much because they will not have pay for the training that they take on again, though it will be a waste of the time that take off again for the training. This then could affect Beeches, as they will have to either close down, which means that they will be their losing out on their sales. Or they could also ask someone to cover they job roles, which mean that during that month they will have to pay extra wages, as they will be paying the existing employees and the employees that have been called on cover.

To over come these problems listed above I recommend to the employees working at Beeches to revise and review what they have learnt on one-off training, so that they do not forget what they have learnt, as if they don't it is likely that they will forget.

Competition

I believe that 'competition' has the next greatest impact on the training and development strategy that I have implemented. I believe this because as currently Beeches had high staff turnover, which shows me that as Beeches did not provide their employees the required training that was needed, by reading the case study I assume that the employees went to the competitors as they offered the training to their employees. But now as Beeches will provide their employees with the required training that is needed, so that they motivate, inspire the employees to work, which I assume will be better than their competitors as Beeches are spending more time and the money on their employees.

It is likely that the competitors may not be spending too much time and money on their training because they may be relying on Beeches to train their staff properly, so that once the staff working at Beeches are properly trained in specific areas they then could attract the employees to their business by offering high salary or benefit to the employee.

If Beeches spend £780 on sending Brenda to Sage Account Package training, and then she leaves Beeches cause she is attracted by the competitors, this then would mean that Beeches will not be able to meet their finance departmental aim 'To introduce

new technology', this is because if no one knows how to use the account package this then is not effective.

If this happens then Beeches will be losing their employees and also the time and the money that they spent on training the employees. But to overcome this impact I advise Beeches to make sure that they make sure that the employees sign a contract saying that they will stay in the business for 1 year after receiving the training. But if Beeches apply for the Investors in People Award then Beeches will be recognised nationally, which then could help them to attract both employees and customers. As if Beeches attract customers they then will be able to meet their corporate aim 'to increase their customer base by further 7% during the year'.

A radical change to a business's aims such as expansion causing a revision of training initiatives

I believe that 'A radical change to a business's aims such as expansion causing a revision of training initiatives' has the next greatest impact on the training and development strategy that I have implemented. I believe this because Beeches are more likely to grow in the coming future as by reading the case study I have discovered that Beeches make a healthy profit at the end of every financial year. This therefore informs me that they may further expand in the future.

So if Beeches expands in the near future, this therefore mean that it then will be able to attract new customers which mean that Beeches customer base will increase, which will then result into Beeches meeting their corporate aim 'to increase their customer base by further 7% during the year'.

As Beeches expand it is more likely that Beeches will have to employ more people so that it can then provide quality service to its customers. In order for the new employees to provide quality service to the customers they will be needing training, therefore Beeches will have to make sure that they offer the employees the training that is needed. I believe that therefore Induction training will be vital for the new employees that start at Beeches.

Once Beeches expands it is then important that Beeches revise their training initiatives. They could start off with the staff appraisals. It is vital that staff appraisals are updated, so that the staff appraisals that Sultana conducts with the employees meet the need of the staff. Staff appraisals will continuous improvement help to motivate the employees, which will also be beneficial to Beeches as they will be able to meet their departmental aim 'To improve job performance and motivation', Apart of revising the Staff Appraisals, as currently Beeches applied for funds for the learning Skills Council, so that they can afford to pay for the NVQ's in customer service, once they have expanded Beeches could decide to invest in the train to gain system.

Physical resources

I believe that 'Physical resources' has the next greatest impact on the training and development strategy that I implemented. Beeches has all the relevant resources that are needed, as they have the computers, printers, hardware and software needed to use the DVD on the computers and also enough room for training as the building is new and is equipped with all the resources that are needed. As one of the programmes that I mentioned in the training strategy that I implemented involves the employees watching the DVD, and Beeches currently have a DVD player and TV in the premises, this therefore informs me that Beeches will not have to buy new resources in order for the employees to undertake the training. Beeches have one designated

room in the building that they use for training purposes and also for other occasions, for example when they recruit employees and also for meetings, staff performance review.

When the employees are sent of external courses, that take place outside the business, Beeches have less pressure on the physical resources that they have available.

As most of the training programmes that I have implemented with in the training and development strategy that I have developed are internal courses, as most of programmes are internal programmes, this therefore means that all the staff can not do the training at the same time, as by reading the case study I assume that Beeches is a really big business, it therefore is more likely to only have designated rooms for training. As it has designated rooms in the building this means that Beeches physically have enough space in the building in order for the employees to carry out the training at once. As these rooms is used for multipurpose, therefore this means that Beeches have to carefully plan what they are going to do and when. I believe that this impact of physical resources will only have an impact on Beeches when they decide to expand, but then again when they expend they are likely to have more space for training.

And also some of the internal training that will take place can take place at a desk. For example when Brenda show shadows Paul, she will be able to do this by sitting at a desk in front of a computer, therefore the physical resources constraint will not effect the training every much, and as when Brenda gets all the training that is needed for creating and maintaining the website, Beeches will be able to meet their business objective 'To set up and maintain their own website by the end of the year'

Cost implications

I believe that 'Cost implications' will have the next least impact on the training and development strategy that I have implemented. I believe this because Beeches currently have £7000 budget to develop the ICT in the business. Therefore from this sum Sally and Brian the owners of Beeches have for the development of ICT can use this money towards the accounts package that Brenda will be using and the training costs and could also use it for the Health and Safety DVD, and as the Health and Safety DVD could also be used by the employees in the administration department, this therefore means that Beeches will be able to save costs on the amount that they would have spend on sending the employee in the administration department to a course in Health and Safety in use of computers.

For the training NVQ in customer service Beeches apply for fund from the learning Skills Council, which mean that Beeches will not have to pay for training need either. From reading the case study I have assumed that Beeches are financially growing, so therefore they will be able pay for the training that they want their employees to undertake. As if Sally and Brain the owners of Beeches want to achieve their organisational objectives, they then therefore must be willing to pay for the training. And as I have mentioned above that Beeches do not have a cost implication, this therefore shows me that this cost implication impact will not effect Beeches in any way as they have the money to support this unless they change their mind to do so. Sally and Brian need to make to consider whether it is cost effective to shut the business for one to accommodate training like the training on the computer system. As now the 'working time directive' has changed the law of the employees working for 48 hours per week to longer if they are willing to, this therefore means that Beeches could decide to pay the employees overtime if they want to do overtime, so that during that overtime they could decide to train the staff, this then could create a

flexible workforce, which will then could help to reduce costs while someone is away from their job role, this then can be covered.

Legislation

I believe that 'Legislation' will have the least impact on the training and development strategy that I have implemented. I believe this because when training employees every business have to follow legislations so that it offers all the employees in the workplaces with equal training. Business will have to make sure that they refer to the changes in the equal opportunities legislation, which are sex discrimination, race discrimination, Equal pay, and disability discrimination. As at this moment of time all employees from any sex, race or with any disability problem is entitled to the same training.

As Beeches will be offering their employees Health & Safety training, therefore they will have to make sure that they follow the Health and Safety Act.

When the legislation change Beeches will need to make sure that they respond to them quickly. Especially if there are changes in the in the Health and Safety Act and the Data Protection Act, this is because these are the two Act that they have sent their employees on training for. Therefore someone will have to revise and review the training, so that the employees carry out the job roles are up to date and sure about what they are doing. It is important that Beeches react to the changes made in the law quickly because if employees like Brenda start to train other employees in Health and Safety that is out of date then Beeches will not be able to meet their departmental or overall business aims and objectives.

As now the 'working time directive' has changed the law of the employees working for 48 hours per week to longer if they are willing to, this means that Beeches could benefit from this by asking their employees to work longer for them, so that they then could increase their sales.

Well done

I believe you have completed a critical evaluation of your training package taking into account aims & objectives. You have made well reasoned conclusions.

A24 = 11

Appendixes

UPDATED: Departmental Self Evaluation:
The New Ofsted Framework

FOR	New, aspiring and existing HoDs in secondary schools. Line managers of HoDs in secondary schools.
WHEN	Wednesday 10 January 2007, London. Thursday 1 February 2007, Birmingham. Tuesday 24 April 2007, Manchester. Tuesday 26 June 2007, Birmingham.
TUTOR	Andrew Lagden currently works as an Ofsted Inspector – in the last five years he has inspected 60 schools. This has included whole school issues such as leadership and management, standards and the curriculum as well as subject areas such as History and Business Education. Additionally he works as a consultant in a number of initiatives, including the specialist schools, training schools and advanced skills teacher programmes and work related learning. He is also an NCSL accredited school improvement partner (SIP).

This course complements other free-standing courses on evaluating teaching and learning and Ofsted.

OBJECTIVES

- Develop knowledge about the principles of successful self evaluation in departments
- Give an overview of how to evaluate the key aspects of a department, including standards, progress, curriculum and leadership and management
- Provide information about how to monitor and evaluate teaching and learning successfully in a department
- Develop awareness of the new Ofsted (2006) framework and its implications for departments

PROGRAMME

09.30	Welcome, refreshments and registration
09.45	**Developing self evaluation in departments:** how to evaluate effectively – judgements, evidence and impact; documentation to have in place and the implications of evaluating; 'Every Child Matters' outcomes for departments
11.15	**Evaluating key aspects of the department:** a model for department self evaluation, using data to evaluate standards and progress and evaluating other key areas – curriculum, leadership and management
12.30	Lunch
13.30	**Evaluating teaching and learning in the department:** carrying out lesson observations and feeding back to colleagues effectively using the new Ofsted guidelines
15.00	**Preparing your department for inspection under the new Ofsted (2006) framework:** understanding the implications for departments, lesson observations and preparing colleagues for inspection
16.00	Close

FEE £195 including lunch, light refreshments and course materials.
No additional charge for VAT.

COURSE CODE MLADE-MW

OCR

Management Development Programme

Programme Structure

Each individual to complete 12 modules encompassing:
- 9 Core Modules
- 1 choice from section A
- 1 choice form section B
- 1 choice from section C

Module Structure

1. Pre Workshop Briefing & Activity. Usually background reading and a couple of questions to answer.

2. Delegate Work Book. To support each workshop with objectives, additional reading material, notes and further references.

3. Facilitated workshop – 3 hours (4 in some circumstances) supported with copies of slides, various activities and handouts.

4. Post Course Departmental Learning Activity. A personal action plan and case study.

5. Learning Review – 1-2 hour group session to practice skills and integrate into daily working life.

Core Modules

1. Managing Health & Safety

2. Organisational Skills
   - Time Management
   - Action Planning
   - Delegation
   - Assertiveness
   - Organising Workspace

3. Communication Skills
   - Interpersonal Skills
   - Team Briefings

4. Leadership
   - Influencing
   - Negotiating
   - Managing conflict

5. Team Building Skills
    - Motivation
    - Recognition

6. Recruitment & Selection
    - Employment Law
    - Job & Person Specifications
    - Interviewing

7. Managing Training
    - Individual & Team Development
    - Coaching

8. Appraisal Skills
    - Managing Performance
    - Feedback
    - Self Development

9. Managing Performance
    - Disciplinary & Grievance
    - Counselling Skills
    - Holding 1:1s

Optional Modules

Section A
- Managing the Customer Experience
- Problem Solving & Decision Making

Section B
- Managing Quality & Continuous Improvement
- Change Management

Section C
- Managing Information for Decision Making
- Financial Management & Report Writing

Investors in People
→ Requirements

Unlock your organisation's potential
An overview of the Standard framework

The Investors in People Standard

Principles	Indicators	Evidence requirements
An Investor in People develops effective strategies to improve the performance of the organisation through its people. Developing strategies to improve the performance of the organisation	**1 A strategy for improving the performance of the organisation is clearly defined and understood.**	1 Top managers make sure the organisation has a clear purpose and vision supported by a strategy for improving its performance.
		2 Top managers make sure the organisation has a business plan with measurable performance objectives.
		3 Top managers make sure there are constructive relationships with representative groups (where they exist) and the groups are consulted when developing the organisation's business plan.
		4 Managers can describe how they involve people when developing the organisation's business plan and when agreeing team and individual objectives.
		5 People who are members of representative groups can confirm that top managers make sure there are constructive relationships with the groups and they are consulted when developing the organisation's business plan.
		6 People can explain the objectives of their team and the organisation at a level that is appropriate to their role, and can describe how they are expected to contribute to developing and achieving them.
	2 Learning and development is planned to achieve the organisation's objectives.	1 Top managers can explain the organisation's learning and development needs, the plans and resources in place to meet them, how these link to achieving specific objectives and how the impact will be evaluated.
		2 Managers can explain team learning and development needs, the activities planned to meet them, how these link to achieving specific team objectives and how the impact will be evaluated.
		3 People can describe how they are involved in identifying their learning and development needs and the activities planned to meet them.
		4 People can explain what their learning and development activities should achieve for them, their team and the organisation.
	3 Strategies for managing people are designed to promote equality of opportunity in the development of the organisation's people.	1 Top managers can describe strategies they have in place to create an environment where everyone is encouraged to contribute ideas to improve their own and other people's performance.
		2 Top managers recognise the different needs of people and can describe strategies they have in place to make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve their performance.
		3 Managers recognise the different needs of people and can describe how they make sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for people to learn and develop which will improve their performance.
		4 People believe managers are genuinely committed to making sure everyone has appropriate and fair access to the support they need and there is equality of opportunity for them to learn and develop which will improve their performance.
		5 People can give examples of how they have been encouraged to contribute ideas to improve their own and other people's performance.
	4 The capabilities managers need to lead, manage and develop people effectively are clearly defined and understood.	1 Top managers can describe the knowledge, skills and behaviours managers need to lead, manage and develop people effectively, and the plans they have in place to make sure managers have these capabilities.
		2 Managers can describe the knowledge, skills and behaviours they need to lead, manage and develop people effectively.
		3 People can describe what their manager should be doing to lead, manage and develop them effectively.

Plain English Campaign's Crystal Mark does not apply to indicator 3.

Principles	Indicators	Evidence requirements

Taking action to improve the performance of the organisation

An Investor in People takes effective action to improve the performance of the organisation through its people.

5 Managers are effective in leading, managing and developing people.

1   Managers can explain how they are effective in leading, managing and developing people.

2   Managers can give examples of how they give people constructive feedback on their performance regularly and when appropriate.

3   People can explain how their managers are effective in leading, managing and developing them.

4   People can give examples of how they receive constructive feedback on their performance regularly and when appropriate.

6 People's contribution to the organisation is recognised and valued.

1   Managers can give examples of how they recognise and value people's individual contribution to the organisation.

2   People can describe how they contribute to the organisation and believe they make a positive difference to its performance.

3   People can describe how their contribution to the organisation is recognised and valued.

7 People are encouraged to take ownership and responsibility by being involved in decision-making.

1   Managers can describe how they promote a sense of ownership and responsibility by encouraging people to be involved in decision-making, both individually and through representative groups, where they exist.

2   People can describe how they are encouraged to be involved in decision-making that affects the performance of individuals, teams and the organisation, at a level that is appropriate to their role.

3   People can describe how they are encouraged to take ownership and responsibility for decisions that affect the performance of individuals, teams and the organisation, at a level that is appropriate to their role.

8 People learn and develop effectively.

1   Managers can describe how they make sure people's learning and development needs are met.

2   People can describe how their learning and development needs have been met, what they have learnt and how they have applied this in their role.

3   People who are new to the organisation, and those new to a role, can describe how their induction has helped them to perform effectively.

Evaluating the impact on the performance of the organisation

An Investor in People can demonstrate the impact of its investment in people on the performance of the organisation.

9 Investment in people improves the performance of the organisation.

1   Top managers can describe the organisation's overall investment of time, money and resources in learning and development.

2   Top managers can explain, and quantify where appropriate, how learning and development has improved the performance of the organisation.

3   Top managers can describe how the evaluation of their investment in people is used to develop their strategy for improving the performance of the organisation.

4   Managers can give examples of how learning and development has improved the performance of their team and the organisation.

5   People can give examples of how learning and development has improved their performance, the performance of their team and that of the organisation.

10 Improvements are continually made to the way people are managed and developed.

1   Top managers can give examples of how the evaluation of their investment in people has resulted in improvements in the organisation's strategy for managing and developing people.

2   Managers can give examples of improvements they have made to the way they manage and develop people.

3   People can give examples of improvements that have been made to the way the organisation manages and develops its people.

Glossary

Words can mean different things to different people. This glossary explains what certain words mean as they appear in the Investors in People Standard.

Business plan

This is a plan that sets out the organisation's objectives. It may also be known as an organisational plan, corporate plan, strategic plan, development plan or improvement plan.

Capabilities

These are the knowledge, skills and behaviours the organisation's leaders and managers need.

Constructive feedback

This is information provided to an individual that allows them to understand their particular strengths and their areas for improvement in relation to their performance.

Constructive relationships

This refers to positive working relationships between managers and representative groups.

Consult

This means managers and representative groups regularly examining issues of mutual concern together so that they can take account of the views of employees when making decisions that are likely to affect their interests.

Continually

This means happening often but with breaks in between each event.

Contribution

This is the ideas, time and effort that people give to an organisation to help it achieve its objectives.

Equality

This means recognising that while people are different and need to be treated as individuals, everyone is the same in terms of having equal value, equal rights as human beings and a need to be treated with dignity and respect. In terms of the opportunity to learn and develop, equality means preventing and removing discrimination because of someone's race, sex, disability, sexuality, religion or belief, age, marital status or other personal characteristics. It makes sure that all groups have appropriate and fair access to learning and development opportunities.

Evaluation

This means reviewing the results of learning and development activities and identifying whether they have achieved their intended objectives and how this has had an impact on performance.

Impact

This means the results achieved and the effect this has had on performance.

Learning and development

This is any activity that develops skills, knowledge or attitude. Activities may range from formal training courses run internally or externally to informal on-the-job training or coaching.

Manager

This is anyone who is responsible for managing or developing people. This includes top managers.

Objectives

These are the results the organisation aims for to achieve its vision. To know if the objectives have been achieved, they need to be specific, measurable and time-bound. Specific means identifying exactly what needs to be achieved. Measurable means knowing how much has been achieved (for example, 5% up, £100 more or five people more). Time-bound means setting a deadline for achieving the objectives (for example, by the end of this three-month period or within one year).

Organisation

This is the body that is working with the Investors in People Standard. It can be profit-making or non-profit-making, a charity, a subsidiary or a business unit.

Ownership

This means people playing a greater role in the success of the organisation, and being willing to own a decision and be accountable for its outcome.

People

This is anyone who helps the organisation to achieve its objectives – whatever role they play. It includes part-time workers, voluntary workers, people on renewable short-term contracts, and regular, casual employees. Where an indicator refers to 'people', it means everyone in the organisation (including managers and top managers). The only exception to this is where the assessor decides, based on evidence collected, that they will accept nearly everyone.

People who are members of representative groups

This refers to people who act as official representatives, rather than ordinary members.

Purpose

This describes why an organisation exists and what its business is. This could be expressed through a mission statement.

Quantify

This means explaining, in measurable terms, the results achieved through learning and development activities.

Regularly

This means at least once a year, but it could be more often. It is up to the organisation to define what is appropriate.

Representative groups

These are groups like trade unions, other workplace representatives, staff associations, works councils and partnership councils.

Strategy

This is the way an organisation aims to achieve its vision.

Team

This is a small or large group of people who come together to work towards a shared goal - for example, a project team, a branch or department. In small organisations, a team may be the whole organisation. As a result, where an evidence requirement refers to team, this will mean the whole organisation if there are no smaller teams.

Top managers

These are the most senior people in the organisation who are likely to be responsible for developing strategies and approving major investments. This could be the owners, the board of directors, partners or senior managers.

Vision

This describes where an organisation wants to be in the future and what it wants its people and its customers to say about it.

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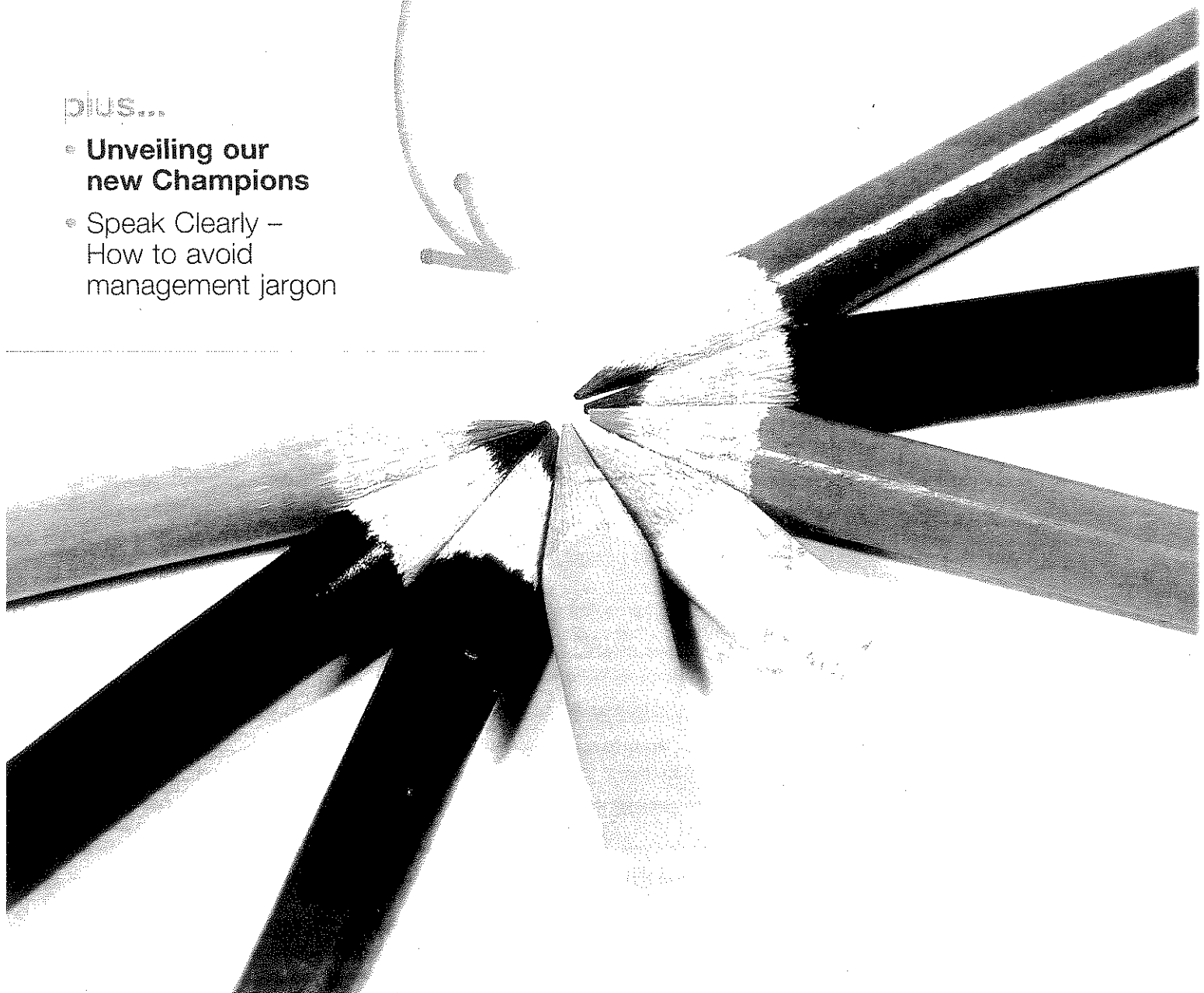Business improvement through people

Issue 18
February 2007

Encouraging
diversity

plus...

- **Unveiling our
new Champions**

- Speak Clearly –
How to avoid
management jargon

Investors in People **Champions** reach peak of achievement

Do you want to climb the heights like star of stage and screen, Brian Blessed? Then become an Investors in People Champion.

Investors in People Champions are the exemplars of Investors in People and prime advocates of its benefits. Investors in People UK was delighted to welcome its nine new Champions to the UnderGlobe of Shakespeare's Globe Theatre in London to present them with their certificates at a celebratory awards dinner held in the autumn.

The Guest Speaker who handed over the certificates in dramatic fashion was Brian Blessed, the distinguished actor whose career stretches from Z Cars and I, Claudius through to Kenneth Branagh's recent production of As You Like It. But Brian is also very well know for his mountaineering adventures which have been widely featured on television. Now in his early 70's he is still keen to reach the top of Everest and he drew parallels between the challenge of the mountains and the achievements of the Champions.

"It's an honour to be here amongst such wonderful people," he said. "I don't appear at these kinds of events unless I believe in them - and I believe in Investors in People."

Dare to dare

The theme of his inspirational address was the importance of taking risks. "The greatest danger," he said, "lies in NOT undertaking the adventure. Stop just dreaming about achieving something exceptional! Wake up and do it, the most important thing in life is 'having a go'."

Speaking on behalf of Investors in People UK, Director of Marketing and Communication, Nicola Clark commended the Champions for being "true exemplar organisations." They are embodiments of the Standard and what it enables organisations to achieve. As such, said Nicola, they are 'amongst Investors in People UK's most treasured assets."

The Champions programme had proved to be 'fabulously successful', she continued. It is one of our most proud achievements and this year there has been more applicants than ever. "We keep things simple but are very rigorous in how we select," she emphasised.

Collectively the group of thirty-three Champion organisations is very lively and embodies the wide spectrum of organisations now working successfully with Investors in People. From small, recent start-ups, to global corporations the Champions extends across both the public and private sectors. It exemplified, in real life, how being an Investor in People has something valuable to offer organisations of every possible type.

The Champion organisations are much sought after as speakers, mentors and for hosting open days. Investors in People UK deeply appreciates what they have to offer and looks forward to working with them in the years ahead.

The 2006 Investors in People Champions are:

★ **Fujitsu Services** is one of the leading European companies in the IT outsourcing market. It designs, builds and operates IT systems and services for a variety of customers and has 18,000 staff throughout 20 countries in Europe. It generates £2 billion in revenues.

Having been involved with Investors in People since 1992 it is convinced that Investors in People has made a major contribution to its success. Consequently the company has recently put in place a programme to implement the Standard across its European operation. As Ian Williams, Head of Organisation and

Fujitsu Services

People Development, comments, "We have a proven template that can be rolled across the region which we know will sharpen up our people practices."

In becoming a Champion it is particularly keen to share the work it has done with its Fujitsu Management Academy and the innovative career management tools and online systems which it has created. It is also looking forward to "Debating, challenging and learning from other Champions."

Champions success in 2006:

- **The Arena Accolade was presented to Cyrus Todiwala MBE, Café Spice Namaste in recognition of his outstanding contribution to the hospitality industry**

- **St Mary's College in Derry claimed the top prize at the European Quality Awards**

- **Philip Williamson from Nationwide was awarded the People's Champion Award by the CBI**

MerseyTravel

Morley High School

GS Contracts Joinery

Metro

GS Contracts Joinery was established in 1987 by its current Managing Director, Gary Smith, to undertake projects such as building speakers and deck consoles for nightclubs. From those early days it has expanded and progressed on to interior design, manufacturing and installation work for the commercial, leisure and catering industry. Based in Colchester, Essex it employs 41 people on projects across the UK and abroad. It first achieved recognition in 1999.

Investors in People recognition has played a major part in the successful development of the business. "Prior to gaining the Standard we were running around like headless chickens, with no procedures, policies or training in place," says Sue Smith, a Director. "We have come a long way since then. We are now a far more structured company. Customers come to us not only for our products, but because of the high quality of service they receive from our staff."

The company feels that its main contribution to the Champions programme will be to demonstrate how the Standard brings benefits to small businesses.

★ **Merseytravel,** the public sector travel organisation achieved Investors in People recognition less than three years ago, but it has seen enormous benefits as a result. In particular it has gained an improvement in staff retention with turnover now at just 4% (the best for any Passenger Transport Executive in the country). By taking a partnership approach to learning and development with the trade unions, Merseytravel has been recognised by the TUC as a best practice employer. This has been reflected in a 10 per cent drop in the number of disciplines/grievances.

"Without a doubt, we are all working more efficiently as a team and there's a better feel about the place since working with Investors in People," says Neil Scales OBE, Chief Executive, Director General, Merseytravel. "I am proud to say that over the past two years our organisation has been truly transformed."

Merseytravel hopes that its particular contribution to the Champions programme will come through promoting its innovative approach to learning and development.

★**Metro,** the newspaper publisher which has set a trend by distributing the world's largest free newspaper and the fourth biggest newspaper in the UK. Metro achieved recognition as an Investor in People organisation in April 2005. Employing 180 people in its Head Office in London and in seven other sites in the UK it developed a Talent Strategy in order to build a structure that would encourage excellence and loyalty among its people.

"We invest heavily in our talent, because we know that excellent people will create excellent products," says Steve Auckland, Managing Director, Metro, who had already successfully introduced the Standard at the Lancashire Evening Post. "I was confident that Investors in People would give us a comprehensive framework and structure, without becoming a burden. I also knew that it would give us focus, keep us on track and helping us not only to attract but also to retain the best people."

★ **Morley High School** is located on the southern outskirts of Leeds. With 1,500 students aged 11-18 and 200 staff the school was facing, at the beginning of the decade, a number of important issues around its performance, curriculum and recruitment. It had a high level of school exclusions and staff morale was in decline.

Staffing and recruitment were seen as a key issue. For example the school lacked formal recruitment procedures and, as a result, it often missed out on the pick of candidates. "It was clear that we needed to transform our approach," said John Townsley, Head Teacher. "Investors in People provided us with an opportunity to implement some radical and long lasting changes."

Using the Investors in People Recruitment and Selection Model, the school overhauled its recruitment and selection procedures and very quickly major improvements began to be seen. The curriculum was transformed leading to a marked improvement on the school's results in GCSE exams. Behaviour and attendance have also both improved dramatically.
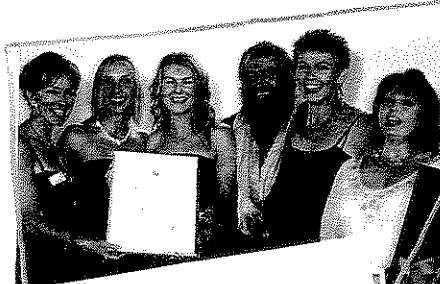
By becoming a Champion organisation the school hopes to continue its process of transformation. It is particularly keen to learn from the experiences of other, non-educational organisations.

The search for this years Champions has already started, a leaflet is enclosed with more details of how to apply.

NCP

Northbrook Technology

Sweyne Park School

SPILA

NCP, the parking, traffic and transport management services operator employs 5,800 people in more than 750 locations around the UK. Originally a property led business, NCP changed direction in May 2002 when it was acquired from its original owners. It was bought subsequently by the 3i Group in 2005 for £555 million.

In the course of these changes it underwent a major transformation of its management style largely under the influence of Investors in People. The company was recognised in 2005 and major improvements were achieved in skill levels, improved motivation and people progression. "We have gone from the 1950s to the 21st century in two years and we owe much of this achievement to the Standard," says Bob Macnaugton, Chief Executive. "It has made us better leaders and managers and helped us to build a more motivated and stable workforce."

By becoming a Champion organisation NCP wants to be continually challenged and tap into the best practice within the Champions network.

★ **Northbrook Technology** is based in Northern Ireland and is a wholly owned subsidiary of the Allstate Corporation (the biggest insurance company in the US) for which its 1,500 staff provide IT, administration and call centre services.

As a start up operation in the mid-1990's Allstate required Northbrook to expand from virtually zero to 250 employees in three years. "Because of these almost impossibly challenging growth targets, we had to come up with an innovative programme for recruitment and retention if we were to demonstrate to our parent

company that we could succeed," says Rose Kelly, Director of Human Resources. "Investors in People provided a formal, structured basis for our business practice. In doing so it helped establish our reputation as an employer and contributor to the economy of Northern Ireland."

Having first achieved Investors in People recognition in June 2000 it was only the third company in UK to implement the Work-life Balance Model. It was assessed against Profile in 2006. In becoming a Champion Northbrook Technology wants, "to learn and to keep ahead as a good employer."

Scottish Provident International Life Assurance Ltd (SPILA) an Offshore Life Assurance organisation operating from its Head Office in Douglas, Isle of Man, where it employs 150 people.

Having been first recognised as an Investor in People in 1999, the Standard has been vital to maintaining the motivation of staff through a period of rapid and profound change and a series of takeovers. "It has been a unique and valuable constant," says Lillian Boyle, Managing Director.

As evidence of its commitment to Investors in People, the company is the founder and an active member of the island's Investors in People Network Group. It is unremitting in its promotion of Investors in People and uses the logo on its website, business cards and letterheads. It also has a flagpole outside the building where the first and last thing staff and visitors see each day is the Investors in People flag!

It is looking forward to the challenge of being a new Champion and sharing the ideas.

★ **Sweyne Park School** was created through the merger of two existing schools in Rayleigh, Essex. By creating a new institution of 1300 pupils and 165 staff it aimed to improve resources on one site for all the pupils in the locality.

As is often the case with school amalgamations, however, students, parents and staff alike experienced varying degrees of anxiety, demotivation and loss of morale during the period of transition.

In addressing these problems the emphasis was put on training and development to create a culture where staff viewed the school as a learning community for all stakeholders. The school became an Investor in People in 1999 and the Standard's framework was used to as the basis of introducing training and development tailored to match the needs and learning styles of individual members of staff.

"We've transformed attitudes, standards and expectations," said Sally Pemberton, Deputy Head Teacher. "This has helped us to create an institution that's outstandingly successful, through a commitment to people at every level."

By becoming a Champion the school wants to extend its horizons and get a broader perspective on organisational development through people.

Look out for Champions events! Visit www.investorsinpeoplechampions.co.uk for details of events, news and updates.

What does it mean to be an Investor in People?
Just look at these businesses to see how it is done.

Successful businesses

Investors in People is fifteen years old. By any measure its story is a great success. In an age of short-lived initiatives it has survived while the number of recognised organisations has increased year-on-year with ever growing momentum.

But, satisfying though this may be, it is far from the full story about Investors in People. In fact, it is just the outline of the story. The truth about Investors in People is to be found within the organisations who are actually applying the principles of the Standard, day-in, day-out, in order to achieve their goals.

So to get a real insight into the significance of being an Investor in People we put the focus on three organisations, with varied lengths of experience, who embody the values of the Standard every day they go to work.

Komatsu UK
Committed from the beginning

Komatsu UK Ltd is a key subsidiary of Komatsu Ltd in Japan, the world's second largest manufacturer of construction equipment. Based in the North-east of England it employs seven hundred people. It was one of the first organisations ever to be recognised as an Investor in People back in 1991.

"Komatsu UK shares the fundamental philosophy of Investors in People that our people are crucial to the success of the business," says Tracey Wilson, Human Resources Manager. "With a Japanese parent company, respect for the individual is a core belief of the business and one we put into practice in our training and communication; it's a central part of our success."

Such is the level of its commitment that Komatsu puts itself through assessment every year and genuinely relishes and benefits from the challenge.

"We look at the Investors in People Standard as a genuine investment in our people and the business, which is why we choose to be reassessed every year," explains Tracey Wilson, Human Resources Manager at the Tyneside manufacturing facility. "We use the

assessments not only to benchmark our performance but as motivation to keep everything on track. The annual assessment has become an accepted part of ensuring that we are heading in the right direction because if there's something that needs to improve, we want to know about it sooner rather than later."

Everyone who works for Komatsu has a regular appraisal to look at their progress and identify scope for skills development. The company also devotes time to updating everyone on the progress of the UK operation so that people understand how the business is doing overall. For example, twenty-five minute presentations are given each month in order to highlight the performance of each area of the company. And annually the Managing Director gives a series of presentations to explain the company's performance over the previous year and to pinpoint future targets.

"Achieving the Investors in People Standard is a reflection of our belief in our people," says Tracey, "while the high level of employee retention demonstrates that people enjoy working here."

Base Connections
Recognised for more

Base Connections is a marketing services company and takes pride in the fact that it has been continuously recognised as an Investor in People for ten of its twelve trading years.

"In order for a Company to sustain itself in an ever-increasingly competitive market it is essential that workforce training, development and motivation are all subject to continuous monitoring," says Sue Sowerby, Director of Corporate Services at Base Connections. "Investors in People encourages this continuous evaluation and planning."

Achieving customer recommendation is a high priority for Base. "Our customers will not recommend us if we do not give them what they are looking for and more," says Sue. "Our workforce give its best, we believe, because of our system of personal development programs, incentives, 'thank you's' and by embracing the philosophy of self direction. Because we follow the Investors in People Standard the staff are clear about the Company aims and what they need to do to ensure we achieve them."

Base employs a wide range of people aged from 18 – 80 (!) both full time and part time and including both those who

make Investors in People a winning formula

ian a decade

are highly ambitious and those who are enjoy the comfort of routine. The company's approach to each person's development means/that individuals get to where they want while Base Connections benefits by getting the best from them. "Personal development programmes mean that every person who walks through our door can be assured that we will facilitate their progress to achieve whatever they are aiming for within the Company."

Equally powerful, however, is the idea of self-direction which is increasingly having a big impact on performance. "No longer do the clients feedback solely to an Account Manager," explains Sue. "They meet with the whole team and give individual feedback on the work undertaken. This has proved immensely motivational for every member of staff who can thereby fully appreciate the value of the work they are undertaking for a particular client."

In introducing these techniques Base Connections has used Investors in People to develop its entire workforce. The results are to be seen, says Sue, in "Improved performance on a personal, team and Company level." Quite a result.

Metro
News update on the 'The Standard'

Metro describes itself as the "first urban national newspaper" and is a trail-blazer as a high quality, news-led free newspaper. It was first recognised as an Investor in People in 2005 and has also recently become an Investors in People Champion.

As a bold, entrepreneurial experiment Metro was driven initially by its processes, rather than its people. With a young, mobile staff, recruitment and retention were bound to be an ongoing challenge. However, in its early days, a lack of 'people focus' meant that Metro had enormous difficulties in holding on to its people. In fact, by 2001 employee attrition was running at 33 per cent and each sales person who left was costing Metro an estimated £91,000 in recruitment and training costs and lost sales. Editorial staff were also dissatisfied with the opportunities for their own development.

Against this backdrop Steve Auckland was appointed as managing director of Metro. As Chair of London Cares at Business in the Community which encourages personal development through voluntary community work, Auckland was keen to embrace the principles of the Standard. On his appointment he decided that a change in direction was needed urgently to address the 'people' problems faced by the paper.

"I was convinced that our autocratic management style was at the heart of the problem," says Auckland. " I wanted to turn this around and to instill a new sense

of direction in the paper, so that staff could clearly see opportunities for their future development."

The initial Investors in People assessment revealed that development was a key weakness within the editorial team. Consequently, Metro's senior editorial team undertook a seven week 'bite size' training programme. They learned how to avoid micro-management, to empower and also to develop their staff. The programme enabled them to become better managers and to facilitate cultural change on the paper. Whilst initially sceptical, the editorial management team became quickly convinced and now fully supports the Standard. This process inspired the launch of Editorial Appraisals and the refinement of an Editorial Development Scheme which recognises success and nurtures talent.

Other development initiatives include 'Quarterly Talent Brainstorms' and Quarterly Managing Director Talent lunches, both of which seek ideas for improvement. The vast majority of ideas, over 60 per cent, have been implemented as a result of these sessions.

Clearly Investors in People is now making news at Metro by helping shape change and nurture success at one of our leading popular papers.

So three stories, three sets of experience – but one conclusion. Investors in People makes organisations into the successes they want to be.

Training Initiatives.   *Seconday Research*

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Leading learning and skills

Yorkshire and the Humber > Employer's Guide to Training Providers > Employer's Guide to Training Providers

Employer's Guide to Training Providers

Introduction

Welcome to the Employer's Guide to Training Providers. Aimed at employers, the Guide helps you choose the most suitable training provider for your business and workforce needs. It provides you with questions to ask and things to consider when looking for training provision.

There is a search facility to help you find providers who offer courses on a subject of your choice.

In addition, in the South West, we are running a pilot to try out an employer feedback facility. This will help employers differentiate between training on the principle that if one employer has found a particular course useful, others are also likely to. Click here (or on the "Feedback about training" link on the left) to find out more and to enter your feedback about training you have purchased or arranged for your employees (or for yourself).

What is Good Training?
Training is good if it gives you what you need, but this can mean different things to different employers. You are the best person to decide whether a training provider is right for your business.

For example, a good training provider may be one who:

- has premises that learners can get to easily
- achieves high pass rates
- has trainers with recent experience of a particular industry
- is good at getting younger or older learners interested and motivated, so that they complete their courses
- can provide training at the workplace rather than the trainer's premises

Some of these tests for checking the quality of trainers are covered by the inspections carried out by the ALI and Ofsted. You may find it helpful to check out the inspection results for a provider you have chosen.

In this Guide we have set out the sort of questions you can ask a provider (and some to ask yourself). This will help you find out which training provider best suits your requirements.
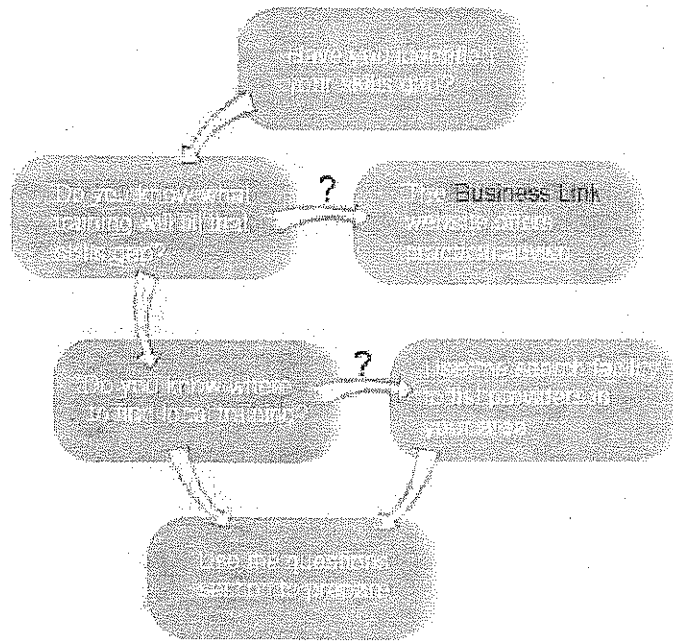
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Leading learning and skills

Yorkshire and the Humber > Employer's Guide to Training Providers > Funding > Funding

Funding

For some types of training where the Government has identified a priority sector or skills gap, public funding may be available.

Contact your local Business Link for information in your area on:

- Key Skills (Skills for Life) training
- Level 2 / 3 entitlement
- Apprenticeships
- Employer Training Pilots
- Leadership & management programmes
- Investors in People programme

Business link contacts details:

Business Link Gloucestershire
Chargrove House
Main Road
Shurdington
Cheltenham
Gloucestershire

01242 863863
info@glos.businesslink.co.uk

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Leading learning and skills

Yorkshire and the Humber > Employer's Guide to Training Providers > Useful links > Useful Links

Useful Links

Many organisations can offer information and or advice about training needs.

1. British Chamber of Commerce (BCC)
   The British Chambers of Commerce represents the interests of over 135,000 businesses from across the UK. Local and national chambers provide business oriented training and information.
2. Investors in People UK
   Investors in People (IiP) is an accreditation scheme for well managed organisations. It is aimed at boosting productivity, profitability, customer service, and staff motivation by creating a climate of 'continuous improvement'.
3. Learndirect-Business
   Learndirect business offers online learning solutions for organisations of all types and sizes. Because the courses are delivered on-line, you/your employee can work through them at a time and pace to suit you
4. Sector Skills Councils (SSCs)
   Sector Skills Councils (SSCs) aim to tackle the skills and productivity needs of different industry and business sectors which are economically or strategically significance.
5. Trade associations and representative bodies
   Trade associations are formed from a membership of companies operating in a particular area of industry and exist for their benefit.

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>lsc

Leading learning and skills

Home > What we do > Employer > Train to Gain service

Employer

Train to Gain service

Train to Gain

A new service designed to help businesses get the training they need to succeed.

Train to Gain is being rolled-out nationally by the Learning and Skills Council across England and has been developed from the highly successful Employer Training Pilots.

It can help businesses improve their productivity and competitiveness by ensuring that staff have the right skills to do the best job. Find out more.

Return to list ►

WHAT IS TRAIN TO GAIN?

If your business is to be successful you need to compete, and to compete you need to train your employees.

For businesses, getting the right skills advice is essential to choosing the best and most appropriate training. Train to Gain helps you to do this by using experienced Skills Brokers who can:

- offer free impartial and independent advice to businesses
- match any training needs identified with training providers
- ensure that training is delivered to meet business needs.

One of the key goals of the service is to make sure that both the training and the skills advice are impartial, flexible, responsive, and offered at a time and place to suit businesses. This marks a cultural shift in how skills training will be delivered, and will ensure that the delivery of training is much more responsive to the needs of every business.

Train to Gain and the Learning and Skills Council

The Learning and Skills Council (LSC) is the organisation responsible for making England better skilled and more competitive. We are responsible for planning and funding high-quality vocational education and training for everyone and work closely with businesses to ensure this training meets their needs effectively. Find out more about the LSC.

Research shows that 1.3 million people go to work every day without the skills they require to do their job proficiently. Employers are increasingly investing in staff development and reaping benefits that include improved staff confidence and motivation, higher retention rates and increased productivity. The LSC's vision is that by 2010, young people and adults in England have the knowledge and skills matching the best in the world and are part of a truly competitive workforce. It is only by working in partnership with employers that we will be able to achieve this.

How it works: five simple steps to great training

By ensuring your employees have the right skills to do the best job, Train to Gain can help boost productivity and keep you ahead of the competition. Working closely with a highly experienced Train to Gain Skills Broker, you can provide quality, affordable training for your employees. Together you can:

1. Identify the skills your business needs
2. Pinpoint the right training
3. Agree a tailored training package
4. Find available funding

Step 1: Identify the skills your business needs

Based on a clear understanding of your business goals, your Train to Gain Skills Broker works with you to carry out a free review and analysis of your business to assess what skills your business has right now, and what it might need in the future.

All Train to Gain Skills Brokers are trained by the Learning and Skills Council. They are all specialists in training and have a proven track record of providing effective advice to business. If you need it, they can also provide access to a wider network of business support services.

Step 2: Pinpoint the right training

Your Skills Broker makes training recommendations based on their skills analysis explained in Step 1. The recommendation will help you:

- pinpoint the type of training that best suits your needs
- select the most appropriate training providers (all Train to Gain training providers meet national quality standards)
- choose how and when the training is delivered
- determine which qualifications your employees will benefit most from.

Step 3: Agree a tailored training package

Together with your Skills Broker and the training provider that you select, you agree a training package.

Step 4: Find available funding

Your Skills Broker can recommend the best ways of funding your training, explaining all the funding options available to you. Train to Gain provides some funding itself. This might include:

- Free training to help employees gain their first full Level 2 qualification and Skills for Life first numeracy and literacy qualification. This includes all training towards 5 GCSEs at Grade C or above, NVQ Level 2 or equivalent (such as Skills for Life programmes) and a wide range of other training for low–skilled staff.
- Wage compensation for companies with less than 50 employees.
- Funded programmes, including for Apprenticeships and Advanced Apprenticeships, NVQ Level 3 and above, such as higher education.

Step 5: Review the progress you are making

Your Skills Broker provides continual support and works with you to review how your training is progressing.

TRAIN TO GAIN AND YOUR BUSINESS: HOW DOES IT WORK?

By ensuring your employees have the right skills to do the best job, we can help boost your productivity and keep you ahead of the competition.

You're five easy steps from great training

Working closely with a highly experienced Train to Gain Skills Broker, you can provide quality, affordable training for your employees. Together you can quickly:

1. Identify the skills your business needs
2. Pinpoint the right training
3. Agree a tailored training package
4. Find available funding
5. Review the progress you're making

Step 1: Identify the skills your business needs

Your Train to Gain Skills Broker works with you to carry out a free review and analysis of your business needs to assess what skills your business needs now, and what it might need in the future, based on a clear understanding of your business goals.

The Train to Gain local and regional network of Skills Brokers is trained by the Learning and Skills Council. These specialist advisers have a proven track record of providing effective services to business. Access to a wider network of business support services can also be provided.

Train to Gain will also enhance the LSC's "offer" to large employers through the National Employer Service (NES). The focus of the National Employer Service is on the very large national employers i.e. employers with 5000 or more employees. Find out more about the NES.

Top

Step 2: Pinpoint the right training

Your Skills Broker makes training recommendations based on their skills analysis, explained in Step 1. These will help you:

- pinpoint the type of training that best suits your needs.
- select the right Training Providers (all Train to Gain Training Providers meet national quality standards).
- choose how and when the training is delivered.
- determine which qualifications your employees will benefit most from.

If you wish to establish the provision available you can visit the Employer's Guide to Training Providers. Alternatively find a skills broker in your area.
Top

Step 3: Agree a tailored training package

Together with your Skills Broker and the Training Provider you select, you can agree a training package.
Top

Step 4: Find available funding

Your Skills Broker can recommend the best ways of funding your training, explaining all the funding options available to you. Train to Gain provides some funding itself. This might include:

- **Contribution to wage costs may be available** for companies with fewer than 50 employees with eligible qualifications. Find out more about contribution to wage costs.
- **Funded programmes** access to funding to help employees gain their first full Level 2 qualification and Skills for Life first numeracy and literacy qualification, plus programmes such as Apprenticeships, Advanced Apprenticeships and NVQ Level 3 and above, such as higher education.

Top

Step 5: Review the progress you're making

Your Skills Broker provides continual support and reviews of how your training is progressing.
Top

Making sure Train to Gain works

Skills Brokers are trained to meet national quality standards. The Learning and Skills Council uses ongoing customer satisfaction surveys to monitor the independence, impartiality and quality of the service they provide. It also uses this information to review the Skills Brokers' contracts.

What is the contribution to wage costs scheme?

If you are an employer with fewer than 50 full-time equivalent employees you may be eligible for a contribution to your wage costs. You can apply for a contribution to wage costs for your employees who achieve either their first full level 2 or a Skills for Life qualification which helps your employees achieve a first full Level 2 as part of Train to Gain. If eligible you will receive a contribution of £5 per hour, or the actual wage for every hour, for that employee.

Your Skills Broker will help you apply for your contribution to wage costs. They will also ask for your bank details and also check the claim before it is submitted to the LSC for payment. You also need to release your employee from their normal work duties for training at the times agreed with your learning provider.

If you are have any questions about the contribution to wage costs scheme please contact your regional Skills Broker who will be able to advise further.

L S C

Secondary Research

Train to Gain *Training Initiatives .*

NEWQUAY ZOO

BUSINESS SECTOR:
LEISURE
EMPLOYEES:
49-249
REGION:
SOUTH WEST

Company profile: Newquay Zoo is one of the country's top zoos, specialising in breeding endangered species and running ground-breaking conservation programmes. The zoo is part of the Whitley Wildlife Conservation Trust family, comprising Paignton Zoo, Living Coasts, Slapton Ley and two urban nature reserves.

The Challenge

Although Newquay Zoo had always been focused on its people, it was when they were bought by Paignton Zoo, in August 2003, that they really started looking at training. Paignton had Investors in People status, so they were keen for Newquay to be equally focused on employee development. That meant making sure they were really using training to their advantage.

"The training is proving a tremendous success. The staff think it's great and the benefits to the business are huge."

Diane Eade
Head of Administration and HR

The Solution

Luckily for Newquay, they got to hear about the Employer Training Pilot – the scheme which has now developed into the new national Train to Gain service.

This gave them the opportunity to train and develop their staff, on site, for free. They also got to work with their training provider to develop a learning package that was completely tailored to their needs. As well as having all their training costs covered, they received wage compensation to cover the time their employees spent learning.

Seventeen of their employees have now had training through the scheme – ten in management and seven in NVQ Level 2 programmes directly related to their jobs.

The Results

The zoo is convinced of the benefits of taking part in the programme:

- **Employees are more focused on their roles.**

- **They have learnt new skills and are therefore more motivated and committed to their jobs.**

- **Productivity has gone up.**

Train to Gain

APEX RADIO SYSTEMS

BUSINESS SECTOR:
COMMUNICATION
EMPLOYEES:
5-49
REGION:
NORTH EAST

Company profile: Apex Radio Systems, based in
Newcastle, specialises in the hire and sale of two-way
communications equipment to the retail, leisure and
construction industries.

The Challenge

As a fairly small company, with just ten employees, Apex knew
how crucial it was to train their staff and enhance their
professional skills. "Having a small workforce, it is essential
that our staff improve and build upon the skills they have, so
we can continue to improve our services and customer care,"
explains Customer Service Manager Ian Curry.

"Through programmes like
this, staff can reach their
potential and organisations
can expand to offer a wider
range of services to their
customers."

Ian Curry
Customer Service Manager

The Solution

In 2004, the company signed up to the Employer Training Pilot
– the scheme which has now developed into the new national Train to Gain service. Through the
scheme, they were able to get straightforward advice on what training they needed, as well as
training subsidies and wage compensation to cover the cost of the time spent studying.

Three of their employees have now successfully completed an NVQ Level 2 in Information
Technology. The course, delivered by Newcastle College, covered a broad base of skills including
email distribution and database creation, and took place on site so the employees did not even need
to leave the workplace.

The Results

Thanks to the scheme, Apex has been able to:

- Train their employees in areas specific to their company that will help to shape their
  future success.

- Help their employees develop new skills and reach their full potential.

- Improve the services the company offers and enhance their customer care.

Train to Gain

OWENS GLOBAL LOGISTICS

BUSINESS SECTOR:
TRANSPORT
EMPLOYEES:
5-49
REGION:
SOUTH EAST

Company profile: Owens Global Logistics is an international freight consolidation company, based in West Horndon in Essex. It was set up 15 years ago by Sheldon Copland-Mander, its Managing Director.

"Good training makes for good people and good profits."

Sheldon Copland-Mander
Managing Director

The Challenge

Handling cargo for South Africa, the Far East, New Zealand and Australia is all in a day's work at Owens – and as such, it's a highly pressurised business. Sheldon needed to make sure his team were absolutely confident in what they were doing, and performing to the very best of their ability. "Our key problem is profitability in a very competitive market," he explains. "To be competitive you must have the best people around you."

The Solution

To get the best people, Sheldon knew he needed to invest in training, so he signed up to the Employer Training Pilot – the scheme which has now developed into the national Train to Gain service. This gave him access to a free skills assessment and advice on which training was most appropriate to his company's needs. It wasn't a huge investment either, as the service also included training subsidies and wage compensation to cover loss of earnings while his employees were actually doing the training.
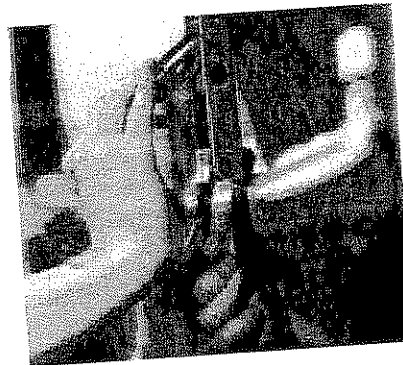
Five of Sheldon's ten staff are now trained to NVQ Level 2 with a special emphasis on customer care. "I'm now looking to do the same with my other five employees – and maybe for myself too," he adds.

The Results

Sheldon is convinced of the benefits of having a well-trained team, and says the programme has:

- Had an impact on productivity.
- Helped boost the company's annual turnover.
- Helped his employees acquire new qualifications which will stay with them for life.

"I'm doing something for my team to show them how much I appreciate them."

Train to Gain

TOYODA GOSEI FLUID SYSTEMS

BUSINESS SECTOR:
AUTOMOTIVE
EMPLOYEES:
50-249
REGION:
EAST MIDLANDS

Company profile: Toyoda Gosei Fluid Systems UK Ltd, based in Leicester, is a leading manufacturer of automotive fluid handling systems.

The Challenge

Toyoda Gosei went through a lot of change to become more competitive, but because it had tended to promote from within, capable operational staff sometimes became managers without developing the right people-management skills.

The Solution

Toyoda Gosei took the opportunity provided by the Employer Training Pilot – the scheme which has now developed into the new national Train to Gain service – to work with South Leicestershire College's Skillspoint, a specialist workforce development team. Skillspoint tailored its service to what Toyoda needed, which was a real analysis of where training could help the company develop its business.

Skillspoint's assessment identified the weakness in management skills. The team then produced a detailed training needs assessment report, which recommended the training Toyoda would need to improve managerial skills, as well as indentifying the right providers. Their report also showed what funding might be available to help with training costs.

The Results

"The difference in the business is marked," believes Dave Nibloe, the Human Resources Manager at Toyoda.

- Finding training providers who matched exactly what Toyoda needed made sure the business got value for money from its investment in training.

- Staff morale improved – and that means better business results: "Participating staff have shown increased enthusiasm which is channelled into their work."

- Management skills have directly benefited, with investment in developing team leaders. "Eight of our team leaders have now studied for the Institute of Leadership and Management (ILM) Introduction to Team Leadership qualification."
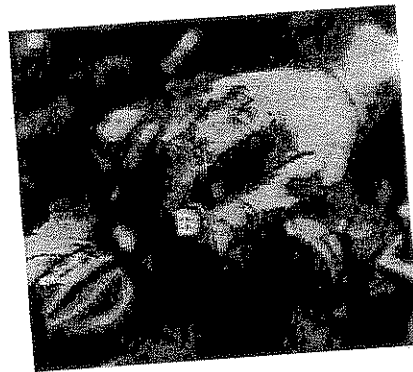
"The fact we receive funding in compensation for time spent by employees doing training, coupled with individuals benefiting from better skills within the workplace, makes it a win-win scenario for employer and employee alike."

Dave Nibloe
Human Resources Manager

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Shipley College

More in this section:

> Case Study - Bradford Social Services

Train to Gain

Train to Gain (TtG) is a government subsidised training scheme that was deve from the highly successful Employer Training Pilots where thousands of busir and employees benefited. If your employees meet the criteria set you will be e to receive this training free of charge.

Train to Gain focuses on practical training to help your employees gain a full-two qualification and add real value to your business.
You can choose from 'Skills for Life' (English, Maths or English for Speaker: other Languages (ESOL), a National Vocational Qualification (NVQ) Level 2 National Vocational Qualification for IT Users (ITQ) Level 2.

Skills for Life programmes offer support for your employees to update their sl and develop their abilities and include areas such as cash handling, writing let telephone skills.

 The National Vocational Qualifications (NVQ's) we offer are
Administration
Business Administration
Care
Children's Care, Learning and Development
Customer Service
Horticulture
ITQ (IT Users)
Support Services
And many more

There is no requirement for your employees to attend the College as the NVQ assessor will visit your workplace. The assessor observes your employees carr out their normal daily tasks within the workplace to build a portfolio of evider NVQs are for life and will show your employees have achieved a nationally recognised standard in their profession.

To be eligible
You need to be over 25
Not have an existing level 2 qualification (5 GCSEs at grade C or above)
Have been an EU resident for 3 years or over
Have a permanent NI number and a contract of employment

If you meet all four requirements, please contact our Workforce Development on 01274 327327 or enquires@shipley.ac.uk
Shipley College works as part of the West Yorkshire Consortium of Colleges. more information please click here.

If you would like further information about Train to Gain please visit the webs

>LSC

Leading learning and skills

Home > What we do > Adult Learner > National Skills Strategy

Adult Learner

National Skills Strategy

In July 2003 the Government launched its new National Skills Strategy. Its goal is to maximise the contribution of skills to raising productivity, economic competitiveness and sustainable employment in the UK. The Learning And Skills Council (LSC) wants to support business in developing the skilled workforce it needs to achieve key business objectives: improving productivity; retaining staff; reducing costs and increasing profits.

The LSC has teamed up with the British Chambers of Commerce (BCC) in the Great Skills Debate now gathering momentum up and down the country. From Devon to Durham local LSCs and Chambers are gathering the views of employers and business people on the current crisis in skills in England, and how to address it.

You can have your say in person or electronically – contact you local LSC to find out when they're holding events. In some regions there are online questionnaires and telephone hotline services to capture your opinions.

You can get a copy of the Skills for the 21st Century whitepaper at www.dfes.gov.uk/skillsstrategy

Return to list ▶

Information Advice and Guidance

IAG – what it is and why it's important

IAG stands for Information, Advice and Guidance – in itself a shorthand term for a range of vital services that help people to make important decisions about their future – decisions which will ultimately support greater economic and social mobility.

The number of adults who are involved in learning is set to increase dramatically over the next few years and people need access to reliable information, advice and guidance to help them reach all-important decisions about how to:

- develop the best possible range of skills
- find the right training for the right job
- make the most of workplace opportunities
- assess future career options
- get other vital information about issues that affect working life – such as childcare.

IAG – part of the wider skills package

The Government's Skills White Paper 2005, set-out a long-term objective for IAG – to make it a universally available, high-quality and well-used service offering information, advice and guidance to adults about:

- Jobs
- Qualifications
- Training
- Related-services – such as childcare.

How people receive IAG services will depend on their age, qualifications and circumstances. For example, people might get IAG in their workplace or from tutors in educational institutions and IAG is also offered through a wide range of other sources and media including over the phone, through face-to-face discussions or via the web.

The big picture on IAG

Click here if you'd like to see the BIG PICTURE for IAG.

Home | IAG and the LSC | Other IAG service providers | Work based IAG | IAG - an integrated service | IAG and offenders | The matrix quality standard | 10 key principles for delivering IAG | The IAG review |
A to Z |

http://iag.lsc.gov.uk/   09/03/2007

> **lSC**

Leading learning and skills

News updates

Politician Backs Employee Training Scheme For Yorkshire And The Humber

One of the country's top politicians has paid a special visit to a Yorkshire leisure centre, in support of the Learning and Skills Council's new employee training service, Train to Gain.

John Healey MP, Financial Secretary for the Treasury and MP for Wentworth, is backing the Government-funded initiative, which aims to improve the skills of the workforce and help local businesses to keep their competitive edge.

The free skills brokerage service, which is managed by the LSC, offers businesses access to independent, impartial and practical advice, which will help to match training needs with local training providers and ensure that bespoke, flexible and responsive training programmes are delivered to meet individual employers' needs.

Mr Healey paid a special visit to Herringthorpe Leisure Centre in Rotherham, where stadium attendant Carl Harrison has become one of the first in the region to benefit from the Train to Gain service.

The Train to Gain brokers are all experts in their particular field and, alongside sport and leisure, are able to cover a wide range of sectors, from agriculture and construction to social care and retail.

Some of the assistance offered by the Train to Gain service is eligible for full or partial subsidy, making it ideal for a variety of companies, including smaller businesses.

Margaret Coleman, Regional Director for the LSC in Yorkshire and the Humber, said: "Train to Gain gives employers a single point of contact through which to assess the needs of their business and gain access to the relevant training, with independently verified and trusted training providers. Ultimately, it puts employers in the driving seat, offering them free skills advice in a time and place to suit their needs and helping them to ensure they remain 'fit for business."

John Healey said: ""In this day and age, successful businesses are those with a skilled workforce, and, increasingly, an individual's own job security and career prospects depend on them having the skills that employers need. Through Train to Gain, the Government is providing significant support for companies to raise the skills of their low-skilled employees, which will help to give Britain's economy

companies, and workers, a vital skills and productivity boost."

Peter Atkinson, Herringthorpe Leisure Centre Manager, for Rotherham Borough Council, added: "Train to Gain is an invaluable service that anyone can take on board. It offers employees a recognised qualification that they can put into practice in their current role and take with them as their career progresses."

For more information about Train to Gain in Yorkshire and the Humber, call **0845 833 7000** or visit www.traintogain.gov.uk

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Name:	**McDonalds**
Size:	1000 +
Sector:	Food Retail
Location:	National
Theme:	Skills Development

The Organisation
McDonald's is one the world's leading food retailer, with over 32,000 restaurants across the globe. In the UK, McDonald's has been established for over 30 years.

The Challenge
McDonald's has held the Investors in People Standard since 1998. When their fourth review became due in August 2005, they took the decision to take assessment against the Investors in People Profile tool, which had been launched in May 2005.

McDonald's wanted to establish their position against the Investors in People Standard and use the Profile tool to explore their people practices in detail. In particular, they wanted to generate detailed feedback that would help them shape their people strategy, identifying areas of good practice and opportunities for further development.

With over 30 successful years in the UK and three highly successful Investors in People assessments in the last 7 years, McDonald's felt they were very well placed to tackle Profile assessment. They decided to embark upon the assessment process without any preparatory work or internal assessment.

The Strategy
Profile

The Profile tool is designed to provide stretch and recognition to organisations by building on the Investors in People Standard.

The levels of Profile are:
Level 1 - The Investors in People Standard
Level 2 - exceeding the Standard
Level 3 - significantly exceeding the Standard
Level 4 - best practice/world class

The Assessment

750 McDonald's employees were randomly selected to complete on-line questionnaires, and 250 people participated in either individual or group interviews with IiPCS Assessors. The employees represented a cross section of McDonald's consisting of crew, restaurant management, office staff and members of the executive team.

The Result
McDonald's met all 10 indicators of the Standard. They exceeded the Standard in 7 of those indicators, and they significantly exceeded it in a further 3.For indicator 3,People Management, they were awarded World Class status.
McDonald's will leverage these excellent results to continue to enhance their strong brand as an employer of choice.

LSC News
Yorkshire and the Humber

Issue 1

> LSC

Leading learning and skills

Welcome to **LSC News**, the first issue of our e-newsletter which aims to keep you up-to-date with news and views from the LSC in Yorkshire and the Humber.

You will read in one of the stories that the skills gap is falling in Yorkshire and the

Margaret Coleman - Regional Director

Humber but there is still a big challenge for us to make our region better skilled and more competitive. We have a single goal: to improve the skills of young people and adults to world-class standards. Our vision is that by 2010, they have the knowledge and skills matching the best in the world and are part of a truly competitive workforce.

Are we winning in Yorkshire and the Humber?

- 75% of young people are now in education and training the highest figure ever.
- Over 120,000 adults have improved their basic skills levels in reading, writing and maths in the past four years.
- There are over 67,000 apprentices - a record number.
- The LSC has invested £197 million in redeveloping colleges.
- Plus, we've worked with over 3,000 employers, helping them train their staff.

But we know there is much, much more to do. We're focusing on achieving better quality and more consistent delivery by creating local Partnership Teams, which will work alongside local Economic Development Teams who will focus on skills for employers and regeneration. Our regional centre in Bradford will deliver operational services such as finance and build stronger regional links with partners.

Re-focused energies, efforts and resources

We need to get under the skin of local needs and ensure that funding and delivery of local learning and training is relevant and delivered quickly. Our transformation will see the vast majority of our
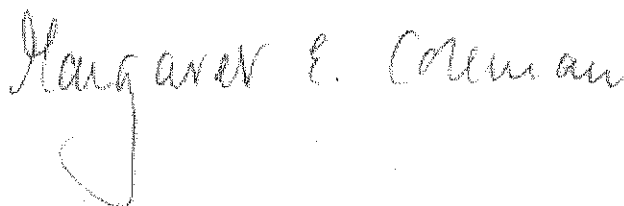
workforce focused outwards on front line delivery through strategic relationships at the local and regional level.

With the creation of our regional centre in Bradford and 15 local Partnership Teams we will be working in a more streamlined way across Yorkshire and the Humber.

To have a real impact at grassroots level, our Partnership Teams will focus on their local areas. They will really know their patch inside out. This will enable them to lead and support the delivery of the 14-19 agenda, personal and community development, and ensure that national and regional skills priorities are delivered in a way that best meets local needs.

We're determined to make the LSC a more dynamic, more locally driven organisation so that it can better provide the leadership the post 16 education sector needs. As you read LSC News over the coming months, we hope you will begin to see the impact that the LSC is having in our region. We would welcome your feedback on the stories you would like see here.

Yours sincerely,

Margaret E. Coleman

Margaret Coleman
Regional Director

back to newsletter

If you have a story for LSC News please email us at:
lscfeedback@harrisoncowley.com.
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www.lsc.gov.uk

Small businesses back Train to Gain

Small businesses back Train to Gain
Employers around the country, even those who would not normally think about training, are getting behind Train to Gain. Nearly 22,000 have signed up for the free Skills Brokerage service since August 2006, which offers tailored, impartial, independent advice on training, sourcing training providers and funding to suit individual business needs.
Skills Minister Phil Hope said:
"Train to Gain is an ambitious new approach to workplace skills. It is a key part of this Government's drive to push skills high up the agenda and maintain our competitiveness. Brokers are targeting the hardest to reach employers who have not traditionally trained their staff. We are reaching out to SMEs in particular who can make use of free provision to give people the crucial platform of skills for employability".
Train to Gain is based on listening to employers. Jaine Clarke, Director of Skills for Employers at the Learning and Skills Council (LSC) said:
"Current figures show 80 per cent (16,930) of employers using the service are new to training, mainly from small businesses. Today, Train to Gain has over 75,000 learners, the majority from small businesses in sectors where low skills traditionally predominate, such as process, plant and machine operatives. The service is really helping to boost the nation's productivity by honing the skills of the existing workforce - 70 per cent of employees learning through Train to Gain are aged 25- 49."

More Young People Meet Learning Target

More young people across England gained level 2 qualifications in 2006 (five GCSEs grades A*-C or the vocational equivalent), according to new figures published today. The increase means that the equivalent of over 40,000 more 19 year olds have achieved better prospects for good careers, compared to those who turned 19 in 2004.
By achieving the key level 2 qualifications, young people can look forward to: A higher starting salary – of £1,700 more a year, compared to those without five good GCSEs or the vocational equivalent and an 88 per cent higher chance of skilled employment. In 2004, 66.3 per cent of 19 year olds had reached level 2, but figures show that 71.4 per cent achieved this level last year – surpassing the target the DfES set the LSC of 69.3 per cent.
Melanie Hunt, National Director of Learning at the LSC, said:
"Meeting this target is a real achievement for young people and everyone involved in the learning sector. It should be welcomed by all those who care about young people's futures.
"These figures also suggest that the traditional financial barrier to participation after 16, experienced by young people in the past, is now being tackled, thanks in part to schemes such as Education Maintenance Allowance. The results mean that the Department for Education and Skills and LSC have met their targets to increase the number of 19 year olds achieving level 2 by 2006.
An increasing proportion of 19 year olds have also qualified to Level 3 – equivalent to 2 A levels – a percentage increase of 4.7 since 2004, also in line with Government targets.

Leading learning and skills

Yorkshire and the Humber > News > News updates > The Tools for Success

News updates

The Tools for Success

More than 15,000 employers are now using Train to Gain, the Learning and Skills Council's (LSC's) new service, offering expert advice and sourcing training for businesses. With demand for the service soaring, there has been an eight-fold increase in the number of employers starting training since the service was rolled-out across England in August.
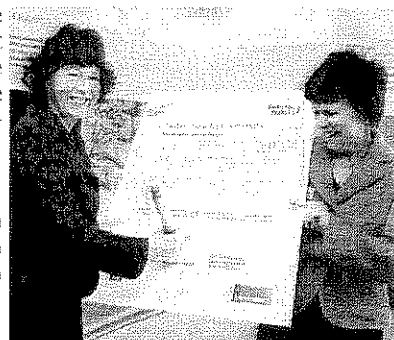
The Leitch Report on the UK's long term skills needs published in December, acknowledged the contribution Train to Gain makes in equipping workers with the skills they require to make them competitive on a global scale.

Skills shortages in the UK continue to have a crippling effect on the economy. More than a third of adults in the UK do not have a basic school qualification, five million adults do not have any qualifications at all and according to the LSC, illiteracy and innumeracy alone is costing the nation £10bn in lost revenue.

Jobcentre Plus Director for Yorkshire and the Humber Gill Farnsworth proudly declared her organisation's support for the Train to Gain service at a joint signing ceremony with the LSC at Leeds Eastgate Jobcentre Plus. Gill was joined by Margaret Coleman, Regional Director for the LSC in Yorkshire and the Humber as the organisations committed to help each other deliver quality services to employers, employees and jobseekers.

Gill Farnsworth says: "I believe Train to Gain can pay real dividends in the Yorkshire and Humber region. Jobcentre Plus are delighted to work in partnership with our colleagues in the LSC to improve the skills of employees. Investment in skills and training made by employers will result in a motivated workforce committed to their employment.

What is Train to Gain?

"If your business is to be successful you need to compete, and to compete you need to train your employees." The LSC's regional director, Margaret Coleman explained. "For businesses, getting the right skills advice is essential to choosing the best and most appropriate training. Train to Gain helps people to do this by using experienced Skills Brokers who can, offer free impartial and independent advice to businesses, match any training needs identified with training providers and ensure training is delivered to meet business needs."

The LSC believes a key goal of the service is to make sure that both the training and the skills advice are impartial, flexible, responsive, and offered at a time and place to suit businesses. This marks a cultural shift in how skills training will be delivered, and will ensure that the delivery of training is much more responsive to the needs of every business.

Margaret Coleman continued: "Train to Gain can play an instrumental role tackling the skills crisis head-on. By providing employers with expert advice on how and where to train staff to increase productivity, we are doing just what employers told us they need to succeed. Train to Gain is now helping over 50,000 employees get qualifications.

"Train to Gain is all about listening to employers. It is really delivering, with 89% of the employers using it telling us they are satisfied with the service. We're confident we've built a robust service that is here to stay."

The service aims to work with 33,000 employers in 2006/07 and 53,000 employers in 2007/08 and successive years to 2010. Of these, more than half will be new or hard to reach employers.

Performance management: an overview

Originally issued August 2004; latest revision February 2007
This factsheet gives introductory guidance. It:

* considers the performance management process and how it works
* outlines the tools used in performance management
* includes the CIPD viewpoint.

Fully realised, performance management is a holistic process, bringing together many of the elements which go to make up the successful practice of people management, including in particular learning and development. But for this very reason, it is complex and capable of being misunderstood. This factsheet cannot go into all the details, but it gives an overview so that readers will have a better understanding of the fundamentals when they undertake the necessary further reading.

What is performance management?

In their definitive text[1] upon which this factsheet is based, Armstrong and Baron define performance management as 'a process which contributes to the effective management of individuals and teams in order to achieve high levels of organisational performance. As such, it establishes shared understanding about what is to be achieved and an approach to leading and developing people which will ensure that it is achieved'. They go on to stress that it is 'a strategy which relates to every activity of the organisation set in the context of its human resource policies, culture, style and communications systems. The nature of the strategy depends on the organisational context and can vary from organisation to organisation.'
In other words performance management should be:

* **Strategic** - it is about broader issues and longer-term goals
* **Integrated** - it should link various aspects of the business, people management, and individuals and teams.

It should incorporate:

* **Performance improvement** - throughout the organisation, for individual, team and organisational effectiveness
* **Development** - unless there is continuous development of individuals and teams, performance will not improve
* **Managing behaviour** - ensuring that individuals are encouraged to behave in a way that allows and fosters better working relationships.

Armstrong and Baron stress that at its best performance management is a tool to ensure that managers manage effectively; that they ensure the people or teams they manage:

* know and understand what is expected of them
* have the skills and ability to deliver on these expectations
* are supported by the organisation to develop the capacity to meet these expectations are given feedback on their performance
* have the opportunity to discuss and contribute to individual and team aims and objectives.

It is also about ensuring that managers themselves are aware of the impact of their own behaviour on the people they manage and are encouraged to identify and exhibit positive behaviours.

So performance management is about establishing a **culture** in which individuals and groups take responsibility for the continuous improvement of business processes and of their own skills, behaviour and contributions. It is about **sharing** expectations. Managers can clarify what they expect individual and teams to do; likewise individuals and teams can communicate their expectations of how they should be managed and what they need to do their jobs. It follows that performance management is about **interrelationships** and about improving the quality of relationships - between managers and individuals, between managers and teams, between members of teams and so on, and is therefore a **joint** process. It is also about **planning** - defining expectations expressed as objectives and in business plans - and about **measurement**; the old dictum is 'If you can't measure it, you can't manage it'. It should apply to **all employees**, not just managers, and to **teams** as much as individuals. It is a **continuous** process, not a one-off event. Last but not least, it is **holistic** and should pervade every aspect of running an organisation.

How does performance management work?

Because performance management is (or should be) so all-pervasive, it needs structures to support it. These should provide a framework to help people operate, and to help them to help others to operate. But it should not be a rigid system; there needs to be a reasonable degree of flexibility to allow people freedom to operate.
Performance management is a process, not an event. It operates as a continuous cycle. Corporate strategic goals provide the starting point for business and departmental goals, followed by agreement on performance and development, leading to the drawing up of plans between individuals and managers, with continuous monitoring and feedback supported by formal reviews. ·

Tools of performance management

It is impossible to go into details of each of the tools used by performance management, so the following paragraphs simply provide an outline.

Performance and development reviews

Many organisations without performance management systems operate 'appraisals' in which an individual's manager regularly (usually annually) records performance, potential and development needs in a top-down process - see our factsheet on *Performance appraisal* for more information on this topic.

It can be argued that the perceived defects of appraisal systems (that line managers regarded them as irrelevant, involving form-filling to keep the personnel department happy, and not as a normal process of management) led to the development of more rounded concepts of performance management. Nevertheless, organisations with performance management systems need to provide those involved with the opportunity to reflect on past performance as a basis for making development and improvement plans, and the performance and development review meeting (note the terminology; it is not appraisal) provides this chance. The meeting must be constructive, and various techniques can be used to conduct the sort of open, free-flowing and honest meeting needed, with the reviewee doing most of the talking.

Learning and development

Employee development is the main route followed by most organisations to improved organisational performance, which in turn requires an understanding of the processes and techniques of organisational, team and individual learning. Performance reviews can be regarded as learning events, in which individuals can be encouraged to think about how and in which ways they want to develop. This can lead to the drawing up of a personal development plan (PDP) setting out the actions they propose to take (with the help of others, not least their managers) to develop themselves. To keep development separate from performance and salary discussions, development reviews may be held at other times, for example, on the anniversary of joining an organisation.
Increasing emphasis on talent management also means that many organisations are re-defining performance management to align it to the need to identify, nurture and retain talent.

Development programmes are reflecting the needs of succession plans and seeking to foster leadership skills. However, too much of an emphasis on talent management may be damaging to overall development needs and every effort needs to be made to ensure that development is inclusive, accessible and focused on developing organisational capability.

Coaching

Coaching is an important tool in learning and development. Coaching is developing a person's skills and knowledge so that their job performance improves, leading to the achievement of organisational objectives. Coaching is increasingly recognised as a significant responsibility of line managers, and can play an important part in a PDP. They will take place during the review meetings, but also and more importantly should be carried out throughout the year. For some managers coaching comes naturally, but for many they may not and training may be needed to improve their skills. See our factsheet on *Coaching* for more information.

Objectives and performance standards

Objectives (some organisations prefer to use 'goals') describe something to be accomplished by individuals, departments and organisations over a period of time. They can be expressed as targets to be met (such as sales) and tasks to be completed by specified dates. They can be work-related, referring to the results to be attained, or personal, taking the form of developmental objectives for individuals. Objectives need to be defined and agreed. They will relate to the overall purpose of the job and define performance areas - all the aspects of the job that contribute to achieving its overall purpose. Targets then need to be set for each performance area, for example, increase 'sales by x per cent', 'reduce wastage by y per cent' ...

Alongside objectives are performance standards. They are used when it is not possible to set time-based targets, or when there is a continuing objective which does not change significantly from one review period to the next and is a standing feature of the job. These should be spelled out in quantitative terms if possible, for example, speed of response to requests or meeting defined standards of accuracy.

Competences and competencies

Some organisations, but by no means all, use competences and competencies as components of performance management. Competences describe what people need to be able to do to perform a job well (the descriptions in National Vocational Qualifications are examples of competences). Competencies (more helpfully, 'behavioural competencies') are defined as the dimensions of behaviour that lie behind competent performance. Though the language used does not help in making the distinction, to perform well it is necessary both to be able to do a job at a technically competent level and to have behaviours that reinforce those technical skills; an obvious example of behaviour is the surgeon who needs a good bedside manner and to be able to communicate with colleagues, in addition to surgical skills. There are various techniques for measuring competence (some organisations prefer to use 'capability') and once an analysis has been made, it provides a tool for measuring performance and, of course, for providing development activities to help people meet the required standards. For more information, see our factsheet on *Competency and competency frameworks*.

Measurement

To improve performance, you need to know what current performance is. Measurement provides the basis for providing and generating feedback, and thus can build the platform for further success or identify where things are going less well so that corrective action can be taken. But what gets measured? Measure the wrong things, perhaps simply because they are easy to measure, and an entire performance management system can fall into disrepute. Use too many measures and you can't see the wood for the trees. For measuring performance, the achievement of objectives, levels of competency, standards of performance, and work outputs are used but the emphasis varies according to categories of staff - for example, a senior manager would be mainly measured by meeting objectives, but a production worker

mainly by achieving outputs. Increasingly organisations are using more sophisticated measuring techniques such as balanced scorecards or ROI (return on investment). Individual and team performance needs to be capable of being linked in an understandable manner to organisational performance, and there are various approaches to this. They include the 'balanced scorecard', a set of measures that looks at the business from customer, internal, learning and financial perspectives; the European Foundation for Quality Management, which indicates that customer satisfaction, employee satisfaction, and impact on society are achieved through leadership; and other economic measures, including traditional financial measures. Measures used will depend on the organisation; for example, public service organisations are likely to use different measures from private companies.

Pay

Performance management is often linked with **performance-related pay** (PRP), although by no means all organisations claiming to use performance management have PRP. Nevertheless, PRP is an important element in many performance management schemes because it is believed to motivate; it is said to deliver the message that performance and competence are important, and it is thought to be fair to reward people according to their performance, contribution or competence. Others, though, believe that other factors are more important than PRP in motivation; that it is usually based on subjective assessments of performance, that it inhibits teamwork because of its individualistic nature, and that it leads to 'short-termism'. An alternative to PRP is **competence-related pay**, which provides for pay progression to be linked to levels of competence that people have achieved, using a competence profile or framework. The difficulty here is measuring competence, and some organisations use a mix of PRP and competence-related pay. Further possible pay systems are **team-based pay**, a kind of PRP for teams; and **contribution-related pay** which means paying for results plus competence, and for past performance and future success. Performance may be used to determine all or some aspects of pay. In many instances only non-consolidated bonus payments are linked to performance which tend to reflect organisational, team and individual performance whilst salary progression is linked to service, market rates and pay scales.
Many organisations believe that when performance management is linked to pay the quality of performance discussions will inevitably deteriorate.

Teams

Team working has become an important part of life in many organisations, and where teams are permanent or for longstanding projects, measures can be based on team performance. They will mainly be concerned with output, activity levels (eg speed of servicing), customer service and satisfaction, and financial results. Indeed, team measures are not very different from those for individuals, and of course team members need to agree their objectives and receive feedback in the same way as if they were not part of a team. Other team members can contribute towards this, in a process of peer review.

360-degree feedback

360-degree feedback became increasingly talked about in the 1990s, if not widely used. It consists of performance data generated from a number of sources, who can include the person to whom the individual being assessed reports, people who report to them, peers (team colleagues or others in the organisation), and internal and external customers. It can also include self-assessment. 360-degree feedback is used mainly as part of a self-development or management development programme, and is felt to provide a more rounded view of people, with less bias than if an assessment is conducted by one individual.

Performance problem solving

Performance management is a positive process, and good systems will create a culture in which success is applauded. Nevertheless, poor performance will exist. It may be a result of inadequate leadership, bad management or defective systems of work, and if so, remedies (often involving learning and development) can be put in place. But individuals may under-perform and improvements can be achieved through continuing feedback and joint discussion between them and their managers, involving analysing and identifying the problem,

establishing the reasons for the shortfall, and deciding and agreeing the action to be taken. If all this fails, disciplinary action may need to be taken, as in any organisation.

CIPD viewpoint

Performance management is difficult to implement. It is about ownership by everyone in the organisation, and especially line managers - it is emphatically not about guardianship by personnel departments. Surveys suggest that individuals and managers in organisations with performance management systems quite like it, and especially its emphasis on personal development, although performance-rating (often linked to PRP) often provokes hostility. Schemes can be over-detailed and require too much form-filling, and there can be a lack of definition in terms of what is meant by performance and how to achieve it. Schemes can be less successful than they might be because of lack of training, especially at the beginning. The keys to the successful introduction and application of performance management are:

- being clear about what is meant by performance
- understanding what the organisation is and needs to be in its performance culture
- being very focused on how individual employees will benefit and play their part in the process
- understanding that it is a tool for line managers and its success will depend on their ability to use it effectively.

Coaching

Originally issued November 2004; latest revision August 2006
This factsheet gives introductory guidance. It:

- explains what coaching is
- introduces some of the issues and gives guidance on how to tackle them
- explains the role HR plays in managing coaching activities
- includes the CIPD viewpoint.

Coaching is an increasingly popular tool for supporting personal development. Almost eight out of ten respondents in our *Learning and development survey 2006*[1] reported that they now use coaching in their organisations. Of these four fifths say that their organisation is seeking to develop a coaching culture.

Although coaching has become a very widespread development tool, there are issues about how best to manage and deliver it in an organisational setting. These include confusion over exactly what coaching is, how best to manage the stakeholders in coaching, when coaching is, and is not, an appropriate intervention and how to work effectively with a complex coaching industry.

What is coaching?

There is some confusion about what exactly coaching is, and how it differs from other 'helping behaviours' such as counselling and mentoring. Broadly speaking, the CIPD defines coaching as 'developing a person's skills and knowledge so that their job performance improves, hopefully leading to the achievement of organisational objectives. It targets high performance and improvement at work, although it may also have an impact on an individual's private life. It usually lasts for a short period and focuses on specific skills and goals.'[2]

Although there is a lack of agreement among coaching professionals about precise definitions, these are some generally agreed characteristics of coaching in organisations:

- It is essentially a non-directive form of development.
- It focuses on improving performance and developing individuals' skills.
- Personal issues may be discussed but the emphasis is on performance at work.
- Coaching activities have both organisational and individual goals.
- It assumes that the individual is psychologically well and does not require a clinical intervention.
- It provides people with feedback on both their strengths and their weaknesses.
- It is a skilled activity.

It can be difficult to distinguish between coaching, mentoring and counselling. In practice, 'mentoring' for example is sometimes used interchangeably with 'coaching'. Traditionally, however, mentoring in the workplace has tended to describe a relationship in which a more experienced colleague used their greater knowledge and understanding of the work or workplace to support the development of a more junior or inexperienced member of staff.
Similarly, it can be hard to draw a clear distinction between coaching and counselling, not least because many of the theoretical underpinnings of coaching are drawn from the worlds of counselling and therapy. For the purpose of managing coaching services the key distinction to be drawn is that coaching is for those who are psychologically well; a coach should be able to recognise where an individual is so distressed by personal or social issues that he or she needs to be referred to specialist counselling or other support. For a more detailed discussion of the differences between coaching, mentoring and counselling see our guide *Coaching and buying coaching services*[2].

Developing a coaching culture

In recent CIPD research, Clutterbuck and Megginson describe a coaching culture as one where 'coaching is the predominant style of managing and working together and where commitment to improving the organisation is embedded in a parallel commitment to improving the people'[3].

Of those respondents to our *Learning and development survey 2006* who use coaching, an overwhelming majority (93%) said that they believe that a coaching culture is either 'very important' or 'important' to the success of their organisation. More than seven out of ten (72%) identify improving individual and business performance as the main objectives for developing a coaching culture. When asked what activities they were implementing to support this, 47% indicated that they are training line managers in coaching skills, 18% said they are providing coaching via a network of internal and external coaches and 35% said that they were combining both of these approaches.

Who delivers coaching in UK organisations?

Coaching services are delivered by external coaches, full-time and part-time internal coaches who may be line managers, or members of the HR department. Megginson and Clutterbuck have argued that it is helpful to enable internal and external coaches to share supervision arrangements and to have opportunities to discuss coaching generally. This enables external coaches to get a better understanding of the organisation and also enables them to share their perspectives on what is happening within the organisation.

Coaching supervision

Coaching can be a challenging and sometimes lonely activity and coaches need structured opportunities to reflect on their practice. This may be in one to one or group sessions. Such opportunities can help coaches continuously to develop their skills as well as provide them with support. It can also be an important quality assurance activity for organisations and a source of organisational learning about issues being addressed in coaching sessions. CIPD will publish guidance on coaching supervision in November 2006.

Stakeholders in coaching

The primary relationship in any coaching activity is between the coach and the individual, but this is not the only important relationship. Other key stakeholders include the person representing the organisation's interests – most frequently an HR practitioner and the individual's manager. Both of these parties are interested in improving the individual's performance and therefore their contribution to the organisation.

The four-cornered contract[2]
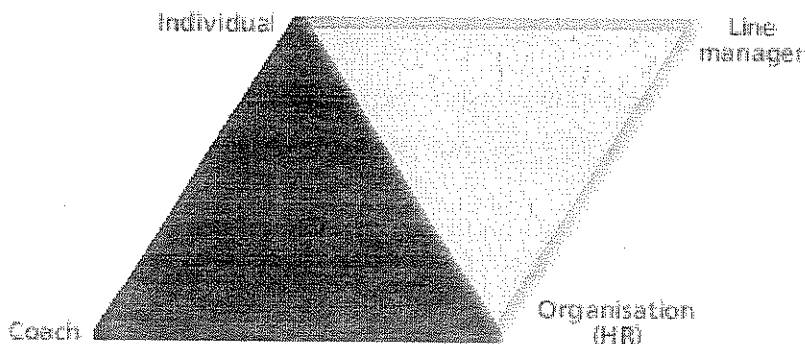
In situations where the manager is the coach, the other stakeholders are depicted by the central triangle of relationships. It is very important to establish guidelines on confidentiality and information flow early on to develop trust between the individual and coach, and the other multiple stakeholders.

When is coaching the best development intervention?

The first step will be the identification of some kind of learning or development need, either by the individual themselves, their line manager or some one from the HR department. Once this has been identified, the next step is for the manager and the individual to decide how best the need can be met.

Coaching is just one of a range of training and development interventions that organisations can use to meet identified learning and development needs. Its merits should be considered alongside other types of development interventions, such as training courses, mentoring or on-the-job training. Employee preferences should also be borne in mind. There is a danger that coaching can be seen as a solution for all kinds of development needs. It is important that coaching is only used when it is genuinely seen as the best way of helping an individual learn and develop. .

Decision tree: is coaching an appropriate intervention?[2]
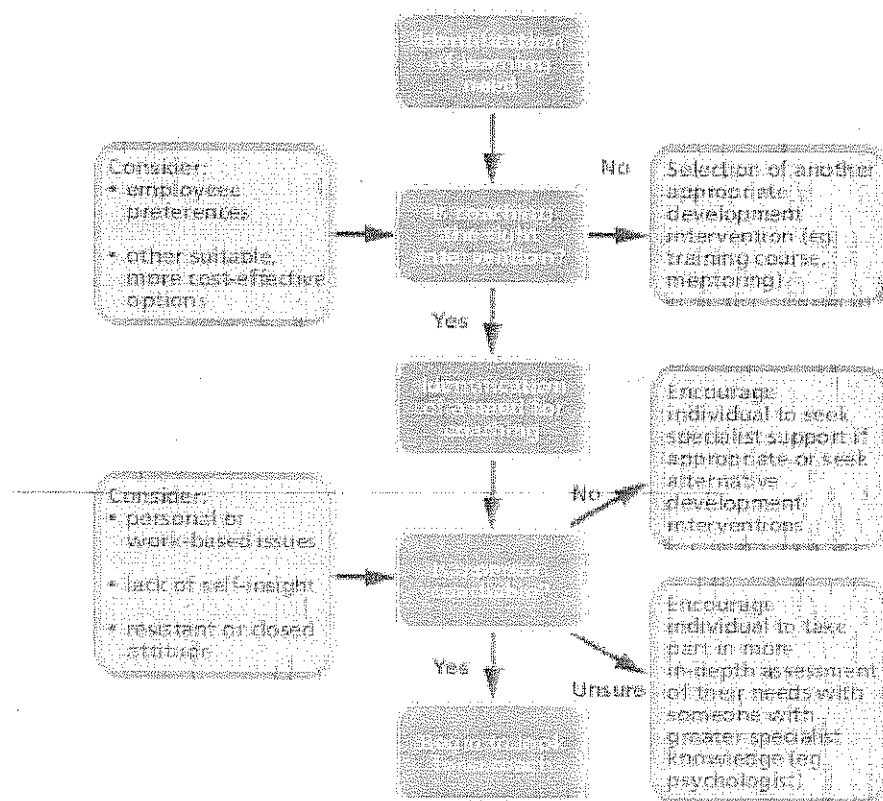
Some examples of situations where coaching is a suitable development tool include:

* helping competent technical experts develop better interpersonal or managerial skills
* developing an individual's potential and providing career support
* developing a more strategic perspective after a promotion to a more senior role
* handling conflict situations so that they are resolved effectively.

It is important to remember that here are some individuals who may not respond well to coaching. This may be because their problems are best dealt with by another type of

intervention, or it may be because their attitude may interfere with the effectiveness of coaching. So before coaching is begun, organisations need to assess an individual's 'readiness'. Some examples of situations when coaching is not an appropriate intervention are if the individual has psychological problems, they are resistant to coaching or they lack self-insight.

The role of HR in managing coaching activities

The HR department has a central role to play in designing and managing coaching within an organisation. The quality of coaching and the results it delivers depend on choosing appropriate coaches (line managers, internal or external coaches), managing relationships and evaluating success. HR practitioners need to understand when coaching is an appropriate and effective intervention in relation to other learning and development options. They need to be clear about what the different types of coaching and diagnostic tools/models are, and when each is appropriate. They need to understand how to select appropriately qualified coaches and then match them to both the organisational culture and to the needs of particular individuals. Finally, HR practitioners hold the responsibility for setting up contractual arrangements, as well as developing mechanisms to evaluate the effectiveness of the coaching activities.

For more guidance on all these see our guide *Coaching and buying coaching services*[2].

CIPD viewpoint

Coaching is now a widespread development tool, being used by organisations across the UK. However, as it is a relatively new area there is still a lack of understanding about how best to use coaching and in what specific situations it will be most effective. It is important that the HR department understands when each type of coaching is appropriate and makes sure that all parties are fully equipped for their role in the coaching, whether it is as a participant, as a line manager of a participant or as the coach itself.

The coaching industry itself is very young, and because of this there is a lack of established standards, professional bodies and qualification frameworks. HR professionals need to ensure they have a good understanding of the coaching industry when advising their organisations about whether or not they should introduce coaching to the organisation. They also have an important role in ensuring that coaches are supported by supervision arrangements and that effective quality assurance arrangements are in place.

Identifying learning and training needs

January   2007

This factsheet gives introductory guidance. It:

- looks at the nature of training needs analysis (TNA)
- considers why TNA is important in an organisational setting
- lists the data to include
- outlines what follows a TNA exercise.

There is an axiom which states that all training provision should be based on the accurate identification of learning needs. However, all too often the actual process of identifying training needs is undertaken in a 'quick and dirty' fashion or, worse still, omitted altogether. This factsheet outlines an approach that will help to ensure that training supports organisational objectives.

Learning or training?

Strictly speaking, the analysis of gaps in knowledge and skills identifies what employees will need to learn in order to be fully competent in the jobs they will be doing now and in the future. How these gaps are filled may involve formal or informal training provision, or other opportunities for the necessary learning to be carried out. However, training and learning professionals have been using the acronym 'TNA' for the process of identifying these gaps for many years, and this factsheet follows that tradition, without necessarily insisting that the means of filling the gaps is through formal training.

What is training needs analysis?

TNA is the systematic gathering of data to find out where there are gaps in the existing skills, knowledge and attitudes of employees. It involves the gathering of data about existing employees' capabilities and organisational demands for skills, and the analysis of the implications of new and changed roles for changes in capability.
It often flows from the business strategy, as the aim of identifying needs is to be able to build a plan to offer appropriate learning opportunities to fill the gaps identified and ensure that there is sufficient capability for the organisation to meet its objectives.

Why is needs analysis important?

Careful analysis of needs is important because:

- Unless the right quality of human capital is present, organisations may struggle to implement strategies and achieve targets. Analysing the areas where capability needs to be enhanced allows organisations to create a human capital investment strategy to support business objectives.
- Providing learning opportunities to staff enables them to develop and achieve personal and career goals.
- Well-planned training is an effective retention strategy, particularly for ambitious and externally mobile employees.
- All training provision should be designed to meet previously identified learning needs in order to be cost-effective. If an initial assessment using the correct assumptions is made about who needs to learn what, then it is likely that effective training or learning provision will result.
- Having a clear idea of what needs to be learned and the outcomes expected provides a foundation for training and learning professionals to evaluate the effectiveness of implementation of the learning strategy.

When to undertake training needs analysis

TNA can be undertaken at a number of levels.

- **For the organisation as a whole** - usually undertaken by the Learning and Development (L&D) team or the HR department. The aim is to understand the amount and types of learning that will be needed to ensure that all employees have the right knowledge, skills and attitudes to perform the jobs they do. Ultimately such a survey is ensuring that the skills will be available for the organisation to meet its strategic objectives, and may cover the short-term (within a year) or look to the longer term in order to ensure the supply of the right skills at points in the future. The latter may be very important if human capital needs are going to be changing with business circumstances, if it will take several years to either recruit people with the right skills, or develop existing employees' skills and knowledge to the level required in the future. Such an analysis may also investigate the alternative routes of deciding whether to buy in talent (if it is available) or grow the capabilities of those currently employed.

- **For a specific department, project or area of work**. These may be one-off projects, where a change or a new way of working, or a reorganisation necessitates changes in the jobs people do. Research will have to be carried out on what demands the new or changed jobs will make and any gaps identified between employees' current skills and the skills needed to meet the new demands. Even if no radical changes are planned senior managers expect their business partners to continuously analyse and update the requirements for learning in their areas of responsibility.

- **For the individual** - often this will take place at appraisal with the employee and their line manager. Needs may cover enhancing skills to improve performance on the current job, to deal with forthcoming changes, or developmental needs that will enable the individual to progress their career.

There is a need for L&D/HR to ensure that analyses at these three levels are considered in conjunction with one another. One effective way of doing this is via a two way dialogue with managers when information is being sought for a TNA, and when the results of the analysis are   communicated.

In some organisations an organisational level analysis is only undertaken for particular reasons, for example, a change in overall business, HR or learning strategy, or when key leaders change. In others it can be an annual process or updating. At a departmental level, L&D may initiate the process when they feel that training or learning provision may have moved out of alignment with business strategy, or when major change is being planned. For individuals, the review of current skills and learning needs often is planned into the performance management or appraisal process. See our factsheets on performance management and performance appraisal for more information.

Knowledge, skills and attitudes versus competences

Knowing what jobs will be done, now and in the future is the first step. Then comes the more detailed analytical process for each category of employees covered:

- What capabilities will be required to carry out the job? (the person specification)
- What capabilities do existing employees possess? (a formal or informal skills analysis)
- What are the gaps between existing capabilities and the new requirements? (the learning specification).

Capability analysis

Training professionals have used a breakdown of capabilities into 'knowledge, skills, attitude' as a convenient shorthand for analysing needs, and it is a useful way to ensure that no

requirements are missed. For example, in looking at the requirements for competence in a project manager:

- Knowledge elements might cover the nature of the projects managed, techniques of project management, and possibly the system used to manage projects in that part of your organisation.
- You would expect high levels of skill in dealing with other people, managing the project team, and perhaps influencing senior managers or important stakeholders.
- You might also look for some attitudinal requirements such as attention to detail, and drive or persistence, to overcome obstacles or to see the project through.

However, the development of competency frameworks has overtaken this in many organisations, and these provide more detailed structures for looking at job requirements – see our factsheet on competency and competency frameworks for more information.

The task then becomes one of comparing current and new roles with the demands set out in your organisation's framework, or against generic frameworks. Where current employees' capabilities have also been matched against a framework, then it becomes easier to identify the   gaps.

'Attitudes' or motivation, or personal interests are very important inputs to the TNA. For example the AMO theory of Appelbaum et al1 states that performance is a function of employees' Ability, Motivation and Opportunity to participate. Where changes impact adversely on individual motivation, or, for example, involve the breaking up of existing teams, then some of the plans set after the TNA may include organisational development interventions to investigate people's issues and find ways of realigning their views with the organisation's   objectives.

Either the three categories or your organisation's competency framework are needed to ensure that when new jobs are created, existing ones are changed, and new people recruited, a full comparison is made between current capabilities and job demands.

How to plan a TNA

The collection of information is an instrumental and indispensable part of any TNA. For an organisational or a departmental analysis, the following table gives some types of data may need to be collected.

Type of data	What to include
Business objectives	What is required in terms of outputs, levels of customer service, interactions with other parts of the organisation, etc. How these are measured. What is going to change?
Technology and organisation of work	How jobs are done now, in terms of organisation and resources available. What technologies do people use, and how this might change. Changes may also be planned in terms of numbers of people to carry out the targeted performance or in terms of the way they are supervised or managed.
Employee demographics	Who is currently employed in the area you are analysing. Whether numbers are increasing or decreasing, who is joining and leaving. What categories of employees are included.
Education / qualifications	Basic education, vocational or academic qualifications which can be linked to assumptions about people's

	expectations around learning provision, cognitive or thinking abilities, as well as their level of current skills and knowledge.
Past experience	What previous knowledge, skills, and behaviours have been expected in the past, and are required currently. This may be linked to the organisation's competence framework. Experience of past training interventions.
Job roles / responsibilities	What individuals are doing at the moment, and what implications any changes will have for their roles.
Current competence	Current performance levels of individuals and teams, and any areas where competence needs to increase. This can be measured against both current and changed roles.
Employee status	Are people full or part-time, permanent or temporary, fixed contract or short-term contract?
Location	Where people are located in terms of geographical dispersion and access to training provision.
Length of time in job	The length of time people have spent in their current role might have an important bearing when it comes to meeting any identified training needs.
Employee attitudes and culture	How employees feel about change that is going on and whether they see it as opportunity or threat. How this will affect their willingness to learn and acquire new skills. Whether the organisation wants to change attitudes, for example in the way customers are treated, or to focus on particular performance standards.

In deciding what types of data need collecting, it helps to rule out those which won't or aren't likely to be relevant and then 'go' with the rest. In terms of relevance, it is essentially a question of looking at why the TNA is being undertaken in the first place, the range of job holders involved, and the number of people that will be included. If there is change, this may include an examination of all groups of employees who may be impacted, directly or indirectly.

How to carry out a TNA

Having planned the extent of the analysis, including the types of data which will need to be collected, the next stage is to decide how the information required can be collected. Some possible ways of collecting data are:

- documentation – for example business plans, objectives and new work standards, job descriptions and person specifications
- interviews with line managers - these will often be primary sources of information on plans, work organisation and changes, or will

expand on the facts available in the documentation.
- interviews, questionnaires, or surveys of managers, employees and their representatives
- existing data, for example on an HR database
- existing competence frameworks and analysis of levels of competence achieved
- appraisal and performance management documentation.

Confidentiality and sensitivity

Much of this data will be sensitive, particularly where knowledge and skills gaps are exposed for individuals, so their needs have to be respected. In addition, there are often times when major change is planned from which learning needs will arise, and senior management wish to keep the plans secret. In these situations, the learning professionals may need to convince senior management that they will need to gather data in order to plan timely interventions that will contribute to the success of the initiative, and that this can be done in a way that maintains confidentiality.

TNA for individuals

Line managers and their staff may be guided to look at individual needs for learning and training at the time of performance appraisal. Sometimes this may be done by comparing the level of competence achieved by the individual against the organisation's competence framework. Even if this level of structure is not available, then a statement of what the individual needs to learn in terms of new knowledge, enhanced skills and changes in attitude is prepared at appraisal time and may be built into a personal development plan.
Line managers need training to carry out effective appraisals and to identify needs – CIPD members can use our activities for improving appraisal skills. There is also a case study on our website looking at the approach taken by TNT UK Ltd, the express and logistics delivery service.
- Go to our member-only training activities
- Go to the TNT case study
Effective liaison with a business partner can also help the process and provide L&D with the information on the individuals' needs. This process may be more difficult when an individual seeks more long-term career advice, or has aspirations outside of their current function. Again, a close liaison between L&D and the line managers can overcome these issues.

How to use the results of the analysis

Collating the information from the TNA will allow a number of outputs:

- **A report of overall training needs for the organisation or department.** This may be a formal document that will form the basis of discussions on training and learning policy, or be part of the business planning process. It will also be part of the process of

budgeting for investment in learning and training, and a tool in the hands of L&D to bid for the resources needed to devote to learning to support business objectives.

- **Prioritisation of the learning needs identified**. Not all of the gaps in knowledge, skills and attitudes will be urgent, able to be filled in a short-term timescale, or within the resources the organisation is prepared to devote to learning. Debate with senior management will give guidance on which gaps are most critical. It is here that concentration on learning outcomes is important – once there is agreement about the learning that has priority, then training and learning professionals can start to work out how that learning can be facilitated – via formal training interventions or other means – and start to budget the time and resource that will be needed.

- **Learning and training plans**. Once priorities and budgets are set, the L&D team will be able to set plans for learning interventions. These plans will prioritise what needs to be learnt and the most appropriate methods including both formal and informal training and other learning processes to be implemented. Line managers will also have a clear idea of where they need to coach or develop skills in their teams.

- **Personal development plans**. Plans for personal learning can be aligned with the resources available and implemented in line with the organisation's and departmental priorities.

All these outputs will need to be discussed and agreed with the stakeholders concerned – most obviously senior management, and managers of the people covered by the TNA.

References

1. APPELBAUM et al (2000) *Manufacturing advantage: why high performance work systems pay off*. Ithaca: Cornell University Press.

Further reading

CIPD members can use our Advanced Search to find additional Library resources on this topic.

- Go to Advanced Search

BEE, F. and BEE, R. (2003) *Learning needs analysis and evaluation*. 2nd ed. London: Chartered Institute of Personnel and Development.

This factsheet was written by Jennifer Taylor, an independent consultant and researcher and Principal of Further Developments Ltd.

DEVONSHIRE
HOTELS & RESTAURANTS

Performance Review

Name: Position:

Department: Date:

1. Review individual performance generally in each of the key areas of responsibility over the last 6 months.

Performance: 1 = below expectations   6 = exceeds expectations

Key Area of Responsibility	Comments *Targets compared to actual, examples of good/bad performance.*	Performance Rating 1-6
Safety		
Team		
Customer CHAMPE		
Sales		
Profit		

What I have enjoyed
What could have been better
How it could have been made better
The successes I have had
The difficulties I have faced
What I could have done differently / Steps I can take to improve

2. Set and SMART objectives to be achieved over the next 6 months. Ensure that individual objectives are in line with departmental targets and the overall business plan.

SMART objectives: *Specific, Measurable, Agreed, Realistic, Timely*

What is to be achieved and by when?	How will it be measured?	What actions / resources are needed for completion?
Safety		
Team		
Customer (CHAMPE)		
Sales		
Profit		

What training and development objectives I need to help me to achieve my targets.

What I would like my manager to start doing.

What I would like my manager to continue doing.

What I would like my manager to stop doing.

3. Summary

Performance Summary		1 = below expectations		6 = exceeds expectations	
1	2	3	4	5	6

Manager Comments

Employee Comments

Appraisal Conducted By:

Name _____

Position _____

Signed _____

Employee:

Signature _____

Date of Next Review

_____
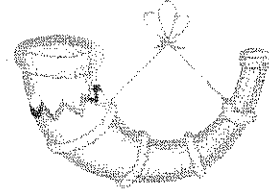
Performance Management
Annual Review Statement

Date of Review Meeting: _____

Member of Staff: _____   Team Leader: _____

Objectives	Met (✓)	Further Development (✓)
1. (Pupil Progress)		

2.

3.

Areas of particular strength (specify)

Areas to be developed

Support and resources to be provided by school (specify)

Staff comment (optional)

The content of this record has been agreed by:

Member of staff _____ Team Leader _____

Date of receipt of the completed review statement: _____

Performance Management
Planning Record Sheet

Date of planning meeting: _____

Member of Staff: _____ Team Leader: _____

Objectives
1. (Pupil Progress) To.....

How .....

Success .....

2.

How .....

Success .....

3.

How .....

Success .....

Development and Training Needs

Support and resources to be provided by school (specify)

Staff comment (optional)

The content of this record has been agreed by:

Member of staff _____(signature) Team Leader _____(signature)

Date of receipt of the completed planning statement _____

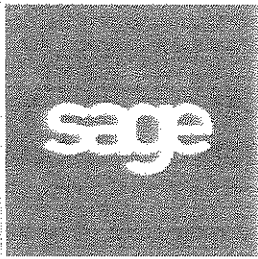Search Considering Sage only ☐ | Search this site |

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▸ Sage Instant Accounts Day 2
▸ Sage Instant Accounts Day 3

Introduction to Bookkeeping

1 day course

Course Overview
This course explains everything you need to know about basic double-entry bookkeeping. Debits and credits, the Nominal Ledger and the Trial Balance are some of the key topics covered.

Who Should Attend
This course is suitable for any individual that requires an understanding of double-entry bookkeeping.

Course Contents
Introduction to categories
Theory
Basic Postings and Trial Balance
Vat Recording
The Sales Ledger
The Purchase Ledger
Management Reports
Computerised Bookkeeping

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The building stands in the prestigious City Square, overlooking Park Row, and is right opposite the mainline station. This is the very heart of Leeds' business district. Therefore, there are plenty of major hotel chains located in the vicinity of the training centre.

Directions by Road

Leave the M621 at Junction J3/J4 and go straight ahead into A653 (Dewsbury Road) direction Holbeck, Central Leeds (for 1 mile)

Continue straight onto Neville Street (for 476 yards)

Bear left onto Bishopsgate Street (for 118 yards)

Continue straight onto Wellington Street for (43 yards)

Bear right onto Quebec Street (for 212 yards)

Turn right onto East Parade (for 63 yards)

Turn right onto Infirmary Street/Cloth Hall Court (for 153 yards)

Continue straight onto Infirmary Street (for 63 yards)

Continue straight onto City Square.

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Classroom Training

Training Price List

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SAGE INSTANT		
Sage Instant Accounts Day 1	1	£195
Sage Instant Accounts Day 2	1	£195
Sage Instant Accounts Day 3	1	£195
SAGE LINE 50		
Sage Line 50 Setup Course	1	£245
Sage Line 50 Stage 1	2	£490
Sage Line 50 Stage 2	2	£490
Sage Line 50 Stage 3	2	£490
Linking Sage L50 to MS Office	1	£245
Sage Line 50 Upgrade Workshop	1	£245
Sage Line 50 Project Costing	1	£245
SAGE PAYROLL		
Sage Payroll Stage 1	1	£245
Sage Payroll Stage 2	2	£490
Sage Payroll Report Design	1	£245
Payroll 1/2 Day Workshop (1 Day taken when booked using a passport)	1/2 Day	£175
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Bookkeeping Stage 2 (v12)	£35
Sage Instant Accounts	£35
Sage Line 50 Stage 1 (v12)	£55

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Privacy & Complying with the Data Protection Act e-Learning Course

All businesses hold information about people, including information on employees, customers and prospects. As a result of the Data Protection Act, which became Law in 2000, there are very strict rules governing how you must deal with this data.

Anybody who has access to any personal information on any other living individual is affected by these laws and any manager who fails in his duty as detailed by the Act can be held personally liable, face criminal prosecution and a fine of up to £5000.

This training course, developed and delivered by one of the leading technology lawyers in the UK, deals with a complex and important area of law in a straightforward way.
Delegates should leave this course with a clear understanding of how the Act impacts their role and business and with an action plan to enable their business to comply with the Law.

For further information on our e-learning courses contact our e-learning team now.

e-Learning or classroom based training

In addition to this classroom based training on Data Protection, Academy Internet offers a self paced e-learning course developed in conjunction with East Sussex County Council. Click here to view a demonstration of the e-learning.

Who Will Benefit?

Any staff responsible for handling or management of information about people including employees, clients and prospects: Personnel or Human Resources staff, IT managers, Marketing and Sales Managers and Directors, E-Business and E-Commerce Managers, Consultants and In-Company Lawyers.

Learning Objectives

This course will help you to minimise the risks to your business from unforeseen legal problems concerning privacy and data protection. You will become aware of all the key issues concerning data protection and more importantly, how it affects your business. Subsequently, you will be taught how to deal with these factors, and any future issues that you or your business may face. You will leave with an action plan for you to implement, which will enable your business to move towards compliance with the Data Protection Act.

Meet Your Trainer

Your trainer for this course will be Justin Ellis.

Course Content

Introduction to the Data Protection Act 1998

- When does the Act apply and what exemptions are available?
- What are a data controller's general obligations?
  - The 8 Data Protection Principles
  - Processed Fairly and lawfully

- o   Obtained and used only for specified and lawful purposes
- o   Adequate, relevant and not excessive
- o   Accurate, and where necessary, kept up to date
- o   Kept for no longer than necessary
- o   Processed in accordance with the individual rights as defined
- o   Kept secure
- o   Transferred only to countries that offer adequate data protection

Enforcement and Compliance

- What are the consequences of a breach of the Act?
- When can individuals be liable for their employer's breach?

Individuals' Rights under the Act

- How can an individual object to your activities?
- The subject access right

Employees / Employers

- What obligations/rights should they be aware of
- What obligations/rights do the Directors AND the company have?
- How does data protection law apply to information about your employees?

Subject access requests

- What do they cover?
- Minimising the burden

Marketing

- Consent and fair obtaining
- Information passing to and from other parties
- Specific Regulations

Passing Data Overseas

- General Prohibition
- How to get around it

Miscellaneous issues

- CCTV
- Monitoring Communications
- Business Transfers
- Outsourcing
- Associated Legislation - Telecommunications & Direct Marketing Regulations

(Contenet unknown)

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Oxford Cambridge and RSA Examinations

OCR

OCR LEVELS 2 AND 3 NVQ IN
CUSTOMER SERVICE

NVQ

Information Brief

CUSTOMER SERVICE LEVELS 2 AND 3

OCR is the awarding body established by the University of Cambridge Local Examinations Syndicate and RSA Examinations Board. OCR provides a full range of vocational and academic qualifications.

OCR provides a comprehensive range of resources, advisory and support services to enable centres to offer Customer Service NVQs

* Recording documents for centres

* Guidance on delivery, assessment and verification of qualifications

* Advisory visits

* Evaluation of centres

* External verification

* Registration and certification of candidates

* Regular updates on developments

* Presentations and workshops

CUSTOMER SERVICE NVQS

Level 2

This NVQ is aimed at individuals who have to deliver a continually improving service to customers, but who may not have the responsibility or autonomy to bring about permanent improvements themselves.

It is suitable for candidates:
* whose opportunities to influence what happens at work are limited

* who work within the rules and regulations of their organisation

* who work with others to overcome problems and to support customer service improvements

* who need to communicate in a clear, confident way

* who have a developing knowledge about their organisation's products and services.

Level 3

This NVQ is aimed at candidates who are in work roles where they have to provide a continually improving service to customers and are able to effect permanent improvements for the benefit of customers and the organisation.

It is suitable for candidates:

* who are able to suggest and help implement changes to improve customer service

* who are experienced problem solvers who can communicate clearly

* who have particular customer service job titles, such as customer service adviser

* who are in designated customer service departments

* whose role is mainly to provide service to customers, for example, call centre/hotel staff or

* who recognise customer service is a part of their role within the organisation even though they may be carrying out non-customer service roles, such as engineers.

INSTITUTE OF CUSTOMER SERVICE (ICS)

The Institute of Customer Service (ICS) recognises that business growth depends on investing in human resources in order to compete and succeed. OCR offers the Level 2 and 3 Customer Service NVQs to help employers and employees to achieve and demonstrate total quality as part of a continuous customer service improvement programme.

The Institute of Customer Service includes representatives from industry and the public sector organisations. The ICS developed the National Occupational Standards, upon which these NVQs were based, by seeking feedback from a wide range of organisations.

The NVQ structure

NVQs have flexible structures, which allow candidates to gain recognition for the skills required in their job role.

Where training needs are identified these can be addressed at work through college/training centre arrangements.

* Credit can be gained for past achievements where they can be related to the NVQ.

* NVQs assess knowledge and understanding but also measure a candidate's performance in the real work environment.

NVQs are based on National Occupational Standards, which describe what is required of the candidates in very precise detail.

The Benefits of Customer Service NVQs

Employees will benefit from:

* A clearer understanding of their responsibility within their organisation

* The opportunity to develop new skills

* The recognition of existing skills

Employers will benefit from:

* Improved staff performance and motivation

* Improvements in the quality of service to customers

* The opportunity to improve customer retention levels

Centres

Organisations wishing to offer the Customer Service NVQs can either apply to OCR to become a registered centre (if they can provide the appropriate Internal Verifiers and Assessors) or work with an existing centre to assess the NVQ.

Candidates

If you wish to become a candidate for the NVQ you need to register with an OCR approved centre. Once you have registered with a centre they will provide guidance and support on your route to achieving your qualification.

Information on approved centres can be obtained by ringing OCR's Information Bureau on 024 76 470033.

Assessors and Internal Verifiers

Assessors and Internal Verifiers require the following:

* Relevant and credible customer service experience across the level and breadth of the standards and NVQs

* A thorough understanding of the national occupational standards for customer service with the ability to interpret them within the environment and sectors they are assessing/verifying

* Experience and a working knowledge of the operational and assessment processes specifically for Customer Service NVQs

* High levels of communication and interpersonal skills

* Knowledge of current customer service practice and emerging issues in the customer service arena

* Knowledge of current practice and emerging issues in the vocational qualification area

* The relevant Training and Development Units ie: D32 and/or D33 for Assessors. D34 for Internal Verifiers (more information on Assessor and Internal Verifier requirements can be found in the Customer Service Level 2 and 3 combined Scheme Book/CAR).

What do I do next?

* Contact our Information Bureau for further information on 024 76 470033 or email cib@ocr.org.uk.

offer any of OCR's qualifications. For further information on any of OCR's qualifications, products and services contact the OCR Information Bureau or visit our website at www.ocr.org.uk.

Other qualifications offered by OCR which may be of interest to you, include:

Administration NVQs at Levels 1, 2, 3 & 4
Information Technology Levels 1, 2, 3 & 4
Call Handling NVQs Levels 2, 3 & 4

Further details and Information Briefs are available from the OCR Information Bureau.

- The OCR fees booklet (A250), which includes charges for centre evaluation, candidate registration and certification, is available from the OCR Information Bureau.

- A combined Scheme Book/CAR containing the standards and guidance on implementation of the NVQ is available to purchase, from OCR Publications (0870 870 6622)

- The leaflet Becoming an NVQ Centre: Steps to Implementation (N61) will be useful to organisations considering applying to OCR to become a centre.

- Full details of how to apply are given in Notes for Guidance (L526) which is included in the Centre Approval Pack, which is available from Operations in Coventry.

There is a range of support available to centres considering seeking approval to

OCR LEVEL 2 NVQ IN CUSTOMER SERVICE (QCA NO: Q1053818)

To achieve a full award the candidate must complete 4 mandatory units plus 1 optional unit, a total of 5 units.

OCR Unit No	Title	QCA Unit No.
Mandatory Units		
1	Give customers a positive impression of yourself and your organisation	U1053838
2	Deliver reliable customer service	U1053839
3	Develop customer relationships	U1053840
4	Resolve customer service problems	U1053841
Optional Units		
5	Support customer service improvements	U1053842
6	Develop personal performance through delivering customer service	U1053843
7	Promote additional products or services to customers	U1053844
8	Process customer service information	U1053845

OCR LEVEL 3 NVQ IN CUSTOMER SERVICE (QCA NO: Q1053819)

To achieve a full award, candidates must complete five mandatory units plus one optional unit, making a total of six units.

OCR Unit No	Title	QCA Unit No.
Mandatory Units		
1	Organise, deliver and maintain reliable customer service	U1053846
2	Improve the customer relationship	U1053847
3	Work with others to improve customer service	U1053850
4	Monitor and solve customer service problems	U1053851
5	Promote continuous improvement	U1053852
Optional Units		
6	Develop your own and others' customer service skills	U1053853
7	Organise and promote products or services to customers	U1053854
8	Lead the work of teams and individuals to improve customer service	U1053855

OCR (Oxford Cambridge and RSA Examinations)
Progress House
Westwood Way
Westwood Business Park
Coventry
CV4 8JQ

OCR Information Bureau

(Vocational Qualifications)
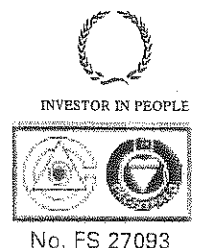Telephone: 024 76 470033
Facsimile: 024 76 421944
Email: cib@ocr.org.uk

www.ocr.org.uk

INVESTOR IN PEOPLE

No. FS 27093

N953/0107/A854/0801/8K

Shipley College

Customer Services NVQ 2

Course Level	Level 2
Who is this for?	This is a nationally recognised qualification for people wol customer services. You work at your own pace, building a evidence which is assessed on an ongoing basis.
How long?	Flexible. Start dates are available throughout the year.
What do I need?	You must work in a suitable customer service environment your employer's agreement to work place visits by the Ass
What will I do?	Each of these workshops provides :
Units	- Tutor support - Skills development - Work related accreditation
Costs	Please note - if your employer cannot provide a work-base for NVQs, there will be a charge of £240 for up to 8 hours provided by the College.
Additional Info	Admission by interview only - phone (01274) 327281 for i and to receive more information.
Contact Email	enquiries@shipley.ac.uk
Location	Shipley College - Salt Building
Times	5.30pm to 7.30pm
Start Date	14 September 2006
Days	Thursday

Go Back

Click to Apply

OCR

NVQs in Customer Service

www.ocr.org.uk

What are these qualifications?

OCR's NVQs in Customer Service are work-related qualifications available at three different levels. They are for people whose work involves some aspect of customer service.

Who can take these qualifications?

These NVQs are suitable for anyone whose job includes working in a customer service environment or working directly with customers. No previous qualifications or education is necessary; the sole requirement is relevant current work experience.

What are the benefits of taking these qualifications?

OCR's NVQs in Customer Service have been developed to recognise and reflect a candidate's work. Each level of the qualifications recognises a candidate's competence and ability in their everyday work and covers a diverse range of tasks and functions that are part of customer service.

How do these qualifications improve career prospects?

The NVQs are a formal recognition of an employee's work skills and abilities.

What does taking the NVQ involve?

The first step is deciding which level to take. An assessor advises candidates, taking into account what they can already do and what they are aiming for. Together, the assessor and candidate work out the best mix of training, assessment and observation to fulfil all the requirements of the NVQ.

There are no exams for an NVQ; instead, candidates collect evidence during the course of their normal work.

How is the qualification organised?

The four themes are the same across all levels. They are:

- Impression and image
- Delivery
- Handling problems
- Development and improvement.

For more information visit the OCR website at www.ocr.org.uk or contact the OCR Customer Contact Centre on 024 76 851509 or email vocational.qualifications@ocr.org.uk

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www.ocr.org.uk

OCR customer contact centre

Vocational qualifications
Telephone 024 76 851509
Facsimile 024 76 421944
Email vocational.qualifications@ocr.org.uk

General qualifications
Telephone 01223 553998
Facsimile 01223 552627
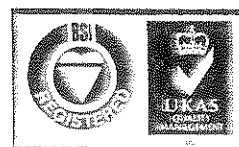Email general.qualifications@ocr.org.uk

OCR
1 Hills Road, Cambridge CB1 2EU
Telephone 01223 552552
Facsimile 01223 553377

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FS 27080

OCR

OCR LEVEL 3 CERTIFICATE IN
CUSTOMER SERVICE

Mandatory Units

Unit 1 – The principles of customer service

Unit 2 – Customer service standards

Unit 3 – Customer service legislation and regulation

Unit 4 – Handling complex customer service transactions

INTRODUCTION

The **OCR Level 3 Certificate in Customer Service** has been developed to recognise candidates' understanding of customer service when dealing with complex and non-routine customer service issues. The qualification provides accreditation for the full breadth of essential knowledge and understanding that would be needed by a competent employee functioning in a customer service role.

Specifically this qualification is suitable for those who:

- are already experienced in a job involving customer service and wish to update their knowledge, understanding and skills to improve their customer service performance

- wish to develop their full potential and/or the potential of others to deliver and improve customer service

- are seeking career progression through jobs involving customer service

- are undertaking, or preparing to undertake, the Level 3 NVQ in Customer Service (either as part of the Advanced Modern Apprenticeship in Customer Service or on its own)

- wish to add to a personal portfolio of qualifications that may lead to acceptance on higher education courses.

It will also be suitable for those who are studying in preparation for employment in job roles where they will be expected to work autonomously in carrying out activities with a significant customer service focus.

The **OCR Level 3 Certificate in Customer Service** is a qualification accredited by QCA to the National Qualifications Framework.

Unit 1 The principles of customer service
Candidates demonstrate an understanding of the central principles of customer service and how these principles are affected by systems, behaviour and the aims of the organisation.

Unit 2 Customer service standards
Candidates demonstrate understanding of the factors that affect customer service standards, sector codes of practice and ethical standards and the way that these influence the delivery of customer service.

Unit 3 Customer service legislation and regulation
Candidates demonstrate an awareness of legislation and regulation relating to customer service.
Candidates understand the impact that legislation and regulations have on customer service delivery.

Unit 4 Handling complex customer service transactions
Candidates demonstrate the ability to communicate effectively in complex complex customer service situations, have an understanding of the key steps in customer service transactions and an ability to deal effectively with difficult customers.

APPROVAL AND FUNDING

The **OCR Level 3 Certificate in Customer Service** is accredited at Level 3 of the National Qualifications Framework and is eligible for funding in 2003/4 under the Learning and Skills Council's Section 96 arrangements for learners of all ages.

QUALIFICATION STRUCTURE

Candidates can be entered for the **OCR Level 3 Certificate in Customer Service** in a variety of ways:

* **For the full qualification**
* **For an individual unit**

For the **full qualification**, candidates **must** achieve all **four mandatory units.**

For **candidates attempting individual units,** unit achievement will be individually certificated.

FORM OF ASSESSMENT

Unit 1 - The principles of customer service
Unit 2 - Customer service standards
Unit 4 – Handling complex customer service transactions
These units are centre assessed and externally moderated by OCR. These units are graded: Pass, Fail.

Unit 3 – Customer service legislation and regulation
This unit is assessed by examinations which are held at set times during the year. These are externally set and marked by OCR. Results for this unit are graded: Pass, Fail.

All examination tasks and assessment tasks allow candidates to demonstrate their knowledge and understanding in a format that is both logical and realistic.

Full award certificates will be graded: Pass, Fail.

PROGRESSION ROUTES AND THE NATIONAL QUALIFICATIONS FRAMEWORK

Candidates who wish to further develop their knowledge and understanding at Level 3 and who wish to demonstrate their competence in a work-based context will be able to progress to the Level 3 NVQ in Customer Service.

A programme of study based on this qualification will enable candidates to progress to other qualifications where customer service is a key component, such as qualifications in call handling, retail, sales, administration and other business-related qualifications.

QUALIFICATION SUPPORT

The **Tutor's Handbook** offers Centres a comprehensive guide to the structure and administration of the qualification.

OCR's **website, www.ocr.org.uk,** contains all the most up-to-date and relevant information about the qualification. This includes the qualification specification including sample assessment materials.

OCR **runs a regular programme of training workshops** for tutors to help Centres maintain best practice in their delivery of this qualification. For more details contact OCR Training on 0121 628 2950.

If in doubt over any aspect of the specification, **assessment or administration** for this qualification, please contact OCR's Information Bureau in Coventry where staff will help. Telephone 024 76 851509.

FEES

Centre approval	Free
Candidate entry fee: Full award Single unit	Please refer to the current edition of the OCR fees booklet.*

*Fees change in September

GETTING STARTED

Simply complete the attached Centre Approval Form and return it to OCR Operations in Coventry. There is no fee for Centre approval.

In return, you will receive the Tutor's Handbook and details on administration.

WHAT IS THE NATIONAL QUALIFICATIONS FRAMEWORK?

The National Qualifications Framework is the framework into which all QCA accredited qualifications will fit. The framework has six levels and three categories for types of qualification. For the first time, there will be a national framework that clarifies the relationship between different types of qualification. The three categories of qualifications are general, vocationally-related and occupational.

	General	Vocationally-related	Occupational
Level 5			NVQ Level 5
Level 4			NVQ Level 4
Level 3	AS/A Levels AEAs	VCEs, OCR Vocational Qualifications including **OCR Level 3 Certificate in Customer Service**	NVQ Level 3 **NVQ Customer Service Level 3**
Level 2	GCSE (Grades A*–C)	Intermediate GNVQs, Vocational GCSEs (Grades A*–C), or OCR Vocational Qualifications including **OCR Level 2 Certificate in Customer Service**	NVQ Level 2 **NVQ Customer Service Level 2**
Level 1	GCSE (Grades D–G)	Foundation GNVQs, Vocational GCSEs (Grades D–G), OCR Vocational Qualifications	NVQ Level 1
Entry Level	Entry Level Certificates in both General and Vocationally-related Areas		
	> Increasing Occupational Focus >		

APPLICATION FOR APPROVAL AS A CENTRE FOR
OCR LEVEL 2 CERTIFICATE IN CUSTOMER SERVICE
OCR LEVEL 3 CERTIFICATE IN CUSTOMER SERVICE

Section A – Your organisation

Centre Number						Centre Name	
Centre Address							
						Postcode	
Telephone number				Fax number			

Details of the person who will be contact for the qualification	Name	
	Job Title	
	E-mail	

Please list any satellite Centres where this qualification will be delivered	
Address	Address

If you are currently approved as a Centre by other awarding bodies please list below up to three	
Awarding body	Type of Qualifications

Has your organisation had approval for a qualification refused or withdrawn by any awarding body in the last five years?				
	Yes		No	
If the answer is yes, please enter the name of the awarding body				

Please tick (✓) below against the qualification(s) you wish to offer		
Qualification Title	Scheme Code	✓
OCR Level 2 Certificate in Customer Service	03423	
OCR Level 3 Certificate in Customer Service	03424	

Signature of Principal or Head of Department	
Date	

Section B – Criteria for approval

Please provide the following information in the space provided or on a separate sheet

	Yes	No
Has your organisation been certificated under a formal external quality assurance system?		

Please give the names of the staff who will be involved in the delivery of this qualification, their positions, qualifications and experience. Please attach CVs if you wish.

Please give brief details of your organisation's staff development programme.

Please indicate how you will ensure consistency of assessment across all staff and all sites.

Please give details of security arrangements for examination materials.

Please give details of how you will maintain security in the event of an emergency eg a candidate taken ill during the examination.

	Yes		No	
For the examination candidates will be seated at least 1.25m apart. If NO (eg because of machine configurations) please explain how you will ensure candidates cannot communicate or see each other's work.				

	Yes	No
There will be at least one Invigilator per 30 candidates for assessment of examined units – Unit 1 (Level 2) and Unit 3 (Level 3).		

	Yes	No
Please confirm that you have in place the following which will be available for inspection by OCR if required:		
(a) a regularly monitored equal opportunities and access policy		
(b) a complaints procedure for candidates		
(c) a procedure for appeal against internal assessment		
(d) an effective management & administration system for this/these qualification(s)		

	Yes	No
Please confirm that staff and candidates will be made aware of the OCR results enquiries procedure.		

Please return to:
Vocational Operations, OCR, Progress House, Westwood Business Park, Westwood Way, Coventry, CV4 8JQ.

Changing employment laws

*Recent proposals on working time and family-friendly employment
have set the cat among the pigeons (again). Nancy Wall explains*

Early in the nineteenth century, before employment protection law existed, grossly inhumane employment practices were common. In some parts of the world, many people do still work in dangerous conditions, just to earn a wage.

In the European Union (EU), employees are generally well protected by the law. The principle of the **level playing field** is important here. If all businesses have to abide by the same regulations, they can compete on equal terms. By harmonising employment legislation, the EU ensures common standards in all member countries. The costs of meeting the regulations are the same for all.

Improving working conditions in the EU is a continuous process. During 2004, a number of new proposals were announced. But some of these are controversial. Particularly so are the Working Time Directive and the regulations relating to paternity and maternity leave.

The Working Time Directive

Regulations limit employees to working 48 hours per week, on average. At the moment, the UK has an opt-out arrangement. Employees can agree to work longer if they wish to. The European Commission is proposing to change this so that employers must negotiate the opt-outs with trade unions, rather than with individual employees. The employers' organisation, the Confederation of British Industry (CBI), is not happy about this. Although only one in five private sector employees belongs to a union, some business leaders think it may increase trade union power.

In the meantime, the commission and the UK government have been consulting extensively and have found many ways of making the Working Time Directive easier to manage. John Monks, head of the European Trade Union Confederation, thinks the commission has sided with the general employer offensive on working time. It is not yet clear what the full effects of the Working Time Directive will be in terms of reduced flexibility.

Maternity and paternity leave

In 2003, parents of young and disabled children were given the right to request **flexible** working arrangements. The CBI, which generally speaks for all businesses, did not oppose this. But the representatives of smaller businesses gave it a poor reception

and said the resulting increase in costs would be crippling.

Now there are proposals to extend paid maternity leave from 6 to 12 months and to raise paternity leave pay. This would take the rate from the present £102 per week to 90% of earnings (the rate for maternity leave). Also under review is a plan to extend the right to request flexible working to people who look after elderly relatives.

Again the CBI was calm, saying of the maternity leave proposal, 'it will not be impossible for employers to deal with this provided they know what the employee intends to do next'. Some small businesses saw it differently. An anonymous food wholesaler said, 'How can you run a business if somebody is not there? Often it takes 6 months just to train up

The right of parents with young children to request flexible working arrangements has received a mixed reception from businesses

temporary staff. I try not to employ too many people who give me that sort of problem but these days you are not allowed to discriminate.'

Why small businesses suffer more

Big businesses can spread the risks of a request for maternity leave and organise their working hours to fit in with the Working Time Directive relatively easily. Small businesses by their nature are sometimes much less flexible. There may be no-one to stand in for an absent key person. Fulfilling an urgent order may be difficult with a small workforce if working time is limited. Taking on an extra person to cope temporarily will raise costs. Sometimes this means a loss of profit, which reduces the incentives for the business. If it means charging higher prices, the business may lose competitiveness and face reduced sales.

Compliance costs

Complying with the law means you need to know about it. Here again, large businesses can cope by setting up a compliance department. They can employ people whose entire job is to be familiar with current legislation and the changes it requires. In a small business, the owner has to study the regulations in between doing many other things. Stephen Alambritis, spokesman for the Federation of Small Businesses, wants a moratorium on new employment legislation. He says:

The government has imposed 17 major pieces of new employment legislation since 1997. Owner-managers have to acquaint themselves with all of it, whereas a large

company would have a legal department to deal with it. The vast majority of business start-ups are now sole traders because they are worried about employment legislation. The average small business spends 30 hours a month dealing with red tape.

Flexible labour markets are important

The UK labour market is generally regarded as a **flexible** one, compared to those of many other EU countries (particularly Germany). Flexibility implies that managers can deploy their workers in the most efficient way possible. They can vary their hours to suit the work in hand. They can hire people for short periods if they need to, letting them go when a busy period comes to an end. Obviously, working like this helps employers to keep costs down, i.e. be competitive.

The flexibility of the UK labour market is sometimes given as an important reason why unemployment is generally lower in the UK than in other EU countries. Of course, keeping people in work is important and governments are proud if unemployment is low during their term of office. Is there a trade-off between keeping labour markets flexible and improving working conditions?

Work–life balance versus the flexible labour market

The Working Time Directive and family-friendly employment laws are all about having an appropriate work–life balance. We can all think of people who work long hours and see little of their families. Most people can also see the point of not making life too difficult for people with small businesses. From the EU point of view, businesses should be working towards allowing their employees to create an appropriate work–life balance in a harmonised way that keeps the playing field level.

Some small businesses do not oppose the recent changes in employment law. Some are proud of their family-friendly employment policies. They claim that, by taking good care of their employees, they secure their loyalty and have lower staff turnover rates and lower training costs. Take Innocent Drinks, the fruit smoothie maker, as an example. It gives each new parent on its staff a tax-free bonus of £2,000 towards the costs of the new baby. It routinely goes beyond the

legal requirements. It thinks that the motivating effect of this and its other innovative staff benefits far outweigh the extra costs entailed. The company is seen by its employees as an exceptionally good employer and this has produced a highly positive **corporate culture**.

Is there a conclusion?

There are many different perspectives on employment legislation. Big businesses usually cope with new **regulations**, although they may complain. Small businesses may despair, ground down by frustration and compliance costs. But a sizeable number of large and small businesses are unconcerned because their policies are at least as favourable to the employee as the minimum required by law. The whole issue of 'red tape' is a political football. So for you, the student, it is important to be aware of the range of perspectives and to understand how the impact of the legislation depends on the circumstances.

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