



# Pearson BTEC Nationals in Enterprise and Entrepreneurship

## Delivery Guide

Pearson BTEC Level 3 National Certificate in Enterprise and Entrepreneurship

Pearson BTEC Level 3 National Extended Certificate in Enterprise and Entrepreneurship

Pearson BTEC Level 3 National Diploma in Enterprise and Entrepreneurship

**First teaching September 2016**

Pearson BTEC Level 3 National Foundation Diploma in Enterprise and Entrepreneurship

Pearson BTEC Level 3 National Extended Diploma in Enterprise and Entrepreneurship

**First teaching September 2017**

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# Welcome to your BTEC National delivery guide

This delivery guide is a companion to your BTEC Level 3 National specifications, Authorised Assignment Briefs (AABs) and Sample Assessment Materials (SAMs). It contains ideas for teaching and learning, including practical activities, realistic scenarios, ways of involving employers in delivery, ways of managing independent learning and how to approach assessments. The aim of this guide is to show how the specification content might work in practice and to inspire you to start thinking about different ways to deliver your course.

The guidance has been put together by tutors who have been close to the development of the qualifications and so understand the challenges of finding new and engaging ways to deliver a BTEC programme in the context of the new qualifications from 2016 and 2017.

Guidance around what you will need to consider as you plan the delivery of the qualification(s) has been provided. You will find information around the structure of your course, how you may wish to build the course for your learners, suggestions for how you could make contact with employers and information around the other support and resources available to you.

Unit-by-unit guidance has been provided and includes suggestions on how to approach the learning aims and unit content, as well as ideas for interesting and varied activities. You will also find coverage of assessments, including useful advice about external assessment, as well as tips and ideas around how to plan for and deliver your assignments.

You will also find a list of carefully selected resources for each unit. The lists include suggestions for books, websites and videos that you can either direct your learners to use or that you can use as a way to complement your delivery.

We hope you will find this guidance relevant and useful.

Enjoy your course!

## **What's new**

The BTEC Level 3 Nationals 2016 and 2017 are the result of more than three years' consultation with employers, higher education institutions (HEIs), and many thousands of tutors and managers in colleges and schools. Our aim has been to ensure that BTEC Level 3 Nationals continue to allow a recognised and well-respected route into employment or higher education by meeting the needs of these key stakeholders, and that learners continue to enjoy a stimulating course of study and develop the skills and attributes that will enable them to progress.

As a result of this consultation, and on the advice of employers, HEIs and, most importantly, of those of you who teach BTEC, some key changes have been made to the BTEC Level 3 Nationals. These are described throughout this delivery guide and include the following.

- **Updated content and a larger proportion of mandatory content** – both employers and universities said they wanted a greater consistency in coverage of the subject for BTEC learners. Employers wanted to see systematic coverage of core knowledge and skills for their sector, and for the Nationals to reflect up-to-date industry practice.
- **The reintroduction of external assessment** – employers were keen to see an element of rigour and consistency across the country in terms of assessment, while HEIs wanted learners to be better prepared for meeting deadlines and preparing for formal exams, where appropriate. Both were keen to see learners applying their knowledge and skills to new contexts through synoptic projects and assessments.
- **A focus on employability skills** – the BTEC approach to learning, through projects, self-directed assignments, group work and work placements has always supported the development of employability skills, e.g. self-management. In the new Nationals, the balance of cognitive and skills work has been carefully calibrated to ensure learners get a range of different opportunities across their course.
- **Broader assessment in internal units** – the assessment criteria for each unit are carefully structured to set a clear level of demand. Distinction criteria encourage and require depth of study, including demonstration of the application of knowledge and understanding as well as a synoptic element for the learning aim or unit.
- **Alignment with DfE criteria for performance measures for 16–19 year olds in England** – all new BTECs are designed as either Applied General qualifications or Tech Levels to fulfil criteria for inclusion in 2018 performance tables and funding for 16–19 year olds and 19+ learners.

**Please visit the qualifications website to check the status of funding and performance measure recognition for each year.**

To support transition to the BTEC Level 3 Nationals 2017, we are providing an enhanced support programme with exemplar and practice materials and training. Please see the *Support and resources* section for details of this support, and the link to sign up for tutor training, which continues throughout the lifetime of the qualification.

#### **Notes:**

The specification tells you what **must** be taught and what **must** be assessed. This delivery guide gives suggestions about how the content could be delivered.

The suggestions given in this delivery guide link with the Authorised Assignment Briefs provided by Pearson, but they are not compulsory. They are designed to get you started and to spark your imagination.

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# OVERVIEW

## Delivery Guides as support

In the specification, the 'Unit content' tells you what must be taught and the 'Assessment criteria' what must be assessed. The 'Essential information for assessment decisions' explains what the assessment criteria mean.

This delivery guide provides suggestions and ideas on how to plan and deliver the qualification, and includes a summary of recent changes.

Unit-by-unit guidance has been provided, which includes suggestions on how to approach the learning aims and unit content. Teaching, learning and formative assessment activities are also suggested. You will also find delivery plans to help you timetable your course and ensure your learners are well prepared for internal and external assessments.

Links to carefully selected resources are provided for each unit. The lists include suggestions for books, websites and videos, which will help you plan and deliver your course. Alternatively, you may wish to direct your learners to these resources.

Use the delivery guides as model templates or an interpretation on which you can base your own plan. Every delivery guide presents each unit as an exemplar, highlighting Enterprise and Entrepreneurship links to motivate tutors and learners.

## Significant changes for those teaching to the new 2017 specification

The BTEC Level 3 Nationals 2017 contain significant changes to the previous 2010 version. These changes reflect the views and demands of enterprise and entrepreneurship teaching practitioners, those working in this sector and government bodies with oversight of the qualifications.

For those familiar with the older 2010 specification, these changes are summarised in the table below:

<b>Change</b>	<b>New 2017</b>		<b>Old 2010</b>	
Programme Name	Enterprise and Entrepreneurship		Enterprise and Entrepreneurship	
Qualification Names/GLH	Certificate 180 GLH			
	Extended Certificate	360 GLH	Subsidiary Diploma	360 GLH
	Foundation Diploma	510 GLH	90 – credit Diploma	540 GLH
	Diploma	720 GLH	Diploma	720 GLH
	Extended Diploma	1080 GLH	Extended Diploma	1080 GLH
Mandatory Units	Between 2 and 8 dependent on qualification		Between 3 and 10 dependent on qualification	
Optional Units	Choose from up to 5 dependent on qualification		Choose from up to 13 dependent on qualification	
Assessment	Internal through assignment and up to 4 External depending on qualification		Internal only through assignments	

## Structure

The table below shows a summary of the structure of the Enterprise and Entrepreneurship suite of qualifications. Ensure that you use the full structure found in *Section 2* of the specification when planning your course.

Unit (number and title)	Unit size (GLH)	Certificate (180 GLH)	Extended Certificate (360 GLH)	Foundation Diploma (510 GLH)	Diploma (720 GLH)	Extended Diploma (1080 GLH)
1 Enterprise and Entrepreneurs	90	M	M	M	M	M
2 Developing a Marketing Campaign	90	M	M	M	M	M
3 Personal and Business Finance	120		M	M	M	M
4 Launch and Run an Enterprise	90			M	M	M
5 Survival and Growth	90				M	M
6 Business Decision Making	120				M	M
7 Social Enterprise	60		O	O	O	O
8 Enterprise and Intrapreneurship in Practice	60		O	O	O	O
9 Innovation and Enterprises	60			O	O	O
10 Recruitment and Selection Process	60					O
11 Marketing Communications	60					O
12 Principles of Management	120					M
13 Developing an Enterprise Strategy	120					M

### Mandatory units

Each qualification has a number of mandatory units that have been designed to ensure that all learners completing the qualification have the same knowledge and skills that employers and higher education institutes require. Learners must complete and achieve at Pass grade or above for Units 2, 3, 6, 12 and 13 (Group A) and at least two of Units 1, 4 and 5 (Group B).

### Optional units

The optional units have been chosen to complement the mandatory units. All optional units are internally assessed, and learners must complete at least four optional units. Learners can choose between Unit 7, 8, 9, 10 or 11.

### External units

There are four externally assessed units within this suite of qualifications, with the size of qualification dictating the number of EA to complete.

Learners must pass all of these units. You should consider this in your delivery plan when entering them for the assessment. Also think about how you may deliver them, which could differ from unit to unit depending on their method of assessment.

For all EA units, the delivery of the content should be approached in a similar way to the IA units, so that where employer involvement is suitable, or practical activity to support learning, this should be continued.



## Unit 2: Developing a Marketing Campaign

### Timing within Diploma

The assessment availability is twice a year in January and May/June. It would be more relevant to deliver this within the first year; the first assessment is not available until May/June 2017; this allows time to develop and practise the skills through other units.

### Combination and delivery

- Before taking the external assessment, it would be better for learners to learn the skills and develop practice of delivering a marketing campaign. Units 1, 4 and 7 support this.

## Unit 3: Personal and Business Finance

### Timing within Diploma

As a unit that has skills that underpin finance application and practice, it would be useful for this to be delivered throughout the course, potentially benefitting from being over the full two years where this is an option

### Combination and delivery

- Easily combined with optional units that require financial awareness and application.
- This unit underpins the financial aspects of running a business, and it would be useful for monitoring progress in all other units. It would therefore be better if ran throughout the first year of the course. The first examination is available in May/June 2017.
- This unit is necessary for completion of the National Certificate and Extended Certificate and would therefore be necessary to complete within the first year, if the centre wishes to claim results.

## Unit 6: Business Decision Making

### Timing within Diploma

The assessment availability is twice a year in December/January and May/June. The first assessment is available in May/June 2018. This would need to be a second year option, or split over two years.

### Combination and delivery

- This unit builds upon knowledge developed throughout the course, and so knowledge gained in the units studied in year 1 will be developed here.
- If this unit is split over two years, it will support all other units during the course.
- Knowledge gained from all units undertaken in year 1 will be built upon with this unit in year 2.
- This unit links all units to give a holistic approach to Enterprise.

## Unit 12: Principles of Management

### Timing within Extended Diploma

The assessment availability is twice a year in December/January and May/June. The first assessment is available in May/June 2018. This would need to be a second year option, or split over two years.

### Combination and delivery

- This unit enables learners to understand how the role of management and leadership in the workplace contributes towards business success.
- Knowledge gained from optional Unit 10 will relate to this unit and mandatory Unit 13 will then build upon what this unit covers. These units can be combined.

### Synoptic assessment

For *Unit 13: Developing an Enterprise Strategy* (Extended Diploma), learners must complete this 120 GLH internally assessed synoptic unit. Learners will need to complete activities that consolidate knowledge, understanding and skills from all of the units studied across the qualification. It is designed to draw all the learning together in a strategic plan.

The qualification can and should be delivered in a holistic way, looking at a potential assessment that can meet a range of unit criteria. It should be assessed towards the end of the course.

## **Overview of the Enterprise and Entrepreneurship qualification suite**

The BTEC Level 3 National in Enterprise and Entrepreneurship suite has been developed with significant input from all sectors. It is aimed at learners who want to progress to higher education, an apprenticeship, employment or into a business start-up. There are five qualifications in the suite that are equivalent in size to a specific number of A levels.

### **National Certificate**

The Certificate offers an introduction to enterprise and entrepreneurship through applied learning. It supports progression to higher education as part of a programme of study that includes other vocational or general qualifications. It is designed for learners who want to complement their study with an element of enterprise and entrepreneurship.

### **Extended Certificate**

The Extended Certificate is for learners who are interested in learning about enterprise and entrepreneurship alongside other fields of study, with a view to progressing to a wide range of higher education courses, not necessarily in enterprise-related subjects. It is designed to be taken as part of a programme of study that includes other appropriate BTEC Nationals or A levels.

### **National Foundation Diploma**

The Foundation Diploma is designed as a one-year, full-time course covering the fundamentals of enterprise and entrepreneurship. It supports progression either to an apprenticeship in the enterprise and entrepreneurship sector or to a further year of study at level 3. It supports progression to higher education if taken as part of a programme of study that includes other BTEC Nationals or A levels.

### **National Diploma**

The Diploma is designed to be the substantive part of a 16–19 study programme for learners who want a strong core of sector study. This programme may include other BTEC Nationals or A levels to support progression to higher education courses in enterprise and entrepreneurship areas before entering employment. The additional qualification(s) studied allow learners either to give breadth to their study programme by choosing a contrasting subject, or to give it more focus by choosing a complementary subject. This qualification can also be used to progress to Higher Apprenticeships.

### **Extended Diploma**

The Extended Diploma is designed as a two-year, full-time course that meets entry requirements in its own right for learners who want to progress directly to higher education at degree level, or to employment in enterprise and entrepreneurship. Progress could be either directly to employment in level 3 job roles or via higher education courses.

## Making the right choice for your learners

The suite of qualifications is meant to be inclusive and support individuals in their progression. The prior achievement and aspirations of learners is key to advising the most appropriate study programme. This would ideally combine in-depth discussion with a qualification review.

For learners who wish to progress directly to higher education, there are a range of qualifications in the suite that ensure they will have the skills to cope with the academic and independent learning. In recognition of some of the highly specialised areas within the business industry, the smaller qualifications provide opportunities for learners to have the vocational experience in parallel with other specialist qualifications.

Below are some examples of learners' potential progression routes:

<b>16-year-old learner choice</b>		
<b>Progression intention</b>	<b>Prior achievement</b>	<b>Potential BTEC National route</b>
Enterprise in HE	5 GCSEs C or above with Maths and English	<b>BTEC National Extended Diploma</b>
Business, Business-related subject, or Enterprise in HE, but uncertain of course	5 GCSEs C or above with Maths and English	<b>BTEC Extended Certificate</b> (with any blend of A levels) or other BTECs
Entry level employment/ apprenticeship, or Business start-up	5 GCSEs C or above with Maths and English	<b>BTEC National Diploma</b>

<b>19+ learner choice</b>		
<b>Progression</b>	<b>Prior achievement</b>	<b>Potential BTEC National route</b>
Business, Enterprise or Business-related subject in HE	No experience in business, but has 5 GCSEs B or above including Maths and English	<b>BTEC National Diploma</b>
Business start-up or direct entry into employment	Some experience in Business with 5 GCSEs B or above including Maths and English	<b>BTEC Foundation Diploma</b>

## Making contact with employers

Employer contact is one of the most cherished experiences BTEC National learners can have, by ensuring realistic and valuable learning. The commitment of teaching teams and time costs can be offset by the increase in responsibility taken by learners due to employer engagement.

Partnerships between companies, local entrepreneurs and centres can often build an annual collaboration that is beneficial to all. Some ideas that may support centres expanding their employer engagement include:

- For live briefs, guest speakers and employer critiques, contact a local freelance or sole trader business network.
- For ensuring projects are realistic, submit them to a local network meeting for discussion and revision.
- Small companies can often spare short amounts of time to provide business advice or feedback on projects.
- Contact small local companies directly and suggest how they may be able to support your learners through experiences including mock interviews, pitches, case studies and product critiques.
- Encourage learners to run enterprise activities within the centre.
- Learners support internal events or work alongside staff to provide 'real' internal solutions.
- For work experience and placements, contact the local education business partnership.
- For support or advice with enterprise activities or business pitches and competitions, approach a large local employer through their human resource department.
- For sponsorship of facilities and equipment along with collaboration, approach medium-size companies.
- Contact local charities who are often keen for the publicity learners can generate about their cause.
- Connect with local pop-up shops who often have short spells where they may be empty and can be filled by your learners.
- For support in teaching and workshops or case study seminars and question and answer sessions, contact previous learners who have moved into industry and started their careers/business start-ups.

## Employability skills

Learners should develop employability skills alongside their technical skills. These include:

- **Self-management:** readiness to accept responsibility, flexibility, time management, readiness to improve own performance
- **Teamworking:** respecting others, co-operating, negotiating/persuading, contributing to discussions
- **Business and customer awareness:** basic understanding of the key drivers for business success and the need to provide customer satisfaction
- **Problem-solving:** analysing facts and circumstances and applying creative thinking to develop appropriate solutions
- **Communication and literacy:** application of literacy, ability to produce clear, structured written work, and oral literacy (including listening and questioning)
- **Application of numeracy:** manipulation of numbers, general mathematical awareness and its application in practical contexts
- **Application of information technology:** basic IT skills including familiarity with word-processing, spreadsheets, file management and use of internet search engines.

Further detail around these can be found in the qualification specifications.

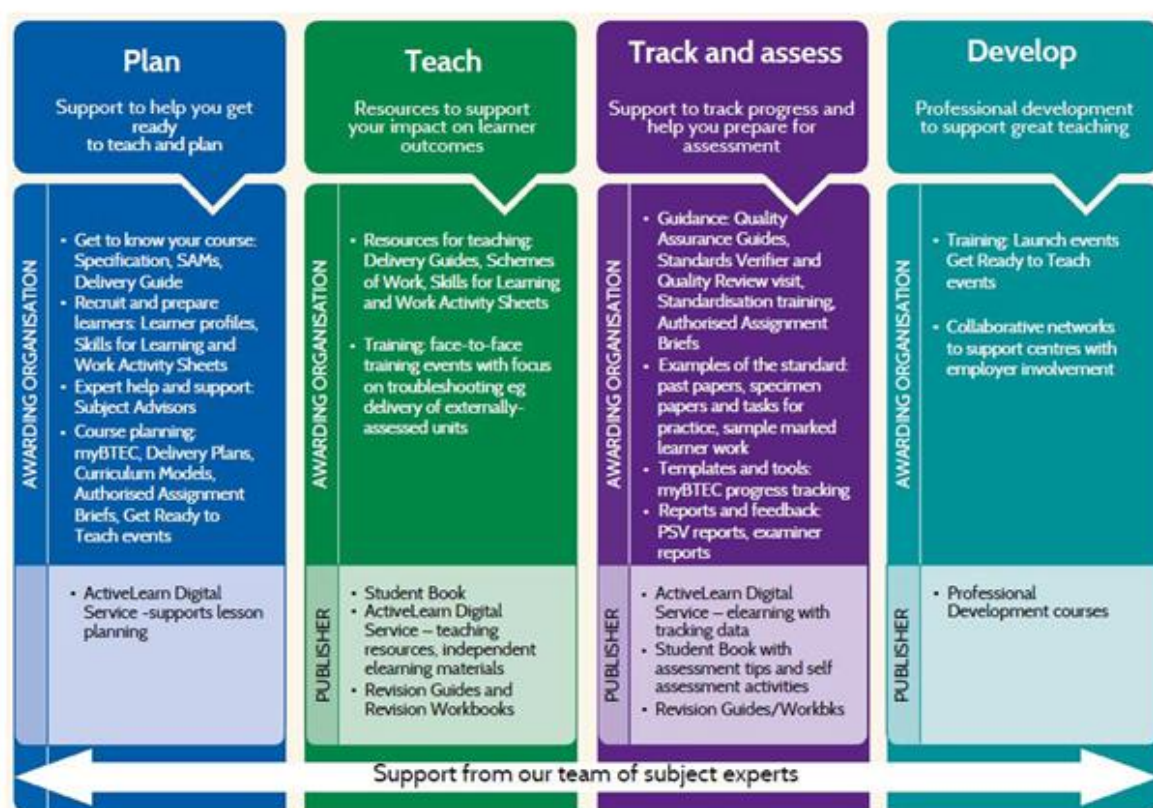
## SUPPORT AND RESOURCES

There is a wealth of resources available to ensure you feel confident delivering your BTEC National qualification throughout your entire course.

All the 'Awarding Organisation' resources can be found on the Pearson Qualifications website here: <http://qualifications.pearson.com/en/qualifications/btec-nationals/enterprise-2016.html>

As well as the free resources supporting the qualification, provided by Pearson as an Awarding Organisation, Pearson Learning Services ('Publisher' in the tables below) provides a range of engaging resources to support BTEC Level 3 Nationals, including:

- Student books in e-book and print formats
- Revision guides and revision workbooks in e-book and print formats
- Teaching and assessment packs, including e-learning materials via the ActiveLearn Digital Service



In addition to the 'publisher' resources listed above, other publishers in addition to Pearson may produce textbooks that are endorsed for BTEC. Check the Pearson website (<http://qualifications.pearson.com/en/support/published-resources.html>) for more information as titles achieve endorsement.

There are also a number of people who are available for you to speak to:

- **Standards Verifiers** – they are subject specialists who can support you with ensuring that your assessment plan is fit for purpose and whose role is to confirm that you are assessing your learners to national standards as outlined in the specification by providing quality assurance through sampling.
- **Curriculum Development Managers (CDMs)** – they are regionally based and have a full overview of the BTEC qualifications and of the support and resources that Pearson provides. CDMs often run network events.
- **Customer Services** – the 'Support for You' section of our website gives the different ways in which you can contact us for general queries. For specific queries, our service operators can direct you to the relevant person or department.

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Training for the new BTEC Level 3 Nationals can be found on the Pearson website here: <http://qualifications.pearson.com/en/support/training-from-pearson-uk.html>

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## Unit 1: Enterprise and Entrepreneurs

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### **Delivery guidance**

#### **Approaching the unit**

This unit introduces learners to the concept of enterprise and entrepreneurs and underpins the knowledge needed to understand how and why entrepreneurs become successful, or indeed not.

Enterprise and entrepreneurs are the driving force of our economy and this unit will encourage learners to research and investigate the motivations as to why people are enterprising and risk-taking. You should deliver this unit in a practical manner, allowing your learners to be inspired by the many local and national entrepreneurs thereby examining learners' own potential entrepreneurial skills that could one day make them budding entrepreneurs.

The focus of this unit is on learners researching enterprise and entrepreneurs, drawing out what makes them creative and innovative, risk-taking and risk driven. It is important that you ensure that learners do not look at entrepreneurs with the proverbial 'rose-tinted glasses' and therefore also explore the issues and constraints that entrepreneurs face when setting up their enterprises.

You should aim to deliver this unit by introducing learners to local entrepreneurs, where possible. They will provide learners with the rich experiences of someone who has been through the process of setting up their own enterprise, the constraints, the issues and the desires. Often, the most inspiring of entrepreneurs can be found on your local high street – the barber, the florist or local jewellery maker. Also, getting in touch with your local Chamber of Commerce may help build local networks with small businesses in your local area. If this is not possible, use suitable videos from TED or clips from Dragons' Den. Interviews, discussions, focused research activities and case studies will enhance delivery.



## **Delivering the learning aims**

### **Learning aim A**

Learning aim A is best introduced through using real examples of UK enterprise and entrepreneurs. In order to deliver this unit as effectively as possible, the use of business people is crucial. Local business networking events/hubs, often run by your local Chamber of Commerce and Speakers for Schools, will help you make links with local businesses and organise talks from professionals, but also local shop owners on your high street are often excellent examples of local enterprise and entrepreneurs. Set up an opportunity for learners to host a local business breakfast where they can invite local business owners to share their experiences in informal situations. Learners could ask questions to these entrepreneurs about what the benefits and risks are of their own enterprises. After the session, ask learners to try to identify what was innovative about a specific enterprise and what a business person's mindset is like when running their enterprise. Emphasise to learners that one of the key assets of all entrepreneurs is the ability to network (both in person and online (e.g., via LinkedIn)). Therefore, giving them the opportunity to do this in this unit will be invaluable.

Learners could then prepare factsheets or podcasts based on the entrepreneurs who they talked to/interacted with and therefore what they believe makes an entrepreneur successful. If meeting with entrepreneurs is not possible in your local area, you could write mini case studies based on your own experiences of entrepreneurs and businesses in your local area. Learners could then research these local entrepreneurs. Often, if local entrepreneurs are not willing to visit your centre, asking if you can bring a couple of learners to their shop or premises for an informal chat may work. All of the above will help learners to create a report on a successful enterprise and its entrepreneur and consider their mindset.

### **Learning aim B**

Similarly, for learning aim B, using local entrepreneurs as examples will serve as an interactive way for learners to investigate the role of motivation when starting a new venture. Getting in touch with The Peter Jones Foundation, The Prince's Trust or Young Enterprise charities may provide you with business mentors who are willing to speak to learners about the motivations of an entrepreneur and indeed the barriers to setting up a new venture.

Learners can then do some primary and secondary research of the impact that some entrepreneurs have made in their local economy, using local statistics, employment rates, standards of living etc.

The above context is very focused on the use of local entrepreneurs, however, if this is not possible, the use of famous entrepreneurs is also acceptable. The learners may not be able to interact with the entrepreneur, however, the use of TED talks and case studies from large enterprises may prove useful. Similarly, the impact of larger enterprises on the economy can be researched by learners. They could look at the impacts that they may have had on social change, by bringing about solutions that improve the standards of living. For example, Mark Zuckerberg can be used as an example of an entrepreneur using their influence to bring about social improvement to the worldwide economy. Learners could then add to their report from learning aim A to consider the opportunities and risks taken, the motivation for the venture and its importance to the economy.



Research your local 'enterprising libraries' (there are 17 library authorities around the UK in large cities) as these were set up to help new businesses start up and grow networking and economic growth. Further research about the results of local enterprises on economic growth can be found by internet research on 'Enterprise Zones' and 'Local Enterprise Partnerships'.

### **Learning aim C**

Following the research and networking learners will have done for learning aims A and B, learners can then become 'experts' on the opportunities and constraints for enterprise for learning aim C. In groups, learners could research the internal and external sources of finance and then report back to the class, who then use this information to create their own presentations. The UK Business Angels Association website has live pitch presentations that you can show to learners to show them what entrepreneurs potentially have to go through to receive external funding. Others can research crowdfunding, if you signpost them towards Indiegogo and Kickstarter and more recently YouTube. They could also interview bank customers such as their parents (and indeed each other) on why they have chosen the bank they use. Learners could then research the process for obtaining bank loans from their chosen banks. Others could research what grants and allowances (e.g., enterprise allowance) are available to start up enterprises, looking at The Prince's Trust, Community development financial institutions (CDFIs) and so on (see [startups.co.uk](http://startups.co.uk) for further information).

You could ask learners to find out realistically (and perhaps hypothetically!) how much money they could raise from their own funds and family and friends and then create a factsheet about themselves and whether they believe they could practically start a business with those amounts. This will ensure your learners have a genuine understanding of the finances necessary to start up a business.

It is also imperative that learners consider the competition that entrepreneurs and enterprises face and the development of their competitive advantage. Learners could consider a chosen enterprise/entrepreneur and conduct an investigation into their competitive advantage and competition. Current phenomena such as Pokémon Go case studies and articles can be used to introduce the concept of competitive advantage and external influences. Although Pokémon Go is free for users, its astonishing success has meant that many entrepreneurs have gained competitive advantage if there was a PokeStop near to their premises.

Set an exercise where pairs of learners research different businesses that have used Pokémon Go to their advantage and ask them to explain in short presentations to the class how these businesses have cashed in on this competitive advantage and the external influences that have played a pivotal role.

Individually, learners can then create a presentation based on a potential local enterprise opportunity and consider why it is viable, and the challenges it faces.



### **Learning aim D**

For learning aim D, learners could conduct an audit of their own entrepreneurial skills. They could create a poster of themselves with their picture in the middle and, using the unit content in D1, think of examples when they have displayed each skill. There will be gaps in these skills and you should ensure that this is emphasised to learners so that they can consider how to develop these skills. You could then create activities in the classroom to develop these skills further. For example, negotiation skills could be developed in a role play of a marketplace, with many competitors selling the same goods and only a few customers. Learners then have to barter for the best deal. Entering the Tycoon in Schools and Young Enterprise competitions can also further these entrepreneurial skills in practical situations for learners.

Encourage learners to think of their own entrepreneurial ideas for their local area, or indeed technological solutions (e.g., ideas for new apps), and their audience (other learners) should prepare questions to ask each other based on the idea. They could again be shown clips of Dragons' Den, The Apprentice or live pitches from the UK Business Angels Association to put into context the types of questions that would be asked. This will enable learners to identify the potential of their opportunity and they could then self-reflect on their ideas.



**Assessment model (in internally assessed units)**

Learning aim	Key content areas	Recommended assessment approach
<p><b>A</b> Explore the nature of enterprise</p>	<p><b>A1</b> Enterprise and entrepreneurship  <b>A2</b> Mindset of the entrepreneur</p>	<p>A written report on a successful enterprise and its entrepreneur, considering the mindset of the entrepreneur, the opportunities and risks taken, the motivation for the venture and its importance to the economy</p>
<p><b>B</b> Investigate the motivations for entrepreneurship</p>	<p><b>B1</b> The role of motivation when starting a new venture  <b>B2</b> Barriers to setting up a venture  <b>B3</b> Importance of entrepreneurs to the economy</p>	
<p><b>C</b> Examine the opportunities and constraints for enterprises and entrepreneurs</p>	<p><b>C1</b> Sources of internal and external finance  <b>C2</b> Government support and non-governmental  <b>C3</b> Competition and competitive advantage  <b>C4</b> External influences</p>	<p>A presentation for a potential local enterprise opportunity, considering why it is viable, the challenges that could affect that start-up together with a consideration of the entrepreneurial skills required for the start-up</p>
<p><b>D</b> Examine the entrepreneurial skills required to launch an enterprise</p>	<p><b>D1</b> Entrepreneurial skills  <b>D2</b> Assess potential enterprise opportunities  <b>D3</b> Develop the idea</p>	



## Assessment guidance

This unit is internally assessed through a number of tasks. Each task should cover at least one entire learning aim and it is essential that a learning aim is assessed as a whole, and not split into tasks or sub-tasks per criterion. There are a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aims: A and B (A.P1, A.P2, B.P3, B.P4, A.M1, B.M2, A.D1, B.D2)

Learning aims: C and D (C.P5, C.P6, D.P7, D.P8, C.M3, D.M4, C.D3, D.D4)

All learners must work independently and generate their own evidence towards the achievement of the learning aim(s) and this must be appropriately authenticated. The unit specification suggests a written report for learning aims A and B and a presentation for learning aims C and D. Learners should ensure that research is fully referenced with a bibliography.

However, you are not confined to these evidence types. Where more appropriate for learners, different evidence types could be used, for example, verbal reports, podcasts, video diaries etc.

For the assessment of learning aims A and B, it is recommended that learners produce a written report. They must select an appropriate successful enterprise and its entrepreneur. You will more than likely find that local entrepreneurs will give you far more insight into their mindset than if learners choose famous ones (however, there is no issue with selecting famous enterprises and entrepreneurs).

If learners choose a verbal report, or other suitable form of practical evidence, a record of practical activity will need to be completed by you as the assessor. However, as records of practical activity are not sufficient on their own as forms of evidence, the original learner-generated evidence must also support them. You should remember that you are assessing the content of the evidence against the assessment criteria and not the skill with which it is being delivered.

For the assessment of learning aims C and D, it is recommended that learners produce a presentation. For these learning aims, learners need to consider an enterprise that could be set up. You should check that these are viable in the local area prior to learners starting independent work on the achievement of the criteria.

Suitable forms of evidence for a presentation include slides, presentation notes, script, cue cards and a record of practical activity.



## Getting started

This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.

### Unit 1: Enterprise and Entrepreneurs

#### Introduction

Use real-life examples and case studies of local enterprise and entrepreneurs to introduce this unit. In order to deliver this unit as effectively as possible, the use of local business people is important. Local business networking events and hubs, often run by your local Chamber of Commerce, will help you make links with local businesses, but also local shop owners on your high street are often excellent examples of local enterprise and entrepreneurs.

There is a large focus on research, especially for learning aims A and B, which is then used throughout the unit.

#### Learning aim A – Explore the nature of enterprise

- You could introduce this learning aim by giving learners pictures and the names of some entrepreneurs and their enterprises, both local and national. You could ask learners to research who they are and discuss whether they believe they are entrepreneurs and if so, why? This could lead on to a discussion about what makes entrepreneurs successful.
- Ask learners to carry out further research and group presentations on local entrepreneurs and enterprises. You should ensure that you allow them to think 'outside the box' and consider why some small enterprises in their local area may be enterprising, while others not so much. This research could lead learners into inviting these entrepreneurs to a small business breakfast/coffee hosted at the centre (if possible) or other type of networking event. Do not forget that you will often have parents who are also entrepreneurs who would be willing to speak to learners! Local entrepreneurs should be encouraged to talk informally to learners about their experiences, their motivations, their mindset, the risks they have faced and the benefits of being an entrepreneur. Learners could then create a podcast or factsheets based on their talks with the entrepreneurs and from this try to identify what was innovative about the local people's enterprises and what therefore makes them successful. You could also tell the local paper and local Chamber of Commerce about the event. This could entice local entrepreneurs to be involved due to the potential resultant publicity!
- If this is not possible, the use of mini case studies based on local entrepreneurs who you know of will achieve the same outcome.
- Ensure that in these case studies and also in choosing your visiting entrepreneurs you cover the different types of enterprise – start-up, lifestyle, social enterprise, franchise and the legal formats for enterprise, e.g., sole trader, private limited company etc.
- In learners' reports, you should encourage more able learners to consider the mindset of the entrepreneurs. Ask learners which skills and attributes of the entrepreneurs they have met or studied have contributed most and least to their success and why, and which risks have contributed most or least to their success and why. In addition, they should consider the strengths and weaknesses of the skills and mindset of the entrepreneurs and how these have contributed to their success.

#### Learning aim B – Investigate the motivations for entrepreneurship

- Learners can use their experience of meeting entrepreneurs or case studies to



discuss what they believe motivates entrepreneurs. They could present their findings to the class. You should make sure that learners are aware that they may not be the same motivations for all entrepreneurs. You could also try to organise the possibility of small groups of learners visiting local enterprises (this may be your local barber, gift shop etc) and asking the owners informally what motivated them to start the business.

- Consider any social enterprises that may be in your local area too. You could show learners TED talks, such as Dean Kamen (bringing about social change through water purification systems).
- Ask learners to list what they think are the barriers to setting up a venture and share and discuss these as a group. Set an exercise for them to research the barriers to Simon Woodroffe of creating Yo! Sushi, Yotel and Yo! Home.
- You could then further develop this by asking learners to consider how entrepreneurs support the economy. Social change is also an important factor to consider. A good case study to use would be Toms Social Entrepreneurship Fund. Learners should research the initiative and consider how this supports the economies where they give.
- In a group discussion, ask learners to consider why the government has set up their local 'enterprising libraries' (there are 17 around the UK in large cities) as these were set up to help start new businesses and grow networking and economy.
- You could then focus on a further individual research task back to the local economy and learners could research the impact of local enterprises on economic growth as this information can be found by internet research on 'Enterprise Zones' and 'Local Enterprise Partnerships'.
- Learners can then add to their verbal/written report from learning aim A, selecting one specific entrepreneur and enterprise, explaining the motivation they had for setting their enterprise up and what barriers the entrepreneur had to overcome.
- You will need to ensure that more able learners consider the impact that their selected entrepreneur and enterprise has had on the local and national economy. They should consider the extent of the importance to the local and national economy. Learners should also consider the strengths and weaknesses of the motivations of the selected entrepreneur for setting up their enterprise and evaluate its impact on the local and national economy.

### **Learning aim C – Examine the opportunities and constraints for enterprises and entrepreneurs**

- For learning aims C and D, learners are considering an enterprise that could be potentially set up in their local area. Therefore, set up a group visit to their local high street to consider what may not be there, or organise a discussion of what apps, e.g., could be developed that would improve learners' day-to-day life.
- Alternatively, provide photos, or use Google Earth to study the local high street, and use this to start a discussion about the potential gaps in the market. This will help learners to put into context all the criteria in learning aims C and D.
- You can then introduce internal sources of finance by asking learners to realistically consider (and perhaps hypothetically!) how much money they could raise from their own resources and family/friends and then create a factsheet about themselves and whether they believe they could practically start a business with those amounts. This will help your learners build up a genuine understanding of the finances necessary to start up a business.
- By working through the above exercise, you should have been able to demonstrate a sense of the enormity of starting a new venture. Therefore, you can introduce external sources of finance as a way of getting additional funding for their ideas. You could show learners live pitch presentations from the UK Business Angels





Association website.

- You could then split the class into small groups and get each group to research a different external source of finance. For example, crowdfunding, signposting them towards Indiegogo and Kickstarter and more recently YouTube. Learners could also interview bank customers such as their parents (and indeed each other) on why they have chosen the bank they use. They could then research the process for obtaining bank loans from their chosen banks. Other groups could research what grants and allowances (e.g., enterprise allowance) are available to start up enterprises, looking at The Prince's Trust, CDFIs etc (see [www.startups.co.uk](http://www.startups.co.uk) for further information).
- Begin to introduce the idea of competition. Learners can create a monopoly type board game of their local high street (or indeed other competitors if they are producing a non-bricks-and-mortar business, such as apps) and give the higher value properties (e.g., Mayfair) to those competitors they feel are the biggest threats to their potential success, those that are medium threats and so on.
- You can then ask learners to produce a factsheet or a recording discussing their main competitors' competitive advantages and how they could overcome these.
- Ask learners to research their chosen industry and the competition they face within this industry and their own competitive advantage.
- Introduce current examples – one example could be Pokémon Go. Case studies and articles can be used to introduce the concept of competitive advantage and external influences. Although Pokémon Go is free for users, its astonishing success has meant that many entrepreneurs have gained competitive advantage if there was a PokeStop near to their premises. Ask learners to research a business that has used Pokémon Go to their advantage and explain in a presentation to the class how they have cashed in on this competitive advantage and the external influences that have played a pivotal role.
- Learners can then create a presentation based on a potential local enterprise opportunity and consider why it is viable, and the challenges it faces.

### **Learning aim D – Examine the entrepreneurial skills required to launch an enterprise**

- You could ask learners to create a poster of themselves (their picture in the middle) and, using the unit content from D1, think of examples when they have displayed each skill. There should be gaps in these skills and you should ensure that this is emphasised to learners so that they can consider how to develop them. Encourage learners to visit the Enterprise Catalyst website as they can do a free test there to check how enterprising they really are and see their results. You can then benchmark these as they progress through the qualification, understanding the impact of your enterprise initiatives and evidence Ofsted submissions.
- You could then create activities in the classroom to develop these skills in learners. Negotiation skills could be demonstrated and built on in a role play of a marketplace, with many competitors selling the same goods and only a few customers. Learners then have to barter for the best deal.
- Getting your learners involved in Tycoon in Schools and Young Enterprise can also help to develop these entrepreneurial skills in practical situations for learners.
- In addition, you could ask learners to complete an entrepreneurial skills audit. Some websites facilitate entrepreneur-specific audits that learners can complete online.
- Learners should then be encouraged to think of their own entrepreneurial ideas for their enterprise in their local area, or indeed technological solutions, (e.g., ideas for new apps). The learners could then present their ideas to the audience (the other learners). The audience need to be prepared to ask questions based on these ideas.



They could again be shown clips of Dragons' Den, The Apprentice or live pitches from the UK Business Angels Association to put into context the types of questions that would be asked.

- You should then ask learners to self-reflect on their enterprise ideas, considering the risks and the benefits and start to think about developing these ideas, with attention to branding and target market. This will enable learners to identify the potential of their ideas and they could then self-reflect on them.
- Ask learners to add to their presentation from learning aim C to include why it is important to consider the viability of their idea, the skills needed to run the enterprise, which opportunities and challenges are most important and which are least important for each of their ideas. Learners could then conclude this with a justification, with support material, of why their chosen venture would be successful and an evaluation of the challenges it will face.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

This unit links to all other units in the programme. As an introductory unit, it is fundamental to and supports all other units in the programme. Most specifically, however, this unit links to:

- Unit 4: Launch and Run an Enterprise
- Unit 7: Social Enterprise
- Unit 8: Entrepreneurship and Intrapreneurship in Practice
- Unit 9: Innovation and Enterprises

Learners who have completed this qualification in a year may progress to further learning at level 3, for example, to a larger size BTEC National in the enterprise sector.

When studied with other qualifications in the study programme, learners can progress into higher education on combined courses. Learners could also progress on to higher apprenticeships in areas such as business administration, marketing, accounting, sales or enterprise. This qualification will also give learners the skills to enter self-employment.

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Enterprise and Entrepreneurship. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

### Journals

*Business Review (Philip Allan Magazines)* – A journal designed for Business Studies learners that includes relevant theoretical articles, as well as information on companies and markets.

*EBEA* – Economics and Business Educators Association produces magazines for business, economics and enterprise educators in order to continually drive up standards.

*The Economist* – The Economist print edition is a weekly economics and business journal that has regular articles and features about issues related to the economy. It has an extensive archive of relevant materials.

### Videos

Episodes of The Apprentice (<http://www.bbc.co.uk/programmes/b0071b63>)

Episodes of the Canadian version of Dragons' Den ([www.cbc.ca/dragonsden/episodes](http://www.cbc.ca/dragonsden/episodes))

Live pitch videos from the UK Business Angels Association (<http://www.ukbusinessangelsassociation.org.uk/services-for-entrepreneurs/support-and-advice/live-pitch-presentations/>)

TED-Ed offers a variety of relevant education videos (<http://ed.ted.com>)

TED offers online videos of short, powerful talks (18 minutes or less) covering almost all topics ([www.ted.com](http://www.ted.com))

YouTube offers a variety of short videos and lectures. It also has links to episodes of Dragons' Den and Shark Tank. ([www.youtube.com](http://www.youtube.com))



## Podcasts

[www.eofire.com](http://www.eofire.com) – Entrepreneurs on Fire.

<http://helpmybusiness.com> – Help My Business is a free, weekly web TV show that helps entrepreneurs and small business owners to build a better business.

[www.thebusinesspodcast.co.uk](http://www.thebusinesspodcast.co.uk) – The Business Podcast is a weekly podcast to all tutors and learners on current business topics using contemporary, relevant online newspaper articles. Subscription is free.

## Websites

<http://blog.hubspot.com/blog/tabid/6307/bid/34238/The-Marketer-a-Guide-to-Developing-a-Strong-Brand-Identity.aspx> – Blog giving guidance on developing a strong brand identity.

<http://www.britishchambers.org.uk/find-your-chamber> – Your Local Chamber of Commerce runs networking events so that you can make links with local businesses in your area.

<http://www.businesslaunchpad.org.uk> – Business Launchpad runs free 'Start your own Business' workshops that are free for 16–30 year olds.

<http://www.cnbc.com/2015/09/19/10-oddball-us-inventions-that-reaped-millions.html> – Quirky ideas that reaped millions.

[www.crowdfunder.co.uk](http://www.crowdfunder.co.uk) – Crowdfunding website.

[www.deborahmeaden.com](http://www.deborahmeaden.com) – Deborah Meaden's website with examples of projects funded by her investment.

<http://www.deborahmeaden.com/investment/grip-it-fixings> – Grip It Fixing's patents.

<http://www.enterprise.ac.uk/index.php/resources/case-studies> – Enterprise Educators UK is the national network for enterprise educators. Members post case studies that demonstrate the impact of enterprise and entrepreneurship education.

<https://www.enterprise-catalyst.co.uk> – Enterprise Catalyst is a useful site to find out how enterprising you are, with a free skills-type audit to complete.

[www.entrepreneur.com](http://www.entrepreneur.com) – Online entrepreneur magazine, also available as an app on iTunes.

<https://www.facebook.com/zuck> – You can follow Mark Zuckerberg on Facebook to see how he uses technology to bring about social and technological change.

[www.gew.co](http://www.gew.co) – Global Entrepreneurship Week – world's largest celebration of the investors and job creators who launch start-ups that bring ideas to life, drive economic growth and expand human welfare.

[www.gov.uk/business-finance-support-finder](http://www.gov.uk/business-finance-support-finder) – Government website to help businesses find financial support.

<https://www.gov.uk/new-enterprise-allowance> – New Enterprise Allowance can provide money and support to help you start your own business if you are getting certain benefits.

[www.gov.uk/starting-up-a-business/get-funding](http://www.gov.uk/starting-up-a-business/get-funding) – Government funding website.

<https://www.indiegogo.com/> – Indiegogo is the world's largest crowdfunding organisation.

<https://www.kickstarter.com/> – Kickstarter is a global crowdfunding platform



<https://www.lepnetwork.net/> – Local Enterprise Partnerships website – information on Enterprise Zones, Growth Hubs and Enterprise libraries.

[www.oxonbe.co.uk](http://www.oxonbe.co.uk) – Example of local information for would-be entrepreneurs.

<http://pestleanalysis.com> – Pestle analysis provides examples of businesses' PESTLE analysis and provides case studies for use with learners.

[www.peterjonesfoundation.org](http://www.peterjonesfoundation.org) – The Peter Jones Foundation runs national campaigns to help and support young and budding entrepreneurs.

[https://www.princes-trust.org.uk/help-for-young-people/support-starting-business?gclid=Cj0KEQjw4fy\\_BRCX7b6rq\\_WZgIOBEiQAI78nd0uHcNfCyCAJ2VESGT8iX6NZ7YV0HGAvZEndf2TudTAaAvrG8P8HAQ](https://www.princes-trust.org.uk/help-for-young-people/support-starting-business?gclid=Cj0KEQjw4fy_BRCX7b6rq_WZgIOBEiQAI78nd0uHcNfCyCAJ2VESGT8iX6NZ7YV0HGAvZEndf2TudTAaAvrG8P8HAQ) – The Prince's Trust offers grants, support and mentors to young people aged 13–30 to help set up their own businesses.

[www.slideshare.net](http://www.slideshare.net) – Slideshare has a number of resources including coverage of entrepreneurship.

[www.speakers4schools.org](http://www.speakers4schools.org) – Speakers for Schools is a UK-based charity providing secondary schools and colleges with talks from a range of industry professionals, public figures and academics, free of charge.

<http://startups.co.uk/> – Startups offers independent advice and information to people starting their own business.

<http://www.stuff.tv/features/dysons-greatest-inventions-ballbarrow-airblade> – Information on James Dyson's many innovations.

<http://www.teachthought.com/critical-thinking/10-team-building-games-that-promote-critical-thinking/> – Activities for promoting strategic thinking.

<https://www.tes.com/teaching-resource/introduction-to-branding-6028381> – Lesson presentation and resources introducing branding.

[www.thisismoney.co.uk/money/smallbusiness/article-2363967/Sir-James-Dyson-How-come-great-invention.html](http://www.thisismoney.co.uk/money/smallbusiness/article-2363967/Sir-James-Dyson-How-come-great-invention.html) – This article explains the patents used by James Dyson.

<http://www.toms.com/improving-lives> – Toms is a social enterprise fund that promised originally that for every pair of shoes sold, one pair would be given to someone in need. This has now developed into water, schooling, etc.

<https://www.tubestart.com/> – Tubestart is the crowdfunding platform for all budding YouTubers.

<https://www.tycooninschools.com/> – Tycoon in Schools is a national competition aimed at school-age learners to help them start their own enterprises.

<http://www.ukbusinessangelsassociation.org.uk/> – UK Business Angels Association is a trade association providing funding to start-up businesses.

<http://uk.businessinsider.com/pokemon-go-cafes-shops-pubs-small-business-marketing-lures-pokestops-2016-7> – Article about how small businesses are cashing in on the Pokemon Go craze to give themselves a competitive advantage.



## UNIT 1: ENTERPRISE AND ENTREPRENEURS

<http://uk.businessinsider.com/strategies-coca-cola-used-to-become-a-famous-brand-2015-6?r=US&IR=T> – Article explaining the strategies that Coca-Cola used to become one of the world's most recognizable brands.

<https://www.young-enterprise.org.uk/> – Young Enterprise is a national competition aimed at school-age learners to start their own enterprises.

[www.zopa.com](http://www.zopa.com) – Peer-to-peer lending site.



## Unit 2: Developing a Marketing Campaign

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### Delivery guidance

#### Approaching the unit

This practical unit allows your learners to investigate the role that marketing plays in business success. You should focus on ensuring that your learners develop a sound understanding of marketing concepts and how a marketing campaign is developed. Learners will also need to be able to interpret and use data to suggest an appropriate marketing campaign for a business and justify why the campaign will suit the needs of the business.

Consumers are bombarded with marketing messages on a daily basis. Your learners should be exposed to a wide range of examples of successful and less successful campaigns. In this way, they will learn what works and will be able to use successful examples as inspiration when they come to develop their own rationale and plan for a marketing campaign.

You can use a range of delivery methods in this unit, such as:

- discussions, e.g. class and small group discussions on the principles and purposes of marketing
- individual or group presentations, e.g. covering using information to develop the rationale for a marketing campaign
- case studies illustrating marketing campaigns for both well-known and lesser-known businesses

Group work is an acceptable form of delivery, but you must ensure that each learner produces sufficient evidence on their own for assessment.

You can involve local employers in the delivery of this unit by inviting them as:

- guest speakers and providers of interview opportunities
- providers of work experience for learners, and of business materials as exemplars
- providers of visit opportunities for learners.

#### Delivering the topics

Topic A (Introduction to the principles and purposes of marketing that underpin the creation of a rationale for a marketing campaign) is an introduction to the principles and purposes of marketing that underpin the creation of a rationale for a marketing campaign. You could start with a class discussion to introduce some basic theory about the purpose of marketing and how a business' marketing objectives link to its overall corporate objectives. Ask the group to identify some well-recognised, successful brands and learners could investigate how these brands market their products. They could do this through independent internet research or by visiting a major retail environment, to help them to develop an awareness of marketing activities.



Learners must understand that marketing activity can be influenced by internal and external factors, such as cost, availability of technology and socio-economic factors. If there is a major employer in your area with a dedicated marketing department, it may be useful to approach them to arrange a guest speaker session, to discuss marketing in the real world. Your learners will also need to understand the concepts of both mass and niche markets and of market segmentation. Learners could present research on particular markets and segments within those markets to the whole group; you could ensure that the post-presentation discussion focuses on considering whether the products they have researched actually meet the needs of the target market and asking them to justify their reasoning.

Topic B is using information to develop the rationale for a marketing campaign. Ask your learners what information they think they would need in order to plan a marketing campaign and how they might find this information. Learners could then investigate real businesses and conduct their own market research. When looking at target markets and segmentation, learners should choose a different market to the one previously investigated in topic A. They should use a range of different market research methods and should also ensure that their research is valid and sufficient for the purpose. While learners do not need to have a detailed understanding of sampling techniques, a basic knowledge of sampling will help them make judgements about the overall validity of their findings.

Once they have conducted some primary and secondary research, learners should then be able to select marketing objectives for a brand, product or service and outline an appropriate marketing campaign for it. Focus on developing your learners' ability to justify their rationale for their choice using a range of techniques, such as situational analysis and competitor analysis. Justifying the rationale for a selected campaign is the first section of the external assessment and learners need to be prepared for this activity.

Topic C is planning and developing a marketing campaign. Learners must be able to develop a detailed marketing campaign and fully justify the choices that they have made. Learners will need to consider the role of the extended marketing mix in the development of a coherent marketing campaign. Learners could analyse the marketing mix for a range of products and evaluate the extent to which the chosen mix helps the product to achieve specific marketing objectives. For example, learners could look at the extended marketing mix for a product such as a carbonated drink and discuss whether this mix would allow the product to increase the business' market share or profitability.

The external assessment requires your learners to develop a rationale and develop a plan for a marketing campaign for a given product under controlled conditions. This campaign will need to include the selection of an appropriate message, a suitable marketing mix and the use of appropriate media. Learners also need to establish a budget and timeline for the campaign and discuss how they could evaluate the success of the campaign. It is important that learners have conducted prior research into the cost of different forms of advertising and other methods of promotion including online promotion. They also need to understand that the budget must be closely linked to the product/service being offered and the size of the business. To prepare your learners for this extended writing activity, give them plenty of time to practise in class with a number of different products or services. Learners could complete this activity in groups and/or individually, and present their campaign to a group of peers who could test their depth of knowledge by asking questions about the campaign.





## **Assessment guidance**

This unit is externally assessed, with a scenario provided prior to the sitting of the assessment. This scenario will give background information and some data on a specific market and a product or service. Working under controlled conditions, your learners will use this information to produce a rationale for a marketing campaign for the given product or service. The rationale will need to include the aims and objectives of the campaign, as well as suitable research data, and will consider the competition faced by the business. The rationale should also recommend timescales and use a range of tools and techniques to justify whether the campaign is appropriate and effective. It would be useful for learners to have conducted their own research into the market, product or service so that they can use this additional research to help them justify the campaign they have suggested.

Learners will then have to use their knowledge, and the rationale that they have just produced, to develop a plan for a marketing campaign for the given scenario, presented in an appropriate format. The work presented should include the marketing message, the marketing mix and their chosen media. The more practice of producing rationales and campaigns that learners have, the better prepared they will be for this controlled assessment. It would be useful to set learners a timed mock assessment activity, but only once all the teaching and learning is complete and learners are undertaking individual research on the pre-release material.



## Getting started

This provides you with a starting place for one way of delivering the unit. Activities are provided in preparation for the external assessment.

### Unit 2: Developing a Marketing Campaign

#### Introduction

Marketing is a dynamic field that contributes to the overall success of a business, with new methods of marketing developed continuously. For example, mobile marketing is becoming a key marketing medium. The aim of this unit is for learners to be able to recommend a suitable marketing campaign for a product or service.

#### Topic A – Introduction to the principles and purposes of marketing that underpin the creation of a rationale for a marketing campaign

- You could begin by having a group discussion on the different methods used to market products and services. Ask the group to consider whether they think these methods are likely to remain the same in the near future.
- Learners will require a basic understanding of the principles and purposes of marketing. They could work in small groups to produce a definition of marketing, and then work as a whole group to combine and refine the definition until they arrive at an agreed definition. They also need to understand how marketing links to wider corporate objectives, perhaps by doing a simple matching activity or quiz.
- Try to expose your learners to a range of different brands and marketing campaigns. A visit to a local shopping centre or retail park to investigate the ways in which goods and services are marketed to different audiences would be a good starting point. Learners should understand the concepts of niche and mass markets.
- Learners will need to understand that different customers have different characteristics, and that market segmentation allows marketers to get the maximum sales from the marketing budget. Develop learners' critical thinking skills by dividing the group into pairs and asking each pair to identify the different characteristics and target market segments for a range of markets, e.g. the car market or the housing market.
- Explore the internal and external influences on marketing by inviting in a visiting speaker from the marketing department of a local business. Alternatively, you could use case studies to help learners develop their understanding of the factors that shape the development of a marketing campaign. They could go on to complete an analysis of the internal and external factors on a successful campaign.

#### Topic B – Using information to develop the rationale for a marketing campaign

- This topic is particularly well suited to a range of practical research tasks. This work can help learners to build up a bank of information to use when producing a rationale for a new marketing campaign. During their investigations, learners will collect data to satisfy a range of marketing purposes, such as identifying trends or competition.
- Individually or in small groups, learners could investigate a range of different methods of primary research. Learners should focus on the benefits and drawbacks of each method so that they are able to justify why a particular research method has been chosen for a particular activity.
- Using both primary and secondary sources, learners could research a range of markets to obtain either internal or external data on a given subject, which can then be analysed using a variety of evaluation and decision-making tools. For example, internal sales records could provide data on which to base future forecasts, and external



## Unit 2: Developing a Marketing Campaign

journals or newspapers could provide data on market size or other external factors that might affect future demand.

- A decision is only as good as the data on which the decision has been based. Learners therefore need to be able to evaluate the quality and validity of the research they have undertaken. They will need to consider whether there is sufficient data or whether data from other sources such as trade journals or news articles would help improve validity. A range of case studies could help learners to practise and develop the analytical skills they will use in the external assessment.
- When justifying the rationale for their proposed marketing campaign, learners will need to use a range of evaluation and decision-making tools. Learners need to understand the basic concepts of the product life cycle and PESTLE and SWOT analysis (covered in more detail in topic C). They should be able to apply these concepts and tools to a range of data or case study stimulus material, and could present their analysis to peers.
- It would be useful for learners to investigate and analyse a range of successful marketing campaigns. The websites of successful advertising agencies would be good places to find examples.
- Give learners a practice assessment activity where learners are given a product for which they develop a full campaign rationale including budget and time scale. The sample assessment material provided could be used here or the centre could save this for a future mock exam opportunity and develop their own practice assessment brief.

## Topic C – Planning and developing a marketing campaign

- Use a range of practical and research tasks to develop the skills that learners will need to produce an appropriate marketing campaign. During teaching and learning stages, candidates will also develop analytical and evaluative skills, including the ability to conduct SWOT and PESTLE analysis.
- A key element of a learner's marketing campaign will be a fully integrated extended marketing mix. Learners will need to understand how the elements link together to form a coherent whole. They should be exposed to a wide range of marketing campaigns, through individual research, group research or case study materials which you give them. Learners will need to be able to analyse the individual elements of their chosen marketing mix and make judgements on the appropriateness of the different elements for the product or service.
- The key to the success of any campaign is the marketing message. Learners therefore need to understand the link between the marketing message and its purpose. Tutor-led discussion through the examination of a range of campaigns will help to develop this understanding. Give learners the opportunity to develop their own message content for a range of products or brands.
- An element closely linked to the marketing message is the choice of media for the campaign. There is a wide range of traditional and new media that learners could use, and they will need to explore the benefits and drawbacks of different media, both traditional and digital/mobile. Another key factor affecting media selection will be the available budget, and learners should understand the elements that go into compiling the overall campaign budget.
- In the external assessment, learners must show how they would evaluate the success of their campaign. Learners should get used to using a range of evaluative measures, such as return on investment. However, learners should also understand that return can be measured in a number of different ways, such as revenue gained, gross or net profit generated, or the number of sales or leads generated.



**Unit 2: Developing a Marketing Campaign**

- Give learners practice assessments at the end of this topic and provide feedback to help them develop their skills before the final assessment.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

Pearson BTEC Level 3 National in Business (NQF):

- Unit 1: Exploring Business.
- Unit 15: Investigating Retail Business.
- Unit 17: Digital Marketing.
- Unit 22: Market Research.

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Business. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

### Textbooks

- Coupland-Smith H, Phillips J, et al – *BTEC Level 3 National Business Student Book 1* (Pearson, 2016) ISBN 9781292126203.  
A student book covering the new BTEC Level 3 NQF course. *Unit 2: Developing a Marketing Campaign* is covered in full.
- Armstrong G, Kotler P, et al – *Marketing: An Introduction*, 2nd edition (Pearson, 2012) ISBN 9780273762607.  
A good introduction to the world of marketing and small business research.
- Kotler P, Armstrong G, et al – *Principles of Marketing*, 6th edition (Pearson, 2013) ISBN 9780273742975.  
Good sections on developing an integrated marketing mix and marketing analysis.
- Richards C, Dransfield R, et al – *BTEC Level 3 National Business Student Book 1* (Pearson, 2010) ISBN 9781846906343.  
A student book covering the previous BTEC Level 3 QCF course. It covers *Unit 3: Introduction to Marketing*, *Unit 9: Creative Product Promotion*, *Unit 10: Market Research in Business* and *Unit 12: Internet Marketing in Business*.

### Websites

- A brief summary of marketing and the 7 Ps by the Chartered Institute of Marketing (CIM):  
[www.cim.co.uk/files/7ps.pdf](http://www.cim.co.uk/files/7ps.pdf)
- A guide to effective marketing, including a flow chart of the marketing process and a marketing tool kit:  
[www.cimmarketingexpert.co.uk](http://www.cimmarketingexpert.co.uk)
- Times 100 Case studies:  
<http://businesscasestudies.co.uk/case-studies/by-topic/#axzz3kX9I2e2m>
- A guide to content marketing:  
<http://contentmarketinginstitute.com/what-is-content-marketing/>



## Unit 3: Personal and Business Finance

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### Delivery guidance

#### Approaching the unit

To complete this unit your learners will need access to a range of research materials, which could include sources of information and tools on the internet, in journals or magazines, and in books.

You could use a range of delivery methods in this unit, such as:

- discussions – class and small group discussions on the importance of finance to individuals and businesses
- individual or group presentations – covering the different types of finance available to individuals and businesses
- case studies illustrating how finance can impact on successful businesses
- video – providing evidence on successful businesses and how they grow.

You can involve local employers in the delivery of this unit by inviting them as:

- guest speakers
- providers of work experience for learners, and of business materials as exemplars
- mentors for learners.

#### Delivering the topics

For topic A, Understand the importance of managing personal finance, learners need to understand the importance of managing personal finance. You could introduce the role of money in society and how it developed from the barter system of the past. Why is money designed the way it is? Get learners to physically look at the UK coins and notes that are in circulation and visit various websites to show how notes and coins have changed over the years and introduce the role of the Bank of England. Focus on the security features of UK bank notes and the role of 'I promise to pay the bearer the sum of....' and what this represents. You could then place the learners into groups to discuss other ways to pay and explore the advantages and disadvantages of these other options. Learners could then carry out independent research on these to add depth to their understanding. Some of the methods of payment may be used already by the learners and they could discuss their own experiences of these and how they use them. You could also give examples from your own experiences to help learners understand.

You could arrange for a guest speaker from a local bank to come in and discuss the products and services they offer. Or, if this cannot be arranged, the learners



could carry out some research by visiting local banks and building societies and collecting leaflets on the different services they offer. The learners could then go through the different products and decide on the strengths and weaknesses of each. They could then draw up a timeline or personal life cycle for themselves showing when they may need to use the different financial products.

For topic B, Explore the personal finance sector, to explore the personal finance sector, it would be worth looking at differences between banks and building societies. You could give learners a list of different financial institutions and get them to use the internet to find out if they are a bank, building society or other. Look at examples of those building societies that have changed ownership and how the banking industry has changed over the last ten years. You could then ask the learners to look at the role of other financial institutions, and you may also be able to arrange a visit to the centre for your local credit union. You could have discussions about how technology has changed the way customers interact with financial institutions. Consider how online and mobile banking has made it easier to access your finances but also look at the downside of these types of technology. Learners may be able to give examples of how these have impacted on their lives.

Learners need be aware of the different types of guidance and protection available to them with regard to personal finance. It may be possible to arrange for an outside speaker from the local Citizens Advice Bureau or an independent financial adviser. Learners will need to understand the roles of the main personal finance authorities: they all have good websites that are easily accessible.

*The next four topics refer to business finance. It is worth noting, at this point, that for the exam, learners will need to know all the formulae.*

For topic C, Understand the purpose of accounting, to understand the purpose of accounting, a nice easy starter is to ask learners to list everything they know about business finance. Guide them towards looking at why it is important to businesses and look at the key terms. Once you have a list, pick a few of the main ones and discuss what the learners think they mean. At this point, it might be worth looking at debit and credit. You could use the acronyms:

- DEAD - Debit = Expenses, Assets and Drawings
- CLIC - Credit = Liabilities, Income and Capital.

The learners should then be able to understand the difference between debit and credit (very different from personal finance) and become familiar with the other key words. This will give learners a better understanding when it comes to the financial statements later on. It is also worth looking at the difference between capital and revenue.

For topic D on selecting and evaluating different sources of business finance, it is worth putting into context why the firm needs financing – is it for short-term cash flow or long-term growth. This will help learners gain a better understanding of why finance is important to businesses.

For topic E, break-even and cash flow forecasts, you could ask learners to distinguish between cash and credit and should show examples of businesses that have suffered cash flow problems in the past. Learners should practise using as many cash flow forecasts as possible and be able to draw up a forecast. It is worth using some videos at this point to show real life examples of businesses. TV programmes such as *The Fixer* on the BBC and *Dragon's Den* use key



financial terms all the time and these can really help learners understand and put it into context.

Learners will need to draw and calculate break-even. This is to enable them to identify several costs to a small business. Get them to state whether they are fixed, variable or semi-variable. Learners will need to understand the formula for break-even and apply it in the exam so the use of plenty of case studies and practice questions is recommended.

For topic F on break-even analysis, the best way for learners to fully understand the Statement of Comprehensive Income and Statement of Financial Position is to give them a template and then go through lots of practice questions. It is always useful to get learners to fill in the two statements together. Although this method seems a bit repetitive, you will be surprised how quickly learners take to it, particularly when they get the Statement of Financial Position to balance. When they start to get a hang of writing out the statements, you could then start to add the adjustments. Start with simple calculations of both methods of depreciation, accruals and prepayments, then put them into the full accounts. You may want to put learners into groups so they can help each other.

Once learners have a good understanding of the financial statements, you should introduce the ratios. You could ask learners to work out the ratios for well-known PLCs. These accounts can easily be found on the internet and then learners could analyse which would be the best company and why? Note that learners will not be given the formulae in the exam, so they will need to learn them by rote. It is therefore worth starting each lesson with a ten-minute test, perhaps encouraging learners by introducing a reward for the highest score at the end of each week.

### **Assessment guidance**

As this is an examined unit it is important that learners understand key terms and are able to apply them successfully to individuals and businesses. The unit has been divided into two types of finance across the six learning topic areas. The first part of the unit is about personal finance, while the second part of the unit covers business finance and accounting. The exam will have a section on topics A and B, and then the second section will be on topics C, D, E and F. You should encourage learners to research and learn about the different finances on a local and national level. Learners should be encouraged to bring their own experiences to the subject, particularly when it comes to the roles of personal finance and their experiences with money and bank accounts. They could talk about their attitudes towards money and how these can impact on their lifestyle.

Learners should also research finance relating to small businesses and find out how management and financial accounting can affect the business's success.





## Getting started

**This gives you a starting place for one way of delivering the unit. Activities are suggested in preparation for the external assessment.**

### Unit 3: Personal and Business Finance

#### Introduction

It is worth teaching this unit in two different parts. You may want to start with the personal finance section (topics A & B). These topics are more accessible to learners as they could have more understanding and experience of this area of the course.

#### Topic A – Understand the importance of managing personal finance

- Ask learners to get into groups and discuss 'what money is' – why is money useful? What are the different functions and roles that money plays in society?
- Ask learners to analyse the features of UK bank notes and coins and encourage them to think about why they are designed this way. Lead the discussion towards the four key functions of money and go through some examples of what cannot be used as money.
- Ask learners to research the different payment methods available in the UK. Put them into small groups and assign two or three methods from the list in the specification to each group. Ask them to look at advantages, disadvantages and examples of when each could be used. They could then present their findings back to the group. Collate all the payment methods together and hand the results back to the whole group.
- Ask the learners to research the current accounts that they have. They should look at the amount of interest that is paid, as well as other features on offer. Ask the learners to compare with others in their group and discuss who has the best current account and why, and then ask the learners to look at other types of current accounts that they may not have covered (e.g. premium).
- If possible, try to organise for a guest speaker from one of the local banks to come in and talk about the different products and services they offer. If this is not possible, ask learners to visit their local financial institutions (remember to use the Post Office and supermarkets) and collect as many leaflets as possible. When the leaflets have been collected, ask the learners to create posters on loans, overdrafts, mortgages and savings accounts.
- Ask learners to list the types of item that can be insured, then ask them to put them in order of importance to themselves. This could lead to a lively discussion and can open up debate on the risks involved in not taking out insurance.
- Ask learners to research the cost of premiums for insurance. Car insurance is the easiest to do. They could use one of the price comparison websites to find the cheapest car insurance. You could give them a few different cars to research or they could use their parents', or their own, if they have one. Ask learners to adjust certain factors – such as where the car is kept or mileage per year – and discuss why this has affected the premium quoted.

#### Topic B – Explore the personal finance sector

- Ask your learners to visit the Bank of England website and explore the different videos that are available. You could also arrange a tour of the Bank of England if



possible. Again, arranging for a guest speaker to come in is very useful and many financial institutions are very keen to help schools and colleges.

- Ask learners to compare the features of different financial institutions. You could split them into groups and give them a list of institutions to research and then feed back to the group. Collate the information together and hand back the results to learners as revision notes.
- Ask learners to look at the different objectives of the financial institutions. Focus, particularly, on building societies, credit unions and national savings and investments. Learners should then assess the importance of these institutions in the finance sector.
- Ask learners to assess the different ways in which financial institutions interact with their customers. Give them a list of financial products and get them to match them to the best communication method. Then ask them to feed back to the group and justify their choices. This opens up the opportunity for you to facilitate some discussion.
- Ask learners to come up with some areas where consumers may need protection. The main four overseeing bodies have good detailed websites that give case studies on how they can help. There has also been a lot in the news and it is worth getting the learners to research the PPI scandal. TV programmes like *Watchdog* also regularly features articles on financial issues.
- See if you can arrange a visit to the local Citizens Advice Bureau or arrange for an independent financial adviser to come and talk to the learners. This would be very useful as they could give real life examples of how they help consumers.

### Topic C – Understand the purpose of accounting

- To begin with, you need to emphasise to learners that this part of the course refers to businesses only.
- You should start by asking learners what they think accounting is. Ask them to identify the role of an accountant and why businesses use accounts. If possible, a visit from a local accountant could help explain the purpose of accounts.
- You should then introduce some simple double-entry book-keeping, looking at the relationship between debits and credits. You could ask learners to research the key terms, as highlighted in the specification.
- Ask learners to identify sources of income and expenditure for a small business. You could use the list that has been created (adding any terms from the specification that have not been mentioned already to ensure a coverage of all relevant topics) and ask learners to discuss whether these are capital or revenue.
- Explain the concept of depreciation to learners and go through the two different types for straight-line and reducing balance. Ask learners to use case studies to increase their understanding. Remember that no formulae will be given to learners in the exam.

### Topic D – Select and evaluate different sources of business finance

- Learners should research the different sources of finance available to businesses. Learners could then present their findings. You could then give some suitable case studies so that learners can identify which sources of finance would best suit particular situations. This could lead to discussion on advantages and disadvantages of different sources of finance. There may be some disagreement between learners.
- Learners should be given a table from which to select internal or external sources of



finance and they should suggest those sources of finance which are short-term and long-term solutions to business problems.

### **Topic E – Break-even and cash flow forecasts**

- Learners should understand the importance of cash flow to a business. This could be taught using a case study approach and learners should look at the influence that poor cash flow forecasting can have on a business.
- Learners should practise completing as many cash flow forecasts as possible. Learners could be asked to create a cash flow forecast from given figures as well as analyse how the business could improve its cash flow position.
- Learners should research the different types of costs that impact on a business and identify the formula for break-even. Again, a case study approach is useful as it will allow learners to identify the key figures needed to calculate break-even or to draw the break-even chart. Working in small groups or pairs is particularly useful as it helps learners gain confidence.
- Ask learners to work through several case studies until they are confident with drawing the charts and calculating break-even. You could then introduce the concepts of margin of safety and contribution. Give many opportunities for practising so as to improve learners' confidence.

### **Topic F – Complete statements of comprehensive income and financial position and evaluate a business's performance**

- Give learners a template of the Statement of Comprehensive Income and go through the main parts of the statement. You could then complete one with the group and then give them some figures so that they can practise them.
- Give learners a template of the Statement of Financial Position and go through the main parts of the statement. You could then complete one with the group and then give them some figures so that they can practise them.
- After they have completed the above, give learners a list of figures that allows them to complete Statements of Comprehensive Income and Financial Position. Allow them to use the template as a guide if they still need assistance and encouragement. Exercises can be found in accounting books or on the internet.
- You could then introduce the concepts of accrual and prepayments to the learners, as well as show where depreciation affects the accounts. Then allow learners to practise this with lots of different questions and case studies. Getting learners to work in pairs or small groups is a good way to develop their understanding.
- Once learners have a good understanding of the different financial statements, you could move on to ratios. To help them learn these ratios, you could assign weekly ten-minute tests, or use bingo cards. For this, ask learners to write the names of the ratios down and then show them pictures of the ratios on PowerPoint slides for them to tick off.
- Learners should use their work on statements as a basis for calculating ratios. You could ask learners to look at published accounts and compare two well-known PLCs. Please note that these accounts can sometimes be very complicated and can confuse weaker learners, so do use with caution.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

Pearson BTEC Level 3 Nationals in Business (NQF):

- Unit 7: Business Decision Making.
- Unit 10: Recording Financial Transactions.
- Unit 11: Final Accounts for Public Limited Companies.
- Unit 12: Financial Statements for Specific Businesses.
- Unit 13: Cost and Management Accounting.

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Business. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

## Textbooks

- Sangster A and Woods F – *Business Accounting: WITH MyLab Vol.1* (Pearson, 2015) ISBN 9781292088549.  
This 'classic' Business Accounting textbook, covers all the basics of business finance that are covered in this unit. It goes beyond the scope of this unit but is a useful reference text.
- Harrison I – *Introducing Accounting for AS*, 2nd edition (Hodder Education, 2008) ISBN 9780340959404.  
This learner-friendly text gives a solid introduction to accounting principles.

## Journals

- *Business Review* (Philip Allan Magazines)  
A journal designed for Business Studies learners that includes relevant theoretical articles, as well as information on companies and markets.

## Websites

- [www.bankofengland.co.uk/education](http://www.bankofengland.co.uk/education)  
A useful website with videos and resources.
- [www.fca.org.uk/consumers](http://www.fca.org.uk/consumers)  
A useful website from the Financial Conduct Authority, the regulator of the UK banking industry.



- [www.moneysavingexpert.com](http://www.moneysavingexpert.com)  
A useful website for articles on personal finances from Martin Lewis, money management guru.
- [www.s-cool.co.uk](http://www.s-cool.co.uk)  
This site contains business education resources for revision with case studies, simulations and worksheets.
- [www.telegraph.co.uk/finance/personalfinance/](http://www.telegraph.co.uk/finance/personalfinance/)  
Useful articles on personal finance. Some very good case studies.
- [www.thisismoney.co.uk](http://www.thisismoney.co.uk)  
A website containing useful articles on personal finance and some very good case studies.
- [www.beta.tutor2u.net/](http://www.beta.tutor2u.net/)  
This site gives resources and revision materials. There are also links to other sources of information.



## Unit 4: Launch and Run an Enterprise

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### Delivery guidance

#### Approaching the unit

This unit allows your learners to experience what it is like to launch and run their own enterprise. This is therefore a very practical unit and will enable your learners to understand what is involved in running their own enterprise, as this could provide a viable employment route for them once completing their qualification.

You will need to give learners the facilities and the time for them to run their enterprise, comprising around half the guided learning hours for this unit. The building of creativity, problem-solving and planning skills is vital to completing this unit successfully.

The launching and running of the enterprise can be done as a team exercise; however, each learner will need to produce their own individual evidence as to the achievement of the criteria. You will need to ensure that the enterprise is run over a significant period of time. Due to this, it is advised that you teach this unit 'long and thin'.

#### Delivering the learning aims

You can best introduce learning aim A by organising a guest speaker to talk to learners, in the form of a local entrepreneur who has set up their own business. Ask them to explain to the learners the process that they went through to set up their enterprise and the research that they undertook, and ask them to talk about:

- their target market
- how they identified their customers' needs
- how they identified gaps in the market
- how they identified opportunities for their products or services
- how they calculated their potential demand
- how they considered the economic climate
- how they considered risks and their competitors.

Learners can then use this information to help inform them in their planning for their own enterprise and the importance of this necessary step when setting up their own enterprise. You will need to ensure that learners have access to appropriate research tools so that they can assess the financial feasibility of their enterprise. You could set up the opportunity for learners to visit a local bank and access their business plan templates so that learners are aware of what they need to consider when completing their plan. Alternatively, you could arrange a talk from one of the local small business banking managers, which would help to inform learners what to include. Learners will then need to complete their own feasible business plan.

Similarly, for learning aim B, learners will again need access to appropriate research tools so that they can identify the wants and needs of their customers and their marketing strategy. You could set up a discussion board on Padlet (or other appropriate platform) and ask learners to discuss the importance of researching and identifying the wants and needs of their customers. Learners could then research different methods of identifying their customers' needs and wants and decide how they will undertake this. Learners will then need to consider their marketing strategy and this could be done through a case study initially. You will need to give learners appropriate case study material so that they can consider a high-level marketing strategy encompassing an appropriate plan for the 4 Ps. Apple is a good example for this, given their big product launches, Apple shops,



associated services (iTunes) and varying prices and high competition in the market from the likes of Samsung. You could then ask learners to create a recording of their initial ideas for their marketing strategy and how they believe this will appeal to their target market.

In order to introduce learning aim C, you could ask learners to evaluate and give feedback on the enterprise ideas of others in the group. Ensure that each member gives constructive feedback; this could be done through quizzes and polls on Socrative/Kahoot, or through a SurveyMonkey type questionnaire that learners complete based on each other's ideas. You then need to ensure that learners revise their enterprise ideas, taking into account the feedback they have received. It is also important for you to contribute to this exercise for each learner by giving them constructive criticism and feedback. If possible, local entrepreneurs or small business bank managers could also feed into this process by reviewing learners' enterprise ideas.

You could then either encourage learners to set up their own enterprises or set learners up to work with one of several organisations that can support learners, such as Young Enterprise and Tycoon in Schools. Learners can work in groups in order to set up their enterprises; however, you will need to ensure that appropriate levels of learners are put together and that these groups should be no larger than four to ensure that each individual plays a significant part in the running of the enterprise. Using Kahoot/Socrative, you could set up a poll or discussion board to gather learners' ideas as to what research needs to be undertaken. You should ensure that this covers the legal format, the associated benefits and drawbacks of each, the resources that they will need, and how they will monitor the performance of their enterprise. You will then need to ensure that the enterprise is run over a significant period of time. Due to this, it is advised that you teach this unit 'long and thin'. In order to set learners up for the achievement of D.P6, you will need to ensure that they gain sufficient and appropriate customer feedback. This could be in the form of questionnaires and evaluations, either given at the time of purchase, or emailed post-purchase.

For learning aim D, learners will need to use feedback gained from customers, and financial data to detail the outcomes of the enterprise. Therefore, the projected financial data they produced in their business plan in learning aim A will need to be analysed against their actual financial performance when running their enterprise. You will need to ensure that learners are aware of the need to keep up-to-date financial information during the running of their enterprise, including when they have met key targets as per their business plan, as they will need to analyse their cash flow, income statement and statement of financial position. You will then need to ensure that learners can present the outcomes of their enterprise to an external audience. This audience could be a local business owner, local small business bank manager or mentor from Young Enterprise. Please also consider the use of parents who may also hold some of these roles. You could show learners examples of good and poor reports and ask them to analyse these.

In addition, showing them clips of good and poor business presentations from Shark Tank or YouTube could serve to prepare learners for their presentation. You could put these clips on Socrative or another appropriate online sharing app and create a poll or discussion board for learners to comment on what is good practice and what is poor practice. You also need to ensure that learners' reports have appropriate appendices containing a log of daily activities and records of practical activity, completed by you or other appropriate witnesses.



**Assessment model (in internally assessed units)**

Learning aim	Key content areas	Recommended assessment approach
<p><b>A</b> Research and develop a plan to launch an enterprise</p>	<p><b>A1</b> Research an opportunity for a product or service  <b>A2</b> Research the financial feasibility of the enterprise  <b>A3</b> Develop a plan for the enterprise</p>	<p>A clear and concise plan for a proposed enterprise that would be appropriate for a potential investor. The plan will give an overview of the enterprise idea, its feasibility, and show knowledge of the market, figures and forecasts together with the risks and opportunities involved, including a marketing plan outlining the strategies to be used to launch the enterprise</p>
<p><b>B</b> Develop a marketing strategy to launch the enterprise</p>	<p><b>B1</b> Research information to identify the needs and wants of customers  <b>B2</b> Marketing strategy</p>	
<p><b>C</b> Run an enterprise</p>	<p><b>C1</b> Enterprise set-up  <b>C2</b> Resources  <b>C3</b> Performance and monitoring</p>	<p>A report, including financial data and customer feedback, evaluating the enterprise. Appendices to the report will include: a diary/log of day-to-day activities carried out while running the enterprise together with appropriate observation records/witness statement, weekly accounts.</p>
<p><b>D</b> Review the outcomes of the enterprise</p>	<p><b>D1</b> Use financial data  <b>D2</b> Customer feedback  <b>D3</b> Create and present final report</p>	





## Assessment guidance

This unit is internally assessed through a number of tasks. Each task should cover at least one entire learning aim and it is essential that a learning aim is assessed as a whole, and not split into tasks or sub-tasks per criterion. There are a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aims: A and B (A.P1, A.P2, B.P3, A.M1, B.M2, AB.D1)

Learning aims: C and D (C.P4, C.P5, D.P6, D.P7, C.M3, D.M4, C.D2, D.D3).

All learners must work independently and generate their own evidence towards the achievement of the learning aim(s) and this must be appropriately authenticated. However, due to the practical nature of this unit, the enterprises can be run in groups of not more than four learners per group so that each learner plays a significant role in the running of the enterprise to ensure the achievement of the assessment criteria. The unit specification suggests a plan for learning aims A and B and a report for learning aims C and D. Learners should ensure that research is fully referenced with a bibliography.

For the assessment of learning aims A and B, learners are recommended to produce a clear and concise business plan. They must research an appropriate enterprise opportunity including the financial feasibility and then develop their business plan. They will then need to research the wants and needs of their potential customers and how they will fulfil these and then consider their marketing strategy, based on these potential customers.

Learners will also need to consider their marketing strategy, including the marketing mix in order to launch the enterprise. They will need to show their research of their potential market for their product or service. In order to do this, they will need to show evidence of an outline of their product or service, the unique selling point (USP), how this links to their target market and market segments. They will need to consider the price of their product, including strategies and tactics. For the promotional mix, they will need to consider how this links to their target market and market segmentation, how technology will be utilised to promote their products or services and how they may obtain feedback from customers based on this. Finally, learners will need to consider how they will distribute their products or services.

They will also need a section on how they will measure their success and finally, they will need appendices, which could include the personal profile of the owner(s) and how they will make decisions.

For the assessment of learning aims C and D, learners are recommended to complete a report that will also be presented to an external audience. The report must include financial data, customer feedback and appendices including a log of the day-to-day running of the business and records of practical activities completed by you.



## Getting started

**This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.**

### Unit 4: Launch and run an enterprise

#### Introduction

This is a practical unit, which requires learners to launch their own enterprise and run it appropriately. Learners can do this in groups, but you must ensure that each learner produces their own evidence towards the achievement of the assessment criteria. Learners will need at least half the guided learning hours for learning aim C – the running of the enterprise.

#### Learning aim A – Research and develop a plan to launch an enterprise

- You could start this unit by taking learners on a walk to their local high street, or alternatively, show pictures or Google Earth images of the high street and share these on Socrative/Moodle. The purpose of this is for learners to consider any potential enterprise opportunities. Learners may be considering online ventures, e.g. production of an app, or 'clicks' enterprises, distributed only online. All of these may be appropriate. A SurveyMonkey survey or poll on Socrative/Kahoot could provide a starting point for your learners to consider potential gaps in the market, customer needs and market trends.
- You could then set up a discussion on Padlet, or another appropriate discussion platform, so that learners can discuss target markets, identify customer needs, gaps in the market, opportunities for a product or service, current market trends, potential demand and review the current economic climate and potential risks and competitor analysis.
- You should then ask learners to narrow their potential enterprise ideas down. If you decide that learners are to operate in groups in order to launch and run their enterprise, you will need to organise these groups appropriately. Groups should be no larger than four, as each learner needs to have significant input into the running of the enterprise. If you decide to run enterprises in groups, learners still need to produce their own individual evidence towards the assessment criteria. You may want to consider the use of an external organisation, such as Young Enterprise or Tycoon in Schools, in order to help with the launching and running of learners' enterprises, and these organisations will sometimes also provide business mentors.
- You will need to ensure learners understand how to complete a profit/loss and break-even chart and calculate margin of safety. You could do this by using case study materials that are appropriate for small businesses.
- You should then allow learners access to a range of research tools in order for them to consider how much finance is required to launch and run their business.
- Organise for learners to visit their local banks and obtain copies of their templates for business plans. These could then be looked at as a group and shared on a Moodle platform and you can lead a discussion about the various imperative parts of a business plan. You could then give learners a copy of a poor business plan and ask learners to assess it and add in what else needs to be included.
- You could then use the photos or Google Earth images reviewed at the start of the unit and ask learners to research the types of organisations and the legal format and ownership of each. You will also need to make sure they consider the legal formalities of each type of ownership. Learners can then discuss the most appropriate legal format for their start-up enterprise.
- Once learners have decided on their chosen enterprise and their legal format, you



should ensure that these are appropriate prior to learners' launch and if so, ask them to start putting together their business plans. Learners then need to research their competitors and analyse the impact they may have on the running and success of their enterprise.

- Learners could then create a spider diagram of what they believe are their success indicators, both financially and non-financially. You could then give them case studies of small businesses showing both financial and non-financial success factors.
- Invite a guest speaker (a small business owner or speaker from speakers4schools or local small business bank manager) to talk to learners about business plans and ask them to review and provide feedback on some of the learners' business plans.

### **Learning aim B – Develop a marketing strategy to launch the enterprise**

- Knowledge and understanding of marketing could be brought from other units within this qualification, e.g. Unit 2.
- You will need to ensure that you allow learners access to a range of research tools, both primary and secondary. Learners need to research their target market, the market segment, size, structure, trends and competition.
- You could then give learners a range of branded products to consider, e.g. a can of cola, a mobile phone. Ask them to consider the 4 Ps for these products and the appropriateness of them and how the 4 Ps link together for each product. You could then lead a discussion on the appropriateness of the 4 Ps for products and services.
- For each of these products, you could ask learners to complete a poll on Socrative/Kahoot about the USP, target market, pricing strategies, promotional mix, segmentation, use of technology and distribution channels.
- Learners could then discuss their marketing strategy for their enterprise's products/services.
- Learners then need to have time to write their business plans.

### **Learning aim C – Run an enterprise**

- Learners will need at least half the guided learning hours for this unit to run the enterprise.
- Using the same Google images or photos of the local businesses as you reviewed earlier in the unit, you could ask learners to research the different legal formats and then decide the type of legal format for each business. They should then research the legal formalities for each of these. They then need to decide on the appropriate format for their enterprise and the reasons for their choice. They will also need to consider any appropriate health and safety requirements.
- Learners will also need to consider the resources necessary for the running of their enterprise, i.e. are premises necessary? If so, where will they be? What equipment is needed? What are the personnel requirements? What are your sources of finance?
- You will need to ensure that learners are completing day-to-day logs of the running of the enterprise, as this is necessary for learning aim D. This could include meetings, reviews of performance against their targets, review of the performance of their promotion strategies, review of financial performance, review of sales forecasts and relationships with supplier and so on.

### **Learning aim D – Review the outcomes of the enterprise**

- Learners will need to reflect on the performance of the enterprise and make recommendations as to how it could have been improved.



- Learners will need to review the financial data of their enterprise; this should include cash flow, variance analysis, income statement, statement of financial position and ratio analysis. This could be done in the group that they have been working in and produced in the final report to the external audience. They will need to analyse these financial data.
- You should also ensure that learners have obtained feedback from their customers, as this is necessary for the external report. This could have included questionnaires from customers, asking customers to complete SurveyMonkey surveys on an iPad or tablet at the store, feedback and comments from a Facebook or social media page set up for the enterprise, focus groups and so on. These results should then be analysed and again included in the report.
- You could then give learners an example of a good and one of a poor formal report. Learners could then make comments on a discussion board, e.g. on Padlet, as to what needs to be included in a formal report. This should then inform their own reports.
- You will need to arrange for an external audience to be present for learners to formally present their report to. This could be mentors that you have used during the launch and the running of the enterprise, the local small business bank manager, parents who may be small business owners, or local entrepreneurs.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

This unit links to a number of other units in the programme. Most specifically, however, this unit links to:

- Unit 1: Enterprise and Entrepreneurs
- Unit 2: Developing a Marketing Campaign
- Unit 3: Personal and Business Finance
- Unit 6: Business Decision Making

Learners who have completed this qualification in a year may progress to further learning at level 3, for example, to a larger size BTEC National in the enterprise sector.

When studied with other qualifications in the study programme, learners can progress into higher education on combined courses. Learners could also progress onto Higher Apprenticeships in areas such as business administration, marketing, accounting, sales or enterprise. This qualification will also give learners the skills to enter self-employment.

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Enterprise and Entrepreneurship. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

### Textbooks

Burns P, *Entrepreneurship and Small Business* (3rd edition), Palgrave MacMillan, 2010, ISBN 0230247806 – outlines good management practice for learners and encourages and develops entrepreneurial skills

Deakins D and Freel M, *Entrepreneurship and Small Firms* (6th edition), McGraw-Hill Higher Education, 2009, ISBN 0077136454 – provides a thorough coverage of entrepreneurial and small firm theory, concepts, evidence and practice

### Journals

*Business Review* (Phillip Allan Magazines) – a journal designed for Business Studies learners that include relevant theoretical articles, as well as information on companies and markets

*The Economist* – The Economist print edition is a weekly economics and business journal that has regular articles and features about issues related to the economy. It has an extensive archive of relevant materials.

EBEA – Economics and Business Educators Association produces magazines for business, economics and enterprise educators in order to continually drive up standards.

### Videos

Episodes of the Canadian version of Dragon's Den ([www.cbc.ca/dragonsden/episodes](http://www.cbc.ca/dragonsden/episodes))

TED-Ed offers a variety of relevant education videos (<http://ed.ted.com>)

TED offers online videos of short, powerful talks (18 minutes or less) covering almost all topics ([www.ted.com](http://www.ted.com))

YouTube offers a variety of short videos and lectures. It also has links to episodes of Dragons' Den and Shark Tank. ([www.youtube.com](http://www.youtube.com))

Episodes of The Apprentice (<http://www.bbc.co.uk/programmes/b0071b63>)

Episodes of Shark Tank (<http://abc.go.com/shows/shark-tank>)



Live pitch videos from the UK Business Angels Association (<http://www.ukbusinessangelsassociation.org.uk/services-for-entrepreneurs/support-and-advice/live-pitch-presentations/>)

### **Podcasts**

[www.eofire.com](http://www.eofire.com) – Entrepreneurs on Fire

[www.thebusinesspodcast.co.uk](http://www.thebusinesspodcast.co.uk) – The Business Podcast is a weekly podcast to all tutors and learners on current business topics using contemporary, relevant online newspaper articles. Subscription is free.

<http://helpmybusiness.com> – Help My Business is a free, weekly web TV show that helps entrepreneurs and small business owners to build a better business.

### **Websites**

<http://www.britishchambers.org.uk/find-your-chamber> – Your Local Chamber of Commerce runs networking events so that you can make links with local businesses in your area.

<http://www.businesslaunchpad.org.uk> – Business Launchpad runs free 'Start your own Business' workshops that are free for 16–30 year olds.

<http://www.cnn.com/2015/09/19/10-oddball-us-inventions-that-reaped-millions.html> – quirky ideas that reaped millions

[www.crowdfunder.co.uk](http://www.crowdfunder.co.uk) – crowdfunding website

[www.deborahmeaden.com](http://www.deborahmeaden.com) – Deborah Meaden's website with examples of projects funded by her investment

<http://www.enterprise.ac.uk/index.php/resources/case-studies> – Enterprise Educators UK is the national network for enterprise educators. Members post case studies that demonstrate the impact of enterprise and entrepreneurship on education.

[www.entrepreneur.com](http://www.entrepreneur.com) – online entrepreneur magazine, also available as an app on iTunes

[www.gew.co](http://www.gew.co) – Global Entrepreneurship Week – world's largest celebration of the investors and job creators who launch start-ups that bring ideas to life, drive economic growth and expand human welfare

[https://www.google.co.uk/intl/en\\_uk/earth/](https://www.google.co.uk/intl/en_uk/earth/) – images of areas learners could use to find gaps in the market

[www.gov.uk/business-finance-support-finder](http://www.gov.uk/business-finance-support-finder) – government website to help businesses find financial support

<https://www.gov.uk/new-enterprise-allowance> – New Enterprise Allowance can provide money and support to help you start your own business if you are getting certain benefits.

<http://www.gov.uk/starting-up-a-business/get-funding> – government funding website

<https://www.gov.uk/write-business-plan> – government support to write a business plan and exemplar business plans

<https://www.indiegogo.com/> – Indiegogo is the world's largest crowdfunding organisation.

<https://www.kickstarter.com/> – Kickstarter is a global crowdfunding platform.

<https://www.lepnetwork.net/> – Local Enterprise Partnerships website – information on Enterprise Zones, Growth Hubs and Enterprise libraries

<http://www.marketingdonut.co.uk/marketing/marketing-strategy/your-target-market/six-steps-to-defining-your-target-market> – Marketing donut helps learners to define their own target market.



<https://www.marketingweek.com/2016/01/27/why-apple-is-looking-to-shift-brand-perceptions-to-become-more-than-just-the-iphone-maker/> – case study from Marketing Week about Apple’s product struggles

<http://ofn.org/what-cdfi> – Community development financial institutions (CDFIs) are private financial institutions that are 100% dedicated to delivering responsible, affordable lending to help low-income, low-wealth and other disadvantaged people and communities join the economic mainstream.

[www.oxonbe.co.uk](http://www.oxonbe.co.uk) – example of local information for would-be entrepreneurs

<http://panmore.com/apple-inc-marketing-mix-4ps> – Apple Inc’s 4 Ps

[www.peterjonesfoundation.org](http://www.peterjonesfoundation.org) – The Peter Jones Foundation runs national campaigns to help and support young and budding entrepreneurs.

[https://www.princes-trust.org.uk/help-for-young-people/support-starting-business?gclid=Cj0KEQjw4fy\\_BRCX7b6rq\\_WZgI0BEiQAI78nd0uHcNfCyCAJ2VESGT8iX6NZ7YV0HGAvZEndf2TudTAaAvrG8P8HAQ](https://www.princes-trust.org.uk/help-for-young-people/support-starting-business?gclid=Cj0KEQjw4fy_BRCX7b6rq_WZgI0BEiQAI78nd0uHcNfCyCAJ2VESGT8iX6NZ7YV0HGAvZEndf2TudTAaAvrG8P8HAQ) – The Prince’s Trust offers grants, support and mentors to young people aged 13–30 to help them set up their own businesses.

[www.slideshare.net](http://www.slideshare.net) – Slideshare has a number of resources including coverage of entrepreneurship.

<http://www.slideshare.net/OmarHussein3/report-writing-29015253> – Slideshare presentation on report writing

[www.speakers4schools.org](http://www.speakers4schools.org) – Speakers for Schools is a UK-based charity providing secondary schools and colleges with talks from a range of industry professionals, public figures and academics, free of charge.

<http://startups.co.uk/> – Startups offers independent advice and information to people starting their own business.

<http://www.telegraph.co.uk/business/2016/06/02/bhs-was-a-case-study-in-how-not-to-be-a-retailer-in-the-21st-cen/> – an article on the demise of BHS

<https://www.tubestart.com/> – Tubestart is the crowdfunding platform for all budding YouTubers.

<https://www.tycooninschools.com/> – Tycoon in Schools is a national competition aimed at school-age learners to help them start their own enterprises.

<http://www.ukbusinessangelsassociation.org.uk/> – UK Business Angels Association is a trade association providing funding to start-up businesses.

<http://uk.businessinsider.com/strategies-coca-cola-used-to-become-a-famous-brand-2015-6?r=US&IR=T> – an article explaining the strategies that Coca-Cola used to become one of the world’s most recognizable brands

<https://www.young-enterprise.org.uk/> – Young Enterprise is a national competition aimed at school-age learners to start their own enterprises.

[www.zopa.com](http://www.zopa.com) – peer-to-peer lending site

*Pearson is not responsible for the content of any external internet sites. It is essential for tutors to preview each website before using it in class so as to ensure that the URL is still accurate, relevant and appropriate. We suggest that tutors bookmark useful websites and consider enabling learners to access them through the school/college intranet.*



## Unit 5: Survival and Growth

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### Delivery guidance

#### Approaching the unit

Your learners are likely to have chosen to study this BTEC National programme because they have an interest in, or desire to start up their own business. This unit will help learners to develop an understanding of how innovation is essential for enterprises to grow and survive in a competitive market. Learners will study the factors that influence the survival of enterprises and consider the strategies that can influence their growth and future direction. They will also investigate the reasons why enterprises fail, looking at both internal and external factors in the business environment.

Learners should be encouraged to research and learn about enterprises, and look at case studies and examples they have studied in previous units, including Unit 1. They should look at the factors that influence survival and failure. Encourage them to explore the ways in which growth can be measured and growth strategies, plus the exit strategies that can be considered by the owner of an enterprise.

To complete this unit your learners will need access to a range of research materials, which could include the internet, journals or magazines and books. You can use a range of delivery methods in this unit, for example:

- discussions – class and small group discussions on enterprises that have survived, and those that have failed individual or group presentations
- case studies – illustrating survival and growth and leading to practical tasks
- visits to local businesses or guest speakers
- video – providing talks.

Group work is an acceptable form of delivery, but you must ensure that learners individually produce evidence that is sufficient for assessment.

#### Delivering the learning aims

For learning aims A (explore the factors which influence the survival of an enterprise) and B (examine the ways in which business growth can be measured), you can introduce the topics by using real examples of enterprises that have survived, and those that have failed. Learners can share their knowledge of different enterprises, and what they believe contributes to their survival and growth. Look back at examples used in units you have already covered and refer to examples that learners are familiar with.

Ask learners to identify some of the physical and human resources that an enterprise would need, and discuss why these resources have to be well managed. Case studies featuring appropriate enterprises can be provided to learners for them to interrogate.

In small groups, your learners can then carry out secondary research, using the internet or other sources, of enterprises that have survived and grown. This could be followed by primary research consisting of independent or accompanied visits to different sized enterprises in the local area that have been set up by entrepreneurs. This will help learners to prepare a report on success and growth. Small groups or pairs would be most suitable for carrying out this task.





You may also be able to enlist the help of local entrepreneurs to enhance your learners' experience. You could ask these entrepreneurs to advise groups of learners on how to prepare formal and informal presentations that evaluate the impact on resource requirements at different stages in the product lifecycle. These could relate to growth measures, including sales turnover, market share and profit margins. These same entrepreneurs could be the audience for those presentations, and provide feedback afterwards.

For learning aims C (investigate the reasons why some enterprises might fail) and D (explore the growth and exit strategies which could be considered by the owners of an enterprise), you could introduce the topics with a presentation that explains the key terms that might be used when looking at internal and external factors. Set up group discussions for learners that clarify these terms further. You can invite guest speakers from successful enterprises to visit your centre to present and discuss the reasons why some enterprises fail. If this is not possible, case studies for appropriate enterprises can be provided for learners to interrogate. In small groups, your learners can carry out website research on internal and external factors. Learners may also be able to gather information from work experience placements or their part-time jobs.

Learners can prepare and deliver presentations on either growth strategies or exit strategies to small groups of their peers. Learners should then be encouraged to ask appropriate questions. Set suitable questions, or review questions put forward by learners prior to the presentation to ensure that both presenters and viewers are getting the most out of this activity. You can provide initial input for your learners using case studies to look at such strategies.



### Assessment model

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Explore the factors which influence the survival of an enterprise	<b>A1</b> Management of physical and human resources <b>A2</b> Role of technology on enterprise operations <b>A3</b> Influence of technology in the market	A report that uses business and market data to identify growth trends in enterprises and market sectors, how technology supports this and the impact on human resources
<b>B</b> Examine the ways in which business growth can be measured	<b>B1</b> Financial growth measures <b>B2</b> Non-financial growth measures	
<b>C</b> Investigate the reasons why some enterprises might fail	<b>C1</b> Internal factors <b>C2</b> External factors	A presentation based on a situational analysis that looks at internal and external factors, growth and exit strategies
<b>D</b> Explore the growth and exit strategies which could be considered by the owners of an enterprise	<b>D1</b> Growth strategies <b>D2</b> Planning for an exit strategy	

### Assessment guidance

This unit is internally assessed through a number of independent tasks. Each task should cover at least one entire learning aim and it is essential that a learning aim is assessed as a whole and not split into tasks or sub-tasks per criterion.

There is a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

- Learning aims: A and B (A.P1, A.P2, B.P3, B.P4, A.M1, B.M2, A.D1, B.D2)
- Learning aims: C and D (C.P5, C.P6, D.P7, D.P8, C.M3, D.M4, D.M5, C.D3, D.D4)

All learners must independently generate individual evidence that can be authenticated.

The main sources of evidence are likely to be written reports, or articles for a journal.

Learners should incorporate in-depth research that is corroborated by a fully referenced bibliography.

Learners could also produce presentations. Suitable forms of evidence for a presentation include slides, preparation notes, script, cue cards, peer assessment records and an observation record. BTEC assessors can complete observation records and learners' colleagues in placements or part-time work can complete witness statements.

Observation records alone are not sufficient sources of learner evidence; the original learner-generated evidence must also support them. Assessors should remember that they are assessing the content of the presentation against the learning aim and not the skill with which the presentation was delivered.



## Getting started

This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.

### Unit 5: Survival and Growth

#### Introduction

Begin by introducing the unit to learners through a group discussion exploring enterprises they know. Ask learners to think of examples of enterprises that they are aware of that are particularly successful, or have failed, drawing on their research and discussions in previous units. You can follow this by outlining the learning aims of the unit.

#### Learning aim A – Explore the factors which influence the survival of an enterprise

Begin by explaining the factors that influence the survival of an enterprise. Introduce the concepts of how the stages of the product lifecycle may impact on resource management, and the role and influence of technology.

- Ask learners to research a variety of small and large enterprises, either ones they have discussed already in the previous units or new enterprises, and then contribute to a class discussion about what makes the enterprises successful. The discussion should consider why some enterprises have succeeded where others have failed.
- Lead a discussion on the resources of successful enterprises in the area, i.e.
  - physical and human
  - technological, e.g. their use of the internet, social media and viral marketing.
- Ask learners to produce a spider diagram of enterprises that they think are the most successful. This could then be displayed for future reference. In small groups, learners should then list what they consider are the three key factors that have influenced the success of these enterprises. Learners should report these findings back to the class, with the result being a list of key factors that could be added to the spider diagram. As a class, learners should be encouraged to discuss their findings.
- Using the learners' examples from earlier, lead a discussion on different local and national enterprises. Ask learners to determine which they consider to be the most successful and why. Using relevant examples from this discussion, learners should explore the role of technology on enterprise operations and the positive and negative influence of technology.

#### Learning aim B – Examine the ways in which business growth can be measured

- Introduce the topic of measuring business growth. Explain the difference between financial and non-financial growth measures.
- Ask learners to work in small groups to research and gather further information on the ways in which business growth can be measured. This could be online research, or through visits to local entrepreneurs.
- Ask learners to prepare and deliver a presentation with professionally presented slides and speaker notes to give their findings on either financial or non-financial growth measures to the class.
- Use the learners' presentations to lead a discussion on the ways in which business growth can be measured.



- Lead the class in a discussion to ensure that learners understand the relative importance of different measures of business growth.
- Ask learners to use their research to draft a report that evaluates how the stages of the product lifecycle may impact on the resource requirements of an enterprise.
- Ask learners to prepare a presentation with professionally presented slides, using a range of growth indicators to show the relative performance of enterprises.

**Learning aim C – Investigate the reasons why some enterprises might fail**

- You could begin by looking at the internal and external factors that impact on enterprises and why enterprises fail.
- Ask learners to work in small groups to research and become 'experts' on the internal and external factors that impact on enterprises. These factors could include lack of planning or unrealistic and over-ambitious business plans, poor management, competitive market pressures, changes in consumer tastes and preferences and so on. Groups can either conduct research on each of these or they could be provided with appropriate case studies featuring examples of these factors.
- New groups can then be formed containing an 'expert' from each of the earlier groups. Encourage learners to share their knowledge with their peers, perhaps by creating shared lists or case studies that can be used for revision or reference throughout the other units.
- You should encourage your learners to independently research an enterprise of their choice to find out about the factors that impact upon it that might cause it to fail. Ensure that there is a broad range of enterprises covered in the group.

**Learning aim D – Explore the growth and exit strategies which could be considered by the owners of an enterprise**

- Explain growth strategies, and the finance options within growth strategies.
- Ask learners to demonstrate their understanding using a visual representation, for example, in the form of a spider diagram.
- You could invite learners to discuss in small groups what they think risk to an enterprise may be. They can then share their findings with the class.
- Explain how to carry out a situational analysis using a tool such as the Ansoff Matrix to show the impact of changing market conditions in different markets on the level of risk of business failure and give learners a case study to carry out their own situational analysis on. Ask learners to do this individually but share their results with the group afterwards.
- Ask learners to gather enough information to prepare a presentation that considers the risk of failure for an enterprise.
- Explain how enterprises plan for exit through exit strategies, looking at reasons for exit, possible exit routes and possible successors and different buyers.
- Lead a whole group discussion on the relationship between potential ideas and consideration of risk and opportunity.
- Ask learners to prepare and deliver a brief presentation on exit strategies to the group, following up with a question and answer session.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

- Unit 1: Enterprise and Entrepreneurs

### Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Enterprise and Entrepreneurship. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

### Journals

*Business Review* (Philip Allan Magazines) – a journal designed for Business Studies learners that includes relevant theoretical articles, as well as information on companies and markets

*The Economist* – The Economist print edition is a weekly economics and business journal that has regular articles and features about issues related to public sector businesses and the economy. It has an extensive archive of relevant materials.

### Videos

TED-Ed offers a variety of relevant education videos (<http://ed.ted.com>).

TED offers online videos of short, powerful talks (18 minutes or less) covering almost all topics ([www.ted.com](http://www.ted.com)).

### Podcasts

[www.eofire.com](http://www.eofire.com) – Entrepreneurs on Fire

<http://helpmybusiness.com> – Help My Business is a site that helps entrepreneurs and small business owners to build their business.

[www.thebusinesspodcast.co.uk](http://www.thebusinesspodcast.co.uk) – The Business Podcast is a weekly podcast to all tutors and learners on current business topics using contemporary, relevant online newspaper articles. Subscription is free.

<http://theintrovertentrepreneur.com> – The Introvert Entrepreneur is a company that provides services for introverts and those who live/work/play with them.

### Worksheets

<http://entrepreneurship.org/~media/77EB3D61F8584F6CB5EFD1AE8DEE8855.ashx> – Worksheet on growth indicators

### Websites

[www.bbc.co.uk/news/business/economy](http://www.bbc.co.uk/news/business/economy) – The BBC provides news on the UK economy.

[www.businesscasestudies.co.uk](http://www.businesscasestudies.co.uk) – The Times 100 has economics and business case studies to include how Portakabin uses Ansoff's Matrix. The site also has a selection of theory notes aimed at learners such strategy theory on business failure.

[www.economist.com](http://www.economist.com) – The Economist online has an archive of articles about the UK economy. A subscription is required but it also includes the weekly editions of the newspaper.



[www.enterprise.ac.uk/index.php/case-studies](http://www.enterprise.ac.uk/index.php/case-studies) – Enterprise Educators UK is the national network for enterprise educators.

[www.entrepreneur.com](http://www.entrepreneur.com) – Entrepreneur magazine online has articles such as *Lessons from Successful Entrepreneurs on How to Beat the Competition*. Also available as an app on iTunes

<https://itunes.apple.com/us/app/entrepreneurmagazine/id466584564?mt=8>

[www.fpb.org/business-support/15-reasons-why-businesses-fail-and-how-succeed](http://www.fpb.org/business-support/15-reasons-why-businesses-fail-and-how-succeed) – An article on success and failure from the Forum of Private Businesses

[www.mindtools.com/CommSkill/WritingSkills.htm](http://www.mindtools.com/CommSkill/WritingSkills.htm) – Tips on how to develop good communication skills

[www.pjea.org.uk](http://www.pjea.org.uk) – Information on The Peter Jones Academy with links to case studies and examples

[www.slideshare.net](http://www.slideshare.net) – SlideShare has a number of resources to include coverage of competitive market pressures.

[www.smallbusiness.co.uk](http://www.smallbusiness.co.uk) – Website with news and articles for small businesses

[www.speakers4schools.org](http://www.speakers4schools.org) – Speakers for Schools is a UK charity that provides state secondary schools and colleges with talks from a range of industry leading professionals, public figures and academics, free of charge.

[www.tes.com](http://www.tes.com) – TES online has a variety of free teaching resources.

[www.tutor2U.com](http://www.tutor2U.com) – This site provides study notes on topics such as Ansoff's Matrix. There are also links to other sources of information.

*Pearson is not responsible for the content of any external internet sites. It is essential for tutors to preview each website before using it in class so as to ensure that the URL is still accurate, relevant and appropriate. We suggest that tutors bookmark useful websites and consider enabling learners to access them through the school/college intranet.*



## Unit 6: Business Decision Making

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### Delivery guidance

#### Approaching the unit

This is a practical unit, which will allow your learners to understand the importance of planning and decision making in running a successful business. As this is a synoptic unit, the focus should be on consolidating the understanding and skills developed in previous units. Learners will then be able to make rational decisions based on information given relating to complex business problems.

The rationale behind this unit is to enable learners to 'think on their feet' which will benefit them when faced with real-life business decisions or in interview situations when learners are expected to demonstrate their ability to find solutions to given scenarios in a relatively short space of time.

You can use a range of delivery methods in this unit, such as:

- discussions, e.g. class and small group discussions on business ideas
- individual or group presentations, e.g. covering data analysis
- case studies illustrating competitor analysis.

Group work is an acceptable form of delivery, but you must ensure that each learner produces sufficient evidence on their own for assessment.

You can involve local employers in the delivery of this unit by inviting them as:

- guest speakers
- members of audience for learner presentations where they can give feedback
- providers of work experience for learners, and of business materials as exemplars
- mentors for learners.

#### Delivering the topics

Introduce the unit and topic A on business plans by discussing learners' understanding of a 'start-up business' and a 'developing business'. Learners could give examples of businesses they know. What factors could affect a business just starting out, for example the current trends in the economic market? Why might an established business decide to change direction or diversify? One reason could be more competitors entering the market.



All successful businesses have an operational plan. They have clear aims and objectives and an organisational structure. The size and nature of the business will affect its location. Learners need to understand that the product or service being offered will also have an effect on the location: for example, a business may be relatively small but operate on an international basis through their website. Inviting local entrepreneurs to talk about their experiences would give learners a real insight into the challenges faced by entrepreneurs in today's constantly changing market.

Topic B, on decision making in business, is all about using a number of different methods to aid decision making. Learners need to understand the importance of carrying out thorough research before either starting up a new business or developing an existing business. Using business models can also be a useful technique when deciding on an appropriate course of action.

Learners need to be able to analyse the information available in an appropriate format and demonstrate that they are able to use a number of different techniques to analyse data. Potential investors will want to see that the entrepreneur has used all the tools available, such as the use of investment appraisal methods to justify the viability of the new or developing business.

In topic C on using research to justify marketing, learners will further develop and utilise the knowledge and understanding developed in *Unit 2: Developing a Marketing Campaign*. They will look at types of research and establish how they could use effective research in the process of reaching an informed decision regarding a new business start-up or business development.

Learners will carry out competitor analysis for a particular market and will be required to explain the effects competitors can have on the business and its success. They will look at the effect changes in trends can have on the business.

Learners will draw on their understanding of the elements needed to create a marketing plan and will need to demonstrate their ability to develop a marketing plan for a specific target market.

All businesses are affected by legislation, whether it is consumer legislation or employment legislation. Industry-specific legislation will also have a major influence on the way in which a business can operate. For topic D, efficient operational management of the business, learners will need to understand the consequences of a business not complying with legislation, for example the result of not meeting the requirements of consumer protection legislation could be a poor reputation and loss of customers. You could ask your learners to give some other examples.

It would be helpful to discuss with your learners why they think it is so important for a business to ensure the quality of the product or service. Learners could also demonstrate, through discussion, their knowledge of different methods used by businesses to ensure quality. Learners also need to understand why some methods would not be appropriate for a small business, for example, total quality management (TQM).

For topic E, learners will need to understand the importance of managing resources. The level of resources required will depend on the size and structure of the business. For example, a small start-up business will often not need human resources other than the owner. However, a developing business may need to think





about increasing its staffing levels. You could discuss with your learners their experiences of the recruitment process as many of them will have part-time jobs so will have direct experience. Learners will need to think about training and the cost of training. A small business may not have the funds to pay for external training so will have to tailor their training needs to suit the finance available.

The cost of buying physical resources will often be prohibitive, so a new start-up business may have to think about the minimum number of resources that it could operate with. Do they buy or rent premises? How could the business obtain major equipment or vehicles without paying upfront? Discuss with learners how finding the right suppliers could benefit the business.

The funds available to a start-up or a developing business will often be limited. Discuss with learners where the funds could come from. Learners will need to identify the difference between start-up costs and running costs. They will need to give examples.

In *Unit 3: Personal and Business Finance*, learners will have gained knowledge and understanding of business finance. In topic F, they will be required to put this to practical use in the creation and interpretation of financial forecasts. You will need to remind learners how to create and analyse a variety of financial documents such as cash flow forecasts, break-even charts, income statements and statements of financial position. Learners could be given examples and be asked to discuss the implications of the figures for the business.

For topic G, by analysing performance, liquidity and profitability ratio calculations, it is possible to gain a clear picture of the viability of a business. Your learners should be able to calculate a wide range of ratios from given data and should be given the opportunity to practise these in different scenarios.

SWOT and PESTLE analysis are also good methods of determining the viability of a business. Learners should have a clear understanding of both and be able to give solutions to a variety of threats and 'what if' scenarios and create a contingency plan.

Topic H, on demonstrating business skills/IT skills, focuses on the personal business skills that your learners should have developed over the course. Learners may benefit from visits from local entrepreneurs to discuss the skills they use in the running of their businesses. Learners could also be given case studies where they have to identify key factors and offer solutions to problems.

You will need access to computers/laptops and appropriate software for learners to be able to create reports, presentations etc. Learners will need to be shown how to set out formal business reports and executive summaries so they understand all the key elements that should be included. Although most learners will have had access to IT hardware and software throughout their educational career, it should not be assumed that all learners will have the skills and knowledge to create presentations and manipulate data to generate graphs etc. and therefore some time should be spent on these aspects.



## **Assessment guidance**

This unit is externally assessed and the assessment should be completed by your learners under examination conditions. Learners will have three hours to complete the assessment, which includes reading and planning time. Your learners will be given a set task based on an unseen case study/business scenario, together with additional supporting documents. Your learners will be expected to analyse the information given and produce a formal business plan. The business plan should include the aims and objectives of the plan, type of business, ownership, premises, legal implications, staffing, equipment required, target market and sources of finance.

For the second set task, learners will be required to produce a presentation, with speaker notes, summarising the viability of the business proposition. The purpose of the presentation will be to encourage potential investors to put money into the business.

The more practice learners have at producing business plans and presentations, the better prepared they will be for this time-controlled assessment. Once all the teaching and learning has been completed, it would be useful to set learners a series of timed mock assessments, using the Sample Assessment Material (SAM) and the centre's own test scenarios.



## Getting started

**This gives you a starting place for one way of delivering the unit. Activities are suggested in preparation for the external assessment.**

<b>Unit 6: Business Decision Making</b>
<p><b>Introduction</b></p> <p>Business planning and decision making are key skills needed by an entrepreneur to set up a new business or develop an existing business. Without these skills the enterprise is likely to fail. The aim of this unit is to allow learners to develop these skills to enable them to make rational decisions based on the scenario given in the timed assessment.</p>
<b>Topic A – Business plans</b>
<p>You could begin by having a group discussion to establish learners' understanding of start-up businesses and developing businesses and the factors that may influence an entrepreneur to start a new business or develop an existing one.</p> <ul style="list-style-type: none"> <li>• Learners could work in small groups to identify a list of start-up businesses in the local area. They could discuss whether the businesses are filling a gap in the market, what the current trends and demand are for the product/service, and who the competitors are. Learners could also consider the reasons why the businesses may or may not succeed.</li> <li>• Once established, businesses may need to change direction and develop in order to survive. Learners will need to consider the factors that may influence a business to diversify.</li> <li>• As this is a synoptic unit, learners will have already considered aims and objectives, business ownership and business structure in other units, but these topics should be developed here to include more detail. You will need to ensure that learners fully understand these aspects and their significance when starting up a new business or developing an existing one, and learners should also be able to explain the justification for different products, services, structures, locations, and types of ownership. Writing tasks based on carefully selected case studies are a good way of achieving this.</li> <li>• Enlist the help of local business people to come in to speak to learners about their experiences – how they started up and developed their business, how it is structured, and its aims and objectives.</li> </ul>
<b>Topic B – Decision making in business</b>
<p>To ensure making a correct decision, businesses have to have the right information. This is why one of the first steps in starting up a business is to carry out thorough research. Learners should be aware of different research methods from studying other units such as <i>Unit 2: Developing a Marketing Campaign</i>. They need to be able to use the data collected for the purposes of analysis, comparison and evaluation.</p> <ul style="list-style-type: none"> <li>• In groups, learners could be given a specific market to research and prepare a short presentation for the rest of the group outlining the viability of setting up a new</li> </ul>



business within that market. Learners should use their market research to justify their decision and explain and justify the different sources of data they have used as a basis for their recommendations.

- Learners will require tutor input so that they have an understanding of how business models, such as Porter's five forces model, could be used to aid decision making. You could give your learners case studies that require analysis, covering all relevant business models. Learners could then select the business model for each study that they feel is going to be most appropriate to aid their decision-making process and use the business model to justify their decision.
- Learners will require tutor input so that they have a clear understanding of how to calculate mean, median and mode, together with measures of dispersion, use of quartiles, percentiles, and correlation coefficient. This may be difficult for some learners and therefore they may require a great deal of practice in order to carry out calculations from raw data confidently and be able to use their results to draw conclusions.
- Learners will need to know how to interpret graphs and create graphs using spreadsheets. Again, individual practice will be helpful to ensure that learners are able to confidently create graphs and analyse data presented in the form of graphs. Learners should also develop an understanding of the role these graphs play in business contexts and the ways in which they can be used to put forward a business case. Asking learners to prepare and present a report that involves the use of graphs is a good way to achieve this.
- Learners need to be familiar with the main management information systems that businesses use, including computer-based information processing tools for operating, tactical and strategic levels of the business. Introducing them to examples of software and asking them to practise this is a good way to achieve this.
- Learners will require tutor input so that they understand the use of project management tools such as Gantt charts, networking and critical path analysis. Learners could individually practise creating such charts.
- Learners will also require tutor input to understand the financial tools used for investment appraisal, such as net present value, discounted cash flow and internal rates of return. You will need to make a number of case studies available for learners to ensure that they are able to carry out the calculations required for different investment appraisal methods with confidence.

### **Topic C – Use of research to justify the marketing of a business**

As part of the business plan, learners will need to consider how they would market the product or service identified in the scenario given in the external assessment and how they would use research to justify a marketing plan.

- You could lead a discussion to establish learners' knowledge and understanding of different types of research, both primary and secondary. Learners should have covered this topic in *Unit 2: Developing a Marketing Campaign*. Learners could produce a chart outlining the advantages and disadvantages of a range of research methods.
- Learners could be given a research task to look at the competitors of a specific business and use the information to analyse the effect the competitors have on the



business in terms of the product/service offered, pricing strategies and location. Learners could then present their findings to the rest of the group.

- Learners will require tutor input to develop their understanding of how trends can affect the way in which a marketing plan is tailored for a particular product/service. Trends should include economic, market and social trends.
- You could discuss with learners the elements of a marketing plan (the 7Ps). Learners should be able to draw on the knowledge and understanding gained in the delivery of *Unit 2: Developing a Marketing Campaign*, so this should partly be revision. This should be extended to include a discussion of how these elements can be applied in different target markets.

### Topic D – Efficient operational management of the business

Legislation can have a great impact on the way in which a business operates; in particular, industry-specific legislation. Additionally the need to have quality products/services that will attract and retain customers will affect the way in which a business operates. This topic considers both these areas.

- Learners will need tutor input regarding the main areas of legislation that will affect most businesses (e.g. employment legislation). Learners will also need to understand that some industries need to follow industry-specific legislation: for example, a restaurant will need to consider appropriate food legislation.
- Learners could work in small groups and research different types of legislation. They could then produce a presentation outlining the relevant points and feed these back to the rest of the group.
- Learners will require tutor input regarding methods of ensuring quality. Learners need to fully understand that not all methods are suitable for all types of business, for example, TQM would not be appropriate for a mobile hairdresser.
- Learners could work in small groups to research different methods and present their findings to the rest of the group. Each group could produce handouts for the whole group.

### Topic E – Understand the importance of managing resources

The resources required for a business will be an important consideration in business planning. Resources can be categorised into three main areas: human resources, physical resources and financial resources. Learners will need to consider how each area is managed.

- Learners will require tutor input regarding the recruitment process and staffing in general. Learners need to understand that most businesses operate with the minimum possible number of staff without compromising efficiency, and that very small businesses will have very few staff. Learners could discuss, in pairs, their own experiences of the recruitment process and employment.
- Learners will require tutor input regarding training and cost of training and will need to understand the differences between in-house and external training and the advantages and disadvantages of each type.
- In small groups, learners could investigate different types of training and the cost that might be appropriate for a given business. You could give each group a



different case study and ask groups to present their findings to the whole group.

- You could lead a discussion regarding the types of physical resources that would be required by a given business and how these resources may be financed. Discussion could include a definition of start-up and running costs.
- In small groups, learners could be given a case study and asked to research the type of resources that would be required to set up and run the business. Learners should also consider how these could be financed. Groups should present their findings.

### **Topic F – Creation and interpretation of financial forecasts**

Potential investors will want to see financial forecasts before considering investing in a business. Topic F covers the creation and interpretation of a range of financial forecasts. Learners will have had the opportunity to develop their ability to create and analyse such documents within *Unit 3: Personal and Business Finance* so this section is to allow learners to further develop their skills in this area.

- You could lead a discussion to establish the learners' level of existing knowledge and understanding of financial forecasting documents.
- Learners could be given a number of exercises to create a range of financial documents from data given, including a sales forecast, cash flow forecast, break-even chart, income statement and balance sheet. Learners could then analyse the results, make recommendations and justify these. Results could be discussed as a group.

### **Topic G – Viability of a business**

There are a number of different methods available to test the viability of a business. These include ratio analysis, SWOT analysis and PESTLE analysis. Learners will need to be able to use these methods to justify any decisions made regarding the business identified in the assessment scenario.

- Learners will have studied liquidity, performance and profitability ratios in *Unit 3: Personal and Business Finance*. You will need to establish the level of learner competency in calculating and analysing ratios from given data. This could be achieved by giving learners a number of exercises to complete, with a greater emphasis on interpretation of results than in *Unit 3: Personal and Business Finance*.
- Learners will require tutor input to understand the benefits of carrying out a SWOT and PESTLE analysis. Learners could work in small groups on a given case study and produce a SWOT and PESTLE analysis. These could be discussed with the whole group.
- Once learners have a clear understanding of both SWOT and PESTLE analysis, they should practise applying this as a tool to find solutions to a variety of threats and 'what if' scenarios (these should be given by the tutor in the form of appropriate case studies/scenarios). Learners should also be given the opportunity to practise 'what if' scenarios using appropriate IT software.
- Learners will require tutor input on the subject of contingency planning. This topic will have been addressed in *Unit 4: Managing an Event*, so you will need to ensure that learners have understood the concept and not confused contingency planning with risk assessment as is often the case. Creating their own contingency plan as an extension to the previous activity is a good way of ensuring learners' understanding.



### **Topic H – Demonstrate business skills/IT skills**

This is a practical topic and learners should be given the opportunity to demonstrate these skills at various points in this unit. Giving learners the opportunity to produce a business report and executive summary and present their results will ensure this requirement is covered. Learners should also be introduced to appropriate programmes and software for the production and manipulation of financial information, generation of graphs and 'what if' scenarios. It is best to cover these topics as part of your coverage of topics B and G.

Learners should also be given the opportunity to demonstrate these skills through completing mock assessments, using the SAM and your centre's own assessment tasks. Learners will require tutor feedback on their performance.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

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Pearson BTEC Level 3 Nationals in Business (NQF):

- All other units, as it is synoptic to the qualification.

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Business. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

## Textbooks

- Kourdi J – *Business Strategy: A Guide to Effective Decision-Making* (Economist Books, 2015) ISBN.9781610394765.  
This guide looks at the process of strategic decision making – from vision, forecasting and resource allocation, through to implementation and innovation.

## Journals

- *Businessweek* (Bloomberg Business)  
This delivers business and market news which is useful to help keep up-to-date with market trends.
- *The Economist* (The Economist Group)  
This offers insight and opinion on a range of business related topics.

## Websites

- [www.businesscasestudies.co.uk](http://www.businesscasestudies.co.uk)  
This site contains free materials and case studies.
- [www.ted.com/talks](http://www.ted.com/talks)  
This site contains short video clips of talks given by entrepreneurs.
- [www.videoarts.com](http://www.videoarts.com)  
This site contains training videos on a variety of topics.





- [www.speakers4schools.org](http://www.speakers4schools.org)  
A useful source for finding available speakers in your area.
- [www.schoolspeakers.co.uk](http://www.schoolspeakers.co.uk)  
A useful source for finding speakers on a range of topics.



## Unit 7: Social Enterprise

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### Delivery guidance

#### Approaching the unit

As this is an introduction to social enterprise, no previous knowledge is assumed.

Learners should be encouraged to research and learn about social enterprise and social entrepreneurs. They should carry out in-depth investigations into a range of social enterprises and explore the factors that contribute to the success or failure of social enterprises. Learners should also plan, participate in and review a short social enterprise activity.

Learners might not think that they know anything about social enterprise – but they have probably bought a copy of the Big Issue, shopped at the Co-op, donated through JustGiving and heard about the Eden Project and Jamie Oliver's Fifteen, which are all examples of successful social enterprise.

To complete this unit, learners will need to access a range of research materials, which could include the internet, journals or magazines and books.

You can use a range of delivery methods in this unit, for example:

- Discussions – class and small group discussions on social enterprise
- Individual or group presentations
- Case studies illustrating enterprise for both well-known and lesser-known entrepreneurs
- Video – providing talks on enterprise and entrepreneurs.

Group work is an acceptable form of delivery, but you must ensure that learners individually produce evidence that is sufficient for assessment.

#### Delivering the learning aims

##### Learning aim A

For learning aim A (investigate a range of social enterprises), the topic can be introduced through using well-known examples of social enterprises, such as the Co-operative, JustGiving, the Eden Project, the Big Issue and Fifteen. Explain to learners the operation of social enterprises, including the type, framework and structures, and the difference between social enterprise and corporate social responsibility. Set tasks where learners research a variety of small and large businesses that they think are social enterprises, then have learners individually present one business to the class, for a class discussion on its operation that can lead on to a wider discussion.

Guest speaker input will greatly benefit the delivery of this learning aim, and speakers from social enterprises can enhance learners' understanding. You may be able to arrange for someone from a social enterprise to speak to learners, or try [www.speakers4schools.org](http://www.speakers4schools.org), a UK charity providing state schools with inspiring talks from leading figures, free of charge.

**Learning aim B**

For learning aim B (explore the factors that contribute to the success or failure of social enterprises), introduce learners to case studies showing social enterprises that have succeeded and those that have failed, and explain the reasons for this. Ask learners to prepare and deliver presentations with professionally presented slides and speaker notes on their choice of successful and failed social enterprises, and use these to evaluate their understanding.

You could invite guest speakers from social enterprises to talk about the reasons for success. To ensure that learners are getting the most out of this activity, they should be encouraged to prepare appropriate questions in advance prior to the speaker's arrival on the subject of success and failure factors and why they have been successful (or not).

**Learning aim C**

For learning aim C (plan, participate in and review a short social enterprise activity), you can begin by looking at the opportunities for learners to set up a social enterprise. Small groups can start by planning a social enterprise that they could run, for example, providing a local car-washing service, offering recycling opportunities, running a tuck shop, running a fitness class or hosting a sporting activity. Ensure that learners understand the importance of the viability of their short-term social enterprise before undertaking it. Learners will be required to evaluate the effectiveness of their social enterprise activity and reflect on their own contribution. Reflecting on effectiveness is a skilled task, and therefore, you need to ensure learners are able to identify the key areas to review and understand how they could assess the impact of their own contribution to the social enterprise activity.



### Assessment model

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Investigate a range of social enterprises	<b>A1</b> Principles and values of social enterprises <b>A2</b> Operation of social enterprises <b>A3</b> Social enterprise versus corporate social responsibility	A report based on learners' research that examines a chosen social enterprise, and the factors that have determined its success or failure
<b>B</b> Explore the factors that contribute to the success or failure of social enterprises	<b>B1</b> Factors contributing to success <b>B2</b> Factors contributing to failure	
<b>C</b> Plan, participate in and review a short social enterprise activity	<b>C1</b> Planning and running a social enterprise activity <b>C2</b> Reviewing a social enterprise activity	Active contribution to the planning and running of a one-off short social enterprise activity, accompanied by observation records and other supporting evidence, as well as a review of its outcome

### Assessment guidance

This unit is internally assessed through a number of independent tasks. There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aims: A and B (A.P1, A.P2, B.P3, B.P4, A.M1, B.M2, A.D1, B.D2)

Learning aim: C (C.P5, C.P6, C.P7, C.M3, C.M4, C.D3)

All learners must independently generate individual evidence that can be authenticated.

The main sources of evidence are likely to be written reports, or articles for a journal.

Learners should incorporate in-depth research that is corroborated by a fully referenced bibliography.

Learners could also produce presentations. Suitable forms of evidence for a presentation include slides, preparation notes, script, cue cards, peer assessment records and an observation record. BTEC assessors can complete observation records and learners' colleagues in placements or part-time work could complete witness statements.

Observation records alone are not sufficient sources of learner evidence; the original learner-generated evidence must also support them. Assessors should remember that they are assessing the content of the presentation against the learning aim and not the skill with which the presentation was delivered.



## Getting started

**This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.**

### Unit 7: Social Enterprise

#### Introduction

Begin by introducing the unit to learners through a group discussion exploring social enterprises they are familiar with. You can follow this by outlining the learning aims of the unit. Ask learners to consider how a social enterprise is different from the types of enterprise discussed in Unit 1, and refer back to definitions of what enterprise is and how a social enterprise can be defined.

#### Learning aim A – Investigate a range of social enterprises

- Lead a discussion on the question 'what is social enterprise?'. Give learners examples such as the Co-operative, JustGiving, the Eden Project, the Big Issue and Fifteen.
- Ask learners to individually jot down what they think are the key principles and values of each social enterprise you have discussed and report back to the class, with the result being a combined list of social enterprises with their principles and values.
- Discuss the operation of social enterprises and include examples of the type, framework and structures of different social enterprises.
- Ask learners to research a variety of small and large businesses that they think are social enterprises, and then contribute to a class discussion on their operation.
- Using the learners' examples, lead a discussion on social enterprise versus corporate social responsibility. Ask learners to consider what is similar and what is different.
- Discuss the current use of the term 'social enterprise'. Is it being misused in some instances? For example, Innocent Drinks sells itself as being a social enterprise, but it sold out to drinks giant Coca-Cola in 2009. Is John Lewis, which takes in the Waitrose supermarket chain, a social enterprise, given its partnership structure and staff profit sharing?
- Ask learners to consider the qualities and skills of a 'social entrepreneur' versus an entrepreneur as defined in Unit 1. These qualities could be recorded on a shared area and used for revision during the unit.
- Ask learners to investigate different types of enterprise and to then prepare and present their findings to their peers. If group numbers allow, give each learner a specific type of social enterprise to investigate and ask them to share their findings with those that have investigated a different type.
- Split the learners into three even groups. Each group is to consist of one person from each group and they are going to create a marketplace. One person will be the representative for the Industrial and Provident Societies (IPS). The second person will be the representative for the Community Interest Company (CIC). The third person will be the representative for the Limited Liability Company (LLC). Each learner will become an 'expert' on the structures of these individual enterprises and share their knowledge, on request, with the wider group.
- Enlist the help of a local entrepreneur to give a talk to the students on corporate social responsibility and what it means to their business.

#### Learning aim B – Explore the factors that contribute to the success or failure of social enterprises



- Give learners case studies that show enterprises that have succeeded and those that have failed. Ask learners to think about the reasons for their success or failure and share their findings with the class.
- Ask learners to independently research and gather information on the factors that contribute to the success and failure of a social enterprise. This could be online research or through visits. Learners should then present their findings to the group.
- Ask learners to work in small groups to independently research and gather information on the factors that contribute to the success and failure of a social enterprise of their choice. This could be through online research or through visits to local social enterprises if possible.
- Ask learners to prepare and deliver a presentation with professionally presented slides and speaker notes on one successful and one failed social enterprise to the class. To ensure all the factors in the learning aim are covered, allocate an example of a social enterprise that relates to each one to groups of learners.
- Use the learners' presentations to lead a discussion to confirm their understanding of the factors that contribute to the success or failure of social enterprises.
- Split the learners into two even groups. One person from each group should investigate one of the factors that contribute to the success of social enterprise, and one of the four will investigate what contributes to the failure of social enterprises. Each person will research sufficiently to lead a debate on why their factor is the most important one. The remaining learners could vote on who is the winner at the end of the debates.
- Enlist the help of local social entrepreneurs to enhance your learners' experience.
- Invite them in to talk about their enterprise and the factors for success and failure they have encountered and how they overcame any problems.

### **Learning aim C – Plan, participate in and review a short social enterprise activity**

- You could begin by looking at the opportunities to set up as a social enterprise locally and nationwide.
- Split the class into groups no larger than four. Give each group a list of suggestions and ask them to plan an enterprise that they could run, e.g.:
  - Improving your local community, e.g. provide a gardening service
  - Improving the environment, e.g. collection of waste, recycling activities
  - Providing a service for your centre, e.g. running a tuck shop/fitness class/sporting activity.
- Ask the learners to share their plans with the rest of the group, and lead a discussion on the viability of starting one of these plans as a short-term social enterprise with a view to the learners undertaking this.
- Enlist the help of a local entrepreneur to give a talk to the students on social accounting and auditing.
- When reviewing a social enterprise activity, learners can keep an ongoing diary recording and measuring the outcomes in the following areas: meeting planned social and commercial objectives, meeting stakeholder needs, achievement of success factors, reflecting on own contribution, what could have been improved and lessons learned.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

- Unit 1: Enterprise and Entrepreneurs

### Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Enterprise and Entrepreneurship. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

### Textbooks

Ashton R, *How to be a Social Entrepreneur: Make Money and Change the World*, Capstone, 2010 ISBN 9780857080608

Bornstein D, *Social Entrepreneurship: What Everyone Needs To Know*, Oxford University Press, 2010 ISBN 9780195396331

Mycoskie B, *Start Something That Matters*, Virgin Books, 2012 ISBN 9780753540244

### Journals

*Business Review* (Philip Allan Magazines) – A journal designed for Business Studies students that include relevant theoretical articles, as well as information on companies and markets

*The Economist* – The Economist print edition is a weekly economics and business journal that has regular articles and features about issues related to public sector businesses and the economy. It has an extensive archive of relevant materials.

### Videos

TED-Ed offers a variety of relevant education videos (<http://ed.ted.com>).

TED offers online videos of short, powerful talks (18 minutes or less) covering almost all topics ([www.ted.com](http://www.ted.com))

This YouTube link gives business ideas and trends from Entrepreneur Magazine and Entrepreneur Network partners. The site offers the latest news, expert advice and growth strategies for small business owners ([www.youtube.com/user/EntrepreneurOnline](http://www.youtube.com/user/EntrepreneurOnline)).

### Podcasts

[www.thebusinesspodcast.co.uk](http://www.thebusinesspodcast.co.uk) – The Business Podcast is a weekly podcast to all tutors and pupils on current business topics using contemporary, relevant on-line newspaper articles. Subscription is free.

### Websites

[www.clearlyso.com/what-is-a-social-enterprise-2](http://www.clearlyso.com/what-is-a-social-enterprise-2) – Webpages defining social enterprise

[www.entrepreneur.com](http://www.entrepreneur.com) – Entrepreneur magazine online. Also available as an app in iTunes (<https://itunes.apple.com/us/app/entrepreneur-magazine/id466584564?mt=8>)

[www.enterprise.ac.uk/index.php/case-studies](http://www.enterprise.ac.uk/index.php/case-studies) – Enterprise Educators UK is the national network for enterprise educators. Members post case studies that demonstrate the impact of their enterprise and entrepreneurship education.



<http://entrepreneurhandbook.co.uk/search/social+enterprise> – Articles on social enterprise to include a case study on Ben and Jerry's

[www.gov.uk/set-up-a-social-enterprise](http://www.gov.uk/set-up-a-social-enterprise) – Government portal for government departments and policies

[www.senscot.net/view\\_res.php?viewid=4456](http://www.senscot.net/view_res.php?viewid=4456) – The stories of 20 great UK social entrepreneurs

[www.socialenterprise.org.uk](http://www.socialenterprise.org.uk) – Website for the national body for social enterprise

[www.socialenterprisemark.org.uk](http://www.socialenterprisemark.org.uk) – Website for the Social Enterprise mark, awarded when a business or organisation puts profits towards social or environmental good

[www.speakers4schools.org](http://www.speakers4schools.org) – Speakers for Schools is a UK charity that provides talks to comprehensives, academies, free schools, grammar schools and further education colleges from a range of industry-leading professionals, public figures and academics, free of charge.

[www.the-sse.org](http://www.the-sse.org) – Website of the school for social entrepreneurs

<http://ed.ted.com> – TED-Ed has a growing library of lessons and educational videos.

[www.tes.com](http://www.tes.com) – TES online has a variety of free teaching resources.

[www.tutor2U.com](http://www.tutor2U.com) – This site provides resources and revision materials. There are also links to other sources of information.

<https://unltd.org.uk> – Provider of support to social entrepreneurs in the UK and offers the largest such network in the world

[www.young-enterprise.org.uk/](http://www.young-enterprise.org.uk/) – UK charity that aims to empower young people to harness their personal and business

*Pearson is not responsible for the content of any external internet sites. It is essential for tutors to preview each website before using it in class so as to ensure that the URL is still accurate, relevant and appropriate. We suggest that tutors bookmark useful websites and consider enabling learners to access them through the school/college intranet.*





## Unit 8: Entrepreneurship and Intrapreneurship in Practice

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### Delivery guidance

#### Approaching the unit

Bringing new and unique products and services to the market requires people who have a clear understanding of the target market, coupled with the drive and ambition to take calculated risks in order to secure financial gains. It may be that your learners have a business idea of their own that they wish to pursue and develop in order to follow their dream of becoming a successful business entrepreneur.

In this unit, you can give learners more opportunities to explore the characteristics of successful entrepreneurs, building on the work they began in Unit 1. Learners will also investigate the strategies employed by enterprises to develop and use entrepreneurial skills in their own workforce. In exploring this aspect in more depth, your learners will research the benefits to these businesses and their employees of working in an intrapreneurial culture.

This unit will help learners to gain a more in-depth understanding of what is required to be a successful entrepreneur and intrapreneur, and this will help learners when making career choices. This understanding will also support learners throughout all the units in this qualification and when undertaking more advanced or specialist business-related courses when progressing to higher education.

#### Delivering the learning aims

For learning aim A (explore the environment in which an entrepreneur operates), it will be useful for learners to understand the factors that influence market demand and supply in specific markets. A good starting point is to ask learners to think about their own purchasing habits in areas such as new technology and fashion and choose a specific item/service.

You can then introduce them to aspects such as product differentiation and the influence of innovation on product design and production. Provide some examples of innovative product design and differentiation and ask learners to come up with their own. Your learners may find it useful to undertake a PESTLE or SWOT analysis on some of these products. This should enable them to identify any common features that arise when conducting an environmental analysis. This will lead on to an introduction of the importance and influence of stakeholders in planning and decision making, along with the relative influence and importance of the various stakeholder groups on decisions taken by an entrepreneur.

The influence of stakeholders is becoming increasingly important and is closely linked with developments in information and communication technology that have fostered the development of social media. You can ask learners to provide examples of how businesses are using social media to promote their products, enhance brand image and counter negative social media trends, and discuss these as a group.

Learners should be compiling their research and using it to determine the entrepreneurial approach to innovation, as well as identifying good practice when dealing with potential business setbacks. Identifying business risks naturally follows on from this approach. Your learners can explore different case studies to identify the various classifications of business risks – both legal and reputational – and to evaluate the financial impact of these risks. For example, over the last decade, there have been



a number of instances of quality problems with car manufacturers (Toyota and VW) as well as questionable business financial practices relating to accounting irregularities (Tesco) and the level of executive bonuses (the banking industry).

Learning aim B (investigate how intrapreneurship can be developed and promoted within an enterprise) focuses on how the entrepreneurial mindset that learners covered in Unit 1, and the environment in which it is fostered, can be promoted in the workforce of an established business. It will be useful to start learning aim B by using the knowledge and insight of those learners who have experience of the world of work, i.e. those with part-time jobs.

Ask these learners to talk about the characteristics of their supervisor/line manager to the rest of the class. Classify these characteristics into leadership qualities and management roles and functions. It is likely that your learners' responses will focus on what their supervisors are like (their leadership style) and their technical skills (management roles). This is a good opportunity to highlight the difference between leadership and management. You can introduce the characteristics of different leadership styles and identify how the predominant leadership style in a business influences its structure. You can then ask your learners to identify their preferred leadership style from two perspectives – an employee and a manager – and follow this with an exercise to identify the characteristics within each leadership style that are incorporated into an entrepreneurial approach. (This is likely to exhibit characteristics from all of the main leadership styles.)

This could then be supported by the introduction of some theory. Learners could compare the characteristics they have identified with the categories identified by Mintzberg's Management Roles (Figurehead, Leader, Liaison, Monitor, Disseminator, Spokesperson, Entrepreneur, Disturbance Handler, Resource Allocator, Negotiator). A number of online resources are also available to enable learners to determine their own leadership style.

Discussion of the development of an intrapreneurial culture follows on from this. Learners could research best practice in developing such a culture by looking at different businesses and sharing their research findings with their peers. Teamworking will be a common feature of such businesses. Learners could research the link between culture, organisational structure and team structure. You could ask learners to identify the different types of organisational structure and focus on contemporary organisational designs and those that support entrepreneurship and intrapreneurship in practice.

Learning aim C (examine the ways in which an intrapreneur can contribute to the success of an enterprise) recognises that businesses seek to promote an intrapreneurial culture in order to use the expertise of their workforce to contribute towards improvements in the design of existing products, promote improvement in business systems, processes and practices, and contribute to the development of new products. Recommend a selection of businesses to learners for them to explore and identify where these elements are present, and to identify the benefits to the business in terms of different aspects of performance – financial, quality, staff motivation and customer service. This approach will provide an insight into how decisions are made within a business. Ensure that learners are made aware of the decision-making process and are able to map this process against specific leadership styles and employee engagement. In this way, learners will understand where different elements of the decision-making process sit along the autocratic–laissez-faire leadership continuum.

At the heart of the entrepreneurial mindset is the ability to make effective decisions that take into account the calculated risks that may arise when such decisions are implemented. Revisit learners' work on the entrepreneurial mindset from Unit 1 and ask learners to decide how this might differ from the personal attributes and qualities of a successful intrapreneur.



It will be useful to give your learners some examples of business decisions based upon different scenarios and option choices. For example, decisions relating to developing new markets, product design, pricing strategies and target markets. The learners can then be asked to share with other learners how they reached their decision and the knowledge and skills (and intuition) they used in doing so.

Finally, learners could explore the characteristics and qualities that businesses are seeking to promote, both within their current workforce and when seeking potential recruits. Increasingly, the term 'talent management' is taking over from the more conventional 'human resources' function (which itself replaced the traditional 'personnel' function) and this may give learners an insight into the personal profile of intrapreneurs required by businesses – problem solvers, persuaders, team players and the like.

Successful completion of this unit will have given your learners the opportunity to exhibit such qualities.



**Assessment model**

<b>Learning aim</b>	<b>Key content areas</b>	<b>Recommended assessment approach</b>
<b>A</b> Explