

**T Level Technical Qualification in
Management and Administration
(8715-32)**

**Team Leadership and Management
(312)**

**Guide Standard Exemplification
Materials
Pass – Sample 2022**

**First teaching from September 2022
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Introduction

The sample assessment materials within this document refers to the Team Leadership and Management sample occupational specialism assignment. The aim of these materials is to provide centres with examples of knowledge, skills and understanding that attests to minimal threshold competence. In this document all exemplar evidence attests as examples of a minimal threshold competence. It is important to note that in live assessments a candidate's performance is very likely to exhibit a spikey profile and standard of performance will vary across tasks. Minimal threshold competence will be based on a synoptic mark across all tasks.

Task

This section details the tasks that the candidate has been asked to carry out and all evidence required to be submitted for marking.

In this GSEM there is candidate evidence from all tasks in this assignment:

Task 1 – Research and Financial Analysis

Task 2 – Project Strategic Planning

Task 3 – Stakeholder Management

Task 4 – Leading and supporting the Team

Task 5 – Coaching and developing a team member

Task 6 – Managing a challenging conversation

Candidate evidence

This section includes exemplars of candidate work that illustrates threshold competence. This will be exemplar evidence that was captured as part of the assessment and then externally marked by City & Guilds.

Commentary

This section includes detailed comments to demonstrate how the candidate evidence attests to the standard of minimal threshold competence by directly correlating to the grade descriptors for this occupational area. Centres can compare the evidence against the performance indicators in the marking grid descriptors within the assessor packs, to provide guidance on the standard of knowledge, skills and understanding that need to be met for minimal threshold competence.

It is important to note that the commentary section is not part of the evidence or assessment but are evaluative statements on how and why that piece of evidence meets a particular standard.

Grade descriptors

To achieve a pass (threshold competence), a candidate will typically be able to:

Demonstrate an acceptable performance that meets the requirement of the brief, demonstrates the adequate technical skills and techniques for providing team leadership, such as leading, managing and developing teams and individuals, building relationships with key stakeholders and customers, and managing and implementing projects.

Demonstrate an acceptable ability to identify and interpret information from appropriate sources and makes use of appropriate information to make decisions to support team leadership activities.

Demonstrate an acceptable understanding of leadership styles. They will show adequate understanding and skills at using tools and techniques to demonstrate coaching skills. Demonstrate an acceptable use of project plans and data management tools in order to manage projects. An attempt is made to demonstrate breadth and depth of knowledge and understanding of project management approaches.

Complete relevant tasks and the level of performance meets an acceptable level.

Demonstrate understanding and skills to engage and communicate with stakeholders in order to build sound working relationships that lead to the acceptable planning and execution of a brief. Demonstrate the selection and use of communications and media that are suitable for the intended stakeholder engagement.

Select appropriate clear verbal and written communication methods.

Task 1

Research and Financial Analysis

For Task 1 candidates need to produce the following pieces of evidence:

- 1.1 SWOT Analysis
- 1.2 Written summary report
- 1.3 Forecasting budget
- 1.4 Written response that identifies the best option for the project and the business, including identification of the decision-making tool used

Candidate evidence

1.1 SWOT BestShoes Business

I have used a SWOT analysis which looks at internal strengths and weakness and external opportunities and threats which helps build information about the options for moving the business online.

Strengths <ul style="list-style-type: none">• Product quality• Good reputation• Good customer contact- One stop shopping approach• Popular with range of customers• Experienced team• Family business	Weaknesses <ul style="list-style-type: none">• Lacks range of shoes/products• Not much advertising• No social media• Small team• Loss of business due to falling sales• Old fashioned – little/no technology used• Little/No forward planning for future of business
Opportunities <ul style="list-style-type: none">• Larger markets• Company growth• Move online• New suppliers• Improve staff skills• Expand - new products• Expand – customer base• Social media	Threats <ul style="list-style-type: none">• Competition• IT skills/equipment• Economic• Lack of advertising/social media• Unknown markets• Government change• Legal impacts

1.2 Summary Report

This report is a summary of research into the options for moving the **BestShoes** business online in the most successful way.

Overview:

This report will include use of SWOT analysis and research and will look at the best option for **BestShoes** business and its move online.

Key Findings:

Research shows that although the footwear and leather goods retail sales had decreased in 2020, the biggest spend in this area was on shoes and other footwear. Data showed that sales numbers on shoes and other footwear increases every year in the UK, except for 2021 where sales were impacted by Covid. The biggest threats found from the research are the decline in the number of footwear retail stores and the growth of businesses online.

The SWOT analysis highlighted strengths and advantages for **BestShoes** in moving online, although some changes to staff and shifts will be needed to help run the business online successfully. The business will need to raise money to help buy the equipment and build on the skills of staff to help hit sales of £100,000.

The key point for BestShoes include:

- There will need to be changes to process the online orders - so increased customer knowledge, space and information are needed for staff to work well.
- There will need to be a spend on technology - increased technology to enable speed to meet customer needs and be competitive in terms of costing.
- Building relationships with customers are crucial, benefit from increased social media.
- New Supplier relationships – need a mix of new products to remain competitive online.
- Staff – need staff training to focus on product, delivery, and quality and there will be a need to train staff in the use of the new technology, processes.

Conclusion:

BestShoes needs to consider its marketing approach and likely costs before deciding to move online. They currently have a dedicated small team with good knowledge, but staff will need to be trained, and the business will need to invest in new technology to meet the business objectives.

Recommendations:

Although trading is currently hard, the opportunity for growth by taking the business online is worth it in the long-term to secure the future success of **BestShoes**. It will also take advantage of the existing skills and strengths of the business and its staff and expanding the supply chain network will expand customer bases and sales, increasing profits. It is important to conduct a cost summary for the three options will help with the decision making and help to identify risks.

1.3 Forecasting Budget

The tables show the costs associated with the three options. Option 1 Distributor, Option 2 Self-Managed Website, and Option 3 Hosted Website.

Option 1	Distributor Year 1		
	10% <50,000	8% >50,000	Total Cost £
Costs @ based on projected sales of £100,000	5000	4000	9000
Costs of Staff			
1 P/t Sales Assistant			8901.36
Cost of Postage			Inc
Projected number of sales			2500
Total Cost			17901.36

Option 2	Self-Managed Website Year 1			
	Webpage	Equipment	Postage (per item)	Total Costs £
Costs @ set up	5000	5000		10000
Costs of Staff				
1 F/T Shift Leader				23241.92
Cost of Postage per item	-	-		15000
Total Cost				48241.92

Option 3	Hosted Website				
	Cost of Set up Webpage	Cost per month	Cost of Equipment	Cost of packing & posting per item	Total £
Costs @ set up	20000	2000	5000	-	49000
Cost of Staff	-	-	-	-	8901.36
1 x P/T Sales Assistant					
Cost of packing & posting Postage	-	-	-	-	15000
Total Cost					72901.36

Here are the main things to think about in terms of staffing, set-up cost and managing the budget:

Staffing cost

- Additional shift work - changes to working practice, process, and shift patterns.
- Changes will need explaining in writing or verbal to give 7 days' notice to advise of any shift change.

Set-up cost –

- Cost must be monitored over time. The different types of costs are:
 - Fixed costs
 - Variable costs
 - Total costs

The main set-up costs identified with option one is Distributor costs which are based on percentage of sales and will drop once sales hit over £50K.

Budget control and monitoring

- Budget control involves reviewing at set periods and being aware of risks or issues that can lead to over or under-spending
- A budget report looking at current levels of spending against forecasted figures will help with monitoring and decision making and can help know that the company is heading in the right financial direction in the short and longer term.

Governance arrangements

Organisations should have a structure in place for financial rules, procedures, and regulations.

- Governance - have a clear budget process for spending and any changes to spend should be reported to the store manager. Any costs over £250 are to be signed off beforehand.
- **BestShoes** will need to consider wider areas such as fraud, theft, criminal activity, and tax. Any areas of concerns should be flagged immediately to the store manager.

1.4 Written response that identifies the best option for the project and the business

I have used a pros and cons matrix to help make decisions on the three options.

Option	PROS	CONS	Risk
Distributor	<ul style="list-style-type: none"> • Set up cost • Can use current staff - Training given to our staff • Technology – own systems used • Service quality maintained • Quick to introduce to our customers • Knowledge of system 	<ul style="list-style-type: none"> • Time to get staff used to process and changes • Lack of knowledge on technology and systems needed 	M
Self-Managed Website	<ul style="list-style-type: none"> • Less system changes • Cheaper set up cost • Product content managed by us • Training • Costs to maintain 	<ul style="list-style-type: none"> • Time to set up • Cost • Lack of expert knowledge • Amount of work needed to put all information on website • Update to technology 	H
Hosted Website	<ul style="list-style-type: none"> • Expert knowledge • Content put together for us • No cost to maintain • Quicker set up time 	<ul style="list-style-type: none"> • Time to set up • More expensive cost • Lack of control • Update to technology 	M

Based on the above information the decision is to choose **Option 1 – Distributor**, it is cheaper, they have the knowledge of systems to support the change to operating online so that will save time and money. Risk is considered in terms of Low, Medium, and High factors and Option 1 has fewer negatives.

I have chosen to email the Store Manager and Store Owner because it is quicker.

Email: Store Manager/Store Owner

Business Change Project

Hi Greta,

I have been researching into the different options available for the project of moving the business online.

BestShoes has a good reputation established with our customer base and we are a trusted and well-established family business. After looking into the three options, option 1, the Distributor is the best option for us to successfully move online and maintain this good reputation with our customers. The Distributor's resources and skills in the shoe industry would help support our move to online sales as well as widen our customer base.

In order to meet our sales target of £100,000 in the first year, we will need £9000 upfront to get the project running successfully. **BestShoes** already has a small team of knowledgeable staff and with some changes to work patterns this option can be easily achieved.

I would recommend considering our approach for marketing and use of social media which will help build up our customer base and image. **BestShoes** will also need to look at market trends to select the best products and help to build the product range.

This move will be positive for **BestShoes** as it will allow the business to move forward and secure its future in the long-term.

Magdalena Enrico

Team Leader Trainee

BestShoes

Family-run shoe specialist

Visit us at our website [here!](#)

References/Resource List

Footwear Sales Statistics in UK @ <https://www.statista.com/topics/5774/footwear-industry-in-the-united-kingdom-uk/>

SWOT – Mindtools @ <https://www.mindtools.com>

ACAS - Changing an employment contract. online access 05/01/2X
@<https://www.acas.org.uk/changing-an-employment-contract>

Budgeting – J K Batra (2018) Accounting and Finance for Non-finance Managers, Sage publishing.com

Report writing - Essay and report writing skills course @
<https://www.open.edu/openlearn/education-development/essay-and-report-writing-skills/content-section-0?active-tab=description-tab>

Commentary

The SWOT analysis identifies an acceptable overview of the factors that need to be considered within the context of BestShoes moving online. The candidate has identified points within each category of the SWOT. Points identified show an understanding of external and internal factors that may impact the project but do not expand into the broader range of potential opportunities or weaknesses associated with the move of the business online.

The written summary report developed provides an acceptable attempt at summarising the candidate's review and findings on moving the business online. The candidate has identified that the overall benefits of moving the business online are worthwhile. The candidate has made an adequate attempt at identifying some recommendations which are supported by research undertaken, to show their understanding of how to support the move of the business online.

The candidate has made an acceptable attempt to analyse costs associated with competing options for moving the business online with some consideration for staffing, set-up costs and budget control.

An attempt is made to utilise a decision-making tool in order to identify the most cost-effective option. There is some reasoning evident for why the identified option offers the best return on investment with some links to the project brief that are not fully developed. For example, how the Distributor option offers prior knowledge of systems to support the move online to save time and money, that could be developed further to strengthen reasoning. The candidate presents an acceptable written summary that presents the identified option with some attempt made to gain buy-in.

Task 2

Project Strategic Planning

For Task 2 candidates need to produce the following pieces of evidence:

- 2.1 Strategic Project Plan
- 2.2 GANTT Chart
- 2.3 Risks and Issues Log
- 2.4 Presentation slides

Candidate evidence

2.1 Strategic Project Plan

From my analysis in Task 1, I have chosen the Distributor option as the most effective way of taking the business online.

I have been told that I have 12 months to get the business online and that I need to produce a strategic plan for the project. The plan will include SMART targets, tasks, timescales, resources, and costs for the project. I will also consider risks and issues that might affect the project being delivered on time.

Aim – To get the company up and running online within 12 months

SMART Objectives

- To have all systems in place to go live by end of 12 months
- New member of staff to be fully trained on the system
- Stockroom to be reorganised to suit business model.
- Social media advertising to promote opening and online service

Strategic Plan

Task	Timescale	Resources	Cost
Contract with distributor company	Month 1/2	Manager's time	£1,600
Purchase computers, software packages	Month 4	Computer hardware and software	£3000
Recruit new part time member of staff	Month 7 interviews Start month 8	Advertising Managers time to interview	£250 £150
Agree contract with builders	Month 1	Building company	£10,000
Building work on stockroom	Month 3-6	Building company	See above
Fitting of stockroom	Month 6-8	Furnishings	£3000
New stock in place in line with new business model	Month 10	Shoes etc.	Already accounted for in store budget, not part of the project.
Work with distributor to identify best methods of advertising	Month 9	Part of distributor service	
Decide on design and content of on-line sales	Month 11	Work with distributor to see what they require and to design generic content. templates	£1400
Advertise new online service	Month 11/12	Team Leader Trainee	

My plan has come in well under budget.

Key

SO = Store Owner

SM = Store Manager

TLT = Team Leader Trainee

STL = Shift Team Leader

NSM = New staff member

P/TSA = Part-time Sales Assistant

D = Distributor

2.3 Risks and Issues Log

Risk/Issue	Risk Level	Mitigation
Failure of IT system to service online orders	High	Install back-up system.
Staff not understanding new IT system	Low	Manager or Team Leader can take over and offer support to other staff members with training.
IT equipment develops a fault	High	Ensure that the business has IT support ready for the transition online to ensure sales aren't lost if IT equipment fails.
Building work not completed in time	High	Monitor the progress to make sure it is.
Staff sickness or absence	Medium	Make sure there are plans for staff cover in the event of sickness or absence.
Stock availability	Medium	Make sure we order early enough. Back-up plan to borrow from another shop.
Going over budget	High	Fill in all payments out and keep it up to date to track expenditure.

2.4 Presentation Slides

BESTSHOES GOES ONLINE

WHY ARE WE DOING THIS?

- Decline in sales
- Fewer customers
- Need to change or we will not survive or meet sales targets of £100,000 for next year

Our Aim – To get the company up and running online within 12 months

Our objectives are:

- To have all systems in place to go live by Month 12.
- New member of staff to be fully trained on the system.
- Stockroom to be reorganised to suit business model.
- Social media advertising to promote opening and online service.

Any questions?

THE PLAN AND MAJOR MILESTONES

- Month 2 - To contract a distributor.
- Month 3 - To identify the resources needed and purchase all essential items within budget.
- Month 9 - Undertake necessary changes to shop storage area to meet new requirements.
- Month 9 - Installation of new computer system and begin staff training.
- Month 11 - New stock purchased and in-store room labelled. Packaging machine in place.

Management will be monitoring at each monthly stage to see that the project is on track and work has been done.

MONITORING

Management monitoring meetings to include:

- Progress against timescale and contract
- Budget reporting
- Risk and issues identified and addressed

Staff meetings:

- Regular meetings to update on progress and get feedback from you as the team, encouraging your thoughts, opinions and participation
- Early identification of any problems/issues is valuable for staying on track

HOW WILL YOU BE INVOLVED?

- Team meetings where you will be updated on the plan
- Training will be offered when it is appropriate
- The manager will be around to answer any questions you may have throughout the project
- There will be some disruption in the shop, but this will only be for a few months
- Make sure shop customers know what we are planning

RISK/ISSUES LOG

Risk	Mitigation
Building work not completed in time	Monitor it to make sure it is
Staff sickness/absence	Make sure there is staff cover
IT equipment develops a fault	Ensure that the business has IT support ready for the transition online
Failure of IT system	Install back up system
Stock availability	Order early enough. See if we can borrow from another shop
Going over budget	Fill in all payments out and keep it up to date.
Staff not understanding new system	Manager or team leader can take over

THANKS FOR YOUR TIME

Commentary

The strategic project plan developed has an acceptable structure with some consideration of the range of key tasks, resources, and appropriate timescales in relation to transitioning BestShoes business online which could be further developed. The candidate has made an attempt to consider how SMART objectives can be used to support project planning.

The candidate has developed an acceptable GANTT chart to support project planning, with an attempt made to consider how project activities will be undertaken. Some appropriate timescales have been provided.

The risks and issues log is an acceptable example which details a range of risks and issues that may arise as part of delivering the project of moving BestShoes online. The candidate has made an attempt to indicate the risk level and provide a mitigation for each risk. The candidate has shown little differentiation between immediate risks as part of the project, and those which would be a longer-term consideration.

The presentation slides are of an acceptable standard which include details from the strategic project plan including some consideration of monitoring progress and risks. There is adequate level of consideration of the audience and how they will be engaged with the presentation. An attempt is made to detail how internal stakeholders will be involved.

Task 3

Stakeholder Management

For Task 3 candidates need to produce the following pieces of evidence:

- 3.1 Stakeholder map
- 3.2 Stakeholder engagement plan
- 3.3 Time-management plan

Candidate evidence

3.1 Stakeholder Map for BestShoes

With the intended change to business, working practices and procedures for **BestShoes**, the first step is to identify key stakeholders so that their needs can be considered.



Certain decisions made will affect and be of interest to many stakeholder groups, so it is important to consult and keep them informed.

3.2 Stakeholder Engagement Plan

To support and build engagement with stakeholders from the start to end of the project a stakeholder engagement plan has been put together which will be managed by the store manager and team leader.

Stakeholder	Area of interest	Stakeholder manager	Contact by
Local Community	Environmental/ Economic	1.Store Manager 2. Team Leader	Web pages, updates on Facebook, information
Owner	DATA, detail	1.Store Manager	Analysis & Reporting
Store Manager	Task/time/ budget	1.Store Manager	File sharing, task assignment, team diaries, team management
Customers	Marketing	1.Store Manager 2.Team Leader	Internet, Tweets, Facebook, website, surveys
Suppliers	Technology/ information	1.Store Manager 2.Team Leader	Formal consultations, discussion forums, reports
Team	Process/system	2.Team Leader	File sharing, team diaries, WhatsApp
Distributor	Data Technology	1.Store Manager 2. Team Leader	Formal consultations, discussion forums, reports

The communication approach and tools will vary depending on level of stakeholder influence but will include updates to engage stakeholders in important decisions, task assignment and team activities and budget checks. Customer polls will be done via internet and website.

This will help me to better manage time so that I can achieve objectives. If not managed properly the tasks will not get done and the project can fail, or my work is not completed on time which may cause things to overrun and impact on costs.

3.3 Time-management Plan

I plan to:

1. Prioritise project tasks that I need to do based on their importance and urgency, which I will do using an Eisenhower Grid.
2. Make a to-do list to help with planning my personal tasks/activities.

Time Management – Eisenhower Grid for Project

Urgent & Important <ul style="list-style-type: none"> • Planning meeting with SM/Owner to discuss product • Meeting with Suppliers • Meeting with Distributor 	Important <ul style="list-style-type: none"> • Prep for planning meeting with SM • Phone calls with suppliers • Meeting with BestShoes team • Research Distributors • Arrange training for staff
Not Urgent <ul style="list-style-type: none"> • End of quarter stock check 	Not important <ul style="list-style-type: none"> • Clearing emails • Reading trade association updates

Time Management –To Do List

I have assessed how I am going to plan, organise and prioritise my own time to cover project activities at the early stages and have included a simple TO DO list which shows the actions I need to do, these are also numbered to help me organise how urgent they are.

Action	Urgent/Important
Issue agenda to team ahead of staff meeting	1
Hold Staff Meeting	1
Prepare report for Store Manager	1
Management Monitoring Meeting – progress update	1
Research and contact Distributor companies	2
Request tenders for remodelling	2
Speak to contractors about rebuilding the stockroom	3
Look at options to lease or purchase computers or software	3

Commentary

The candidate has identified an acceptable range of stakeholders in response to the brief. The candidate has developed a stakeholder map that shows consideration for level of power and interest for each stakeholder group, but does not fully expand on the impact of this in the context of BestShoes moving online.

The candidate uses their map to develop a stakeholder engagement plan. An acceptable range of communication methods are identified and attributed to different stakeholder groups – with some recognition that different types of communication will be used by different groups. However, the response does not clearly articulate the reasons why the types of communications are considered best for the stakeholder groups identified.

The candidate has shown an understanding of two different time management techniques (Eisenhower grid, to do list). The candidate has acceptably shown how they would use these different techniques to manage their own time when managing the project to move the business online. The candidate makes a connection between the range of actions/tasks and a consideration of their priority when managing the project.

Task 4

Leading and supporting the Team

For Task 4 candidates need to produce the following pieces of evidence:

4.1 Team Meeting agenda

4.2 Email to team

4.3.1 Recording of Team Meeting*

4.3.2 Meeting minutes with clear actions

4.4 Reflection on leadership style to use with the team on the project

(* this evidence is presented here in the form of a **Practical Observation form** that reflects the assessor's evidence of what was seen within the team meeting for this task).

Candidate evidence

4.1 Team Meeting Agenda

Team Meeting – 20 June

AGENDA

1. Welcome	Store Manager/Team Leader Trainee
2. Purpose of the meeting – the need for change	Team Leader Trainee
3. Project Plan	Team Leader Trainee
4. Discussion – Roles and responsibilities in the change	All staff
5. Any questions, concerns or issues	All staff
6. Next steps	Team Leader Trainee
7. Date and time of next meeting	Team Leader Trainee

4.2 Email to the Team

Email Attachments: Meeting Agenda

I would like to invite you to the first staff meeting on 20 June, to update you on the new online project we are introducing. I know you will have heard about this and now is your opportunity to learn more and ask any questions you might have, as well as raise your concerns and issues.

It is an exciting development for BestShoes and one we all need to understand and be part of in order to make it a success.

I look forward to seeing you all and answering your questions.

Many thanks,

Magdalena Enrico

Team Leader Trainee

BestShoes

Family-run shoe specialist

Visit us at our website [here!](#)

4.3.1 Practical Observation Record

Task

Chair the team meeting to discuss the move online with the team, ensuring that concise meeting minutes with clear actions are captured. The meeting minutes will be shared with the Store Manager and Store Owner for monitoring progress of the project and team morale.

The following notes were made through observation of the coaching session.

Magdalena demonstrated that she was able to present the information regarding the move of the business online clearly following the order of the agenda.

Throughout the team meeting, Magdalena demonstrated that she was able to speak clearly to the team as the audience in order to deliver key messages on the need to move the business online. There was some attempt made to consider adapting her communication to provide slightly different messages at different points during the meeting. Magdalena was able to provide a reasonable response to questions posed by the team, demonstrating some use of listening skills in order to confirm that she had understood what had been asked.

Overall, the team meeting was chaired by Magdalena in an acceptable manner than meant the overall intent and purpose of the meeting was met. Magdalena demonstrated some effectiveness at adapting communication and style in order to deliver key messages.

4.3.2 Meeting Minutes

Meeting Title: BestShoes Team Meeting

Meeting Date and Time: 20 June, 2pm

Venue: Online

Present: Magdalena Enrico (Team Leader Trainee), Greta Melo (Store Manager), Rosheen Dalton (Shift Team Leader), Eduardo Aue (Sales Assistant), Sara Jeames (Sales Assistant)

Apologies: Alexia Easton (Saturday Sales Assistant)

Minute	ACTION	WHO	BY WHEN	SIGNED OFF
A participant asked about timelines for the project of moving the business online.	Share the project plan with the team.	Magdalena Enrico	25 June	<i>Date when actions signed off at next meeting or could be carried forward</i>
A participant asked about risks with moving the project online.	Develop a risk register or risk log to identify risks. Share risk log with the team.	Magdalena Enrico	27 June	
A participant asked about how we will move the business online successfully.	Share details of the steps in the project plan.	Magdalena Enrico	1 July	
As this is the first project meeting, an action would be to keep all parties updated of the project.	Set-up future meetings with the team to discuss project progress.	Magdalena Enrico	25 June	
Date and time of next project meeting	Send out meeting invite	Magdalena Enrico	25 June	

4.4 Reflection

As a new member of staff with a big project to push through I was nervous, but I decided that I should just tell everyone what was happening. I know some of them don't like change, but it is coming and so they will have to accept it. I think you could define this as being autocratic in my leadership, as I was telling them what to do which will be an effective management approach at the start of the project to ensure the team is clear on what needs to happen.

I started with a brief explanation of why we needed the project and that it was the only way to save the business and their jobs in the long-term. In the future, I would use a more inclusive democratic style in my management of the team and ask people for their ideas and opinions to sell the benefits to the team a bit more at the start of the project. This is something I will practice doing as the project rolls out.

I have also done some research into Emotional Intelligence and how being more self-aware can make you a better leader. Emotional Intelligence recognises your own emotions, and those of others, so it can help when it comes to my leadership approach.

Considering my own approach, I am very task-oriented, and this can mean that I appear unsympathetic to staff as I just want to get the job done. I am new to the company and want to make my mark, but on reflection I need to look at how my behaviour can impact on the team. I need to consider the individual and the team, and this means to adapt my natural style to listen to them, slow down and give everyone the time they need to consider the ideas put forward. I also need to think about how my body language gives away feelings so I will need to work on this in my management of the team. It is not just about the words I use but how I say them and my non-verbal communication as well. I need to understand their feelings and see the changes from their point of view. Some staff have been here a long time and they feel nervous about learning new skills and ways of working e.g. online computer systems. By putting myself in their place and using my emotional intelligence, I can respond to them better and this will help me engage them with the project so it can be a success.

As I learn more about my team and the individuals in it, I can reflect more effectively on the impact of my management style. Because I need them to co-operate to get the job done on time, I need to be able to adapt my leadership style, consider their needs, and to get them on board working to achieve the changes that are essential for the business.

Commentary

The meeting materials developed provide an acceptable attempt at encouraging participation from the team in the new project.

During the chairing a meeting task, the candidate demonstrates an acceptable understanding of key considerations for moving the business online and shows an attempt to match communication to audience and purpose, with some success at supporting engagement with the team. The meeting minutes capture the key points discussed during the meeting and have attempted to provide appropriate actions assigned to each, as well as an appropriate timescale.

The candidate demonstrates an attempt to reflect on own abilities when supporting the management of the team through change during the team meeting. Some consideration is provided for how own performance and the successful management of others is linked, with an acceptable attempt made to link an understanding of emotional intelligence with the ability to manage others. The reflection focuses mostly on current ability, with some consideration for how abilities will need to be developed to support ongoing leadership of the team.

Task 5

Coaching and developing a team member

For Task 5 candidates need to produce the following pieces of evidence:

5.1 Coaching plan

5.2 Recording of coaching session*

5.3 SMART objectives and Personal Development plan for Eduardo

(* this evidence is presented here in the form of a **Practical Observation form** that reflects the assessor's evidence of what was seen within the coaching session for this task).

Candidate evidence

5.1 Coaching Plan

Coach Name -		
Coachee Name - Eduardo Aue		
Date, time, location coaching session		
Aim of the session - For example: <i>Understand what areas and goals Eduardo wants to work on</i> <i>Support Eduardo to understand how he can achieve his goals</i> <i>Discuss ways forward and plan next steps</i>		
Models and techniques for session - For example: <i>GROW model, questions, reflection</i>		
GROW Model	Questions	Responses
Goals	What would you like to achieve?	
	What challenges will you face?	
	How will you know you have achieved your goal?	
Reality	How close are you to achieving your goal?	
	What have you done so far?	
Options	What options do you have for achieving your goal?	
	What could you learn that will help you with this?	
Way Forward	What are you going to do first and by when?	
	What will you do next and by when?	
	How will you move forward?	

5.2 Practical Observation Record

Task

Run an initial coaching session with Eduardo, using the coaching model and technique detailed in the coaching plan.

During the coaching session candidates are required to:

Agree SMART objectives with Eduardo in order for him to feel confident in his job role after the change moving the business online.

Develop a personal development plan with Eduardo, including the SMART objectives agreed in the coaching session and timescales.

The following notes were made through observation of the coaching session.

Magdalena was able to demonstrate an acceptable understanding of the GROW coaching model, running the coaching session addressing me as Eduardo.

Magdalena's questions were open, relevant, and well structured around the GROW model and she demonstrated some active listening skills. Questions asked were not always strongly utilised to support Eduardo in feeling more confident in his job role after the business moves online.

Magdalena spoke clearly and was able to adapt her communication in the role as coach. Throughout, some attempt was made to check for understanding or clarification of Eduardo and when SMART objectives were developed from the discussion. She demonstrated she was able to assign each objective an appropriate timescale.

Overall, this was an acceptable coaching session with the coaching model used well to agree SMART objectives for Eduardo in a personal development plan.

5.3 SMART Objectives and Personal Development Plan

EDUARDO AUE – PERSONAL DEVELOPMENT PLAN

SMART Objective – By December 2021 I will have improved my confidence in dealing with customers about BestShoes products				
Development Need Identified	How?	Resources required (including support)	Target date for completion	Outcomes
Improve knowledge of product offerings including details on materials, price, offerings in similar styles	In-house training/coaching from managers Gather own knowledge on products by reviewing product databases and supplier catalogue	Management support Time away from shop floor.	Dec 2021	To be able to deal with customers more successfully
SMART Objective – By September 2021, I will understand how the new stockroom works for online orders				
Understanding of how online orders will work and the layout and organisation of the new stockroom	In-house training from managers	Management and colleague's support Information in staff meetings on the plan for online orders and the new stockroom	September 2021	To be able to successfully fulfil online orders correctly and within schedule

Commentary

The candidate has produced an acceptable coaching plan, within a logical sequence, that is aligned with the project brief and organisational context of supporting Eduardo feel more confident in the change in his job role. There is an attempt to demonstrate use of the GROW model and includes some details on overall aims of the coaching session and acceptable questions to be asked during the session. The response could be strengthened by providing some justification for why the GROW model is the most appropriate coaching model to be used with further links to the project brief.

The candidate demonstrates that they are able to run an acceptable coaching session, using the coaching plan to support the individual feel more confident in their job role. The outcome appears to show some effectiveness at meeting objectives, with some SMART objectives identified that have appropriate timescales.

The personal development plan is of an acceptable standard, which highlights an attempt to support Eduardo with some consideration for the most appropriate SMART objectives and detailing how these will be measured for success and used to support Eduardo. The response could be strengthened by further developing how the SMART objectives can support Eduardo to succeed.

Task 6

Managing a challenging conversation

For Task 6 candidates need to produce the following pieces of evidence:

6.1 Written summary of response to negative behaviour

6.2 Action Plan that includes the leadership style to be used, how anti-discriminatory practice and equal opportunities will be demonstrated and the SMART objectives that will be used to support Sara

Candidate evidence

6.1 Written Summary

In my role as Team Leader Trainee, I need to address Sara's recent negative behaviour during the team meeting as it is not what is expected during the workplace. This is because her behaviour was negative as well as becoming aggressive, and she began to try and influence her negative feelings onto other members of the team which may impact them in a negative way. Her behaviour showed that she has an issue with the move of the business online which needs to be addressed. It was also not appropriate for her to begin blaming management for the poor sales in the store.

There are a number of areas to consider:

- I may need to talk to the team about the options and process of how we will move the business online. The staff need a chance to raise concerns to me or the store manager in an appropriate way.
- I will need to carry out a fair investigation of Sara's behaviour during the team meeting.
- We have legal obligations to take practical measures to offer support for staff.
- We have a policy that covers discrimination, bullying and harassment so will need to check this as she attempted to influence other team members in an aggressive manner.
- Speak to Sara about why she behaved like this and set an action plan for what needs to happen to ensure the incident is dealt with properly.

Team Leader Trainee Response to Sara Jeames

"I need to discuss this with you Sara:

- You were not very happy and quite negative towards the plan to move the business online and you came across as being very angry towards everyone.
- You blamed the managers for poor footfall and when we tried to explain you would not listen. This sets a bad example to others. We could not talk about the reasons for the changes or the new objectives to the team.
- Eduardo and Alexia wanted to ask questions about their new work, but could not get a word in, this was unfair behaviour.

It is important that everyone understands the reasons why the business is making this choice to move online, we won't have a job for long if we don't.

I would now like you to come to a one-to-one meeting on Friday 30th July. I want to hear why you feel angry so make a list of all the reasons (good and bad) and we can chat about it and look at the new tasks in the role. To monitor things an action plan will be used to support you in hitting the new business objectives."

6.2 Action Plan

Leadership style needed to manage performance

A leader needs to be able to adapt their leadership style depending on the individual, task, or team situation. In this situation an autocratic leadership approach will be used to deal with behaviours that Sara Jeames needs to change.

Using this leadership style and approach will help to direct Sara on what she needs to improve and by when. It will be telling rather than negotiation as it is important, she listens and changes her ways.

It is important to give feedback, or she will not know what she has done wrong. Training will be set by the shift Team Leader and monitored. The below Action Plan with resources will help with this as it includes SMART objectives to support Sara in staying on track. These are helpful because they are more achievable than writing goals that she may not be able to meet.

ACTION PLAN

Name: Sara Jeames Position: Sale Assistant

Date: 30th July 2021

Team Leader Trainee: Magdalena Enrico

Store Manager: Greta Melo

BEHAVIOURS TO IMPROVE <i>List the skills, behaviours, duties, or actions that need to be improved. Be specific.</i>	SMART OBJECTIVE <i>What steps or actions need to be taken to ensure improvement?</i>	DEVELOPMENT OPPORTUNITIES/RESOURCES <i>What training, resources or support are needed to improve?</i>	DATE TO BE COMPLETED	LEADERSHIP STYLE ADAPTED & IMPACTED	SUCCESS MEASURES <i>What does improvement look like?</i>
Listening/ feedback skills	Do a check list on how to behave in team members	Training. On- line module - Effective Communication.	25 th August 2021	Autocratic/ telling	More listening, will allow others to speak their views.
Working with others	Agree a plan with team leader on how to work well with team members	Coaching from Team Leader. Time with team	30 th July 2021	Coaching - Supporting and listening	Meets action plan with Team Leader.
Equality & Diversity	Training on Bullying in the workplace	Training – Online	30 th Oct 2021	Autocratic/ telling	Respect shown to others in the team.

Next Review Date: 25th August 2021

Employee Signature: Sara Jeames

Team Leader Trainee Signature: Magdalena Enrico

Should there be no change to your behaviour within agreed timescale then further disciplinary action may be taken.

Commentary

The written summary produced is an acceptable standard and provides some consideration as to why Sara's behaviour is not conducive to a work environment with some linkage to the project brief. For example, that Sara's behaviour may impact negatively on other members of the team. The response focuses primarily on the impact of Sara's behaviour on the organisation, rather than trying to understand her perspective and considering what may be causing her to respond in this way.

The action plan produced is an acceptable standard which details appropriate actions that are linked to workplace behaviours with some effectiveness. Each action in the plan is SMART, and an attempt is made to detail success measures for each. There is an attempt to consider how equal opportunities and anti-discriminatory practice should be used in dealing with Sara's behaviour as a team leader. The candidate demonstrates they are able to provide some consideration of how the autocratic leadership style is the most effective leadership style to handle the situation with some justification that is not fully developed or expanded. The candidate provides some consideration as to the how the information is cascaded to Sara in terms of providing important feedback to support her improve her behaviour, but this is not fully expanded.

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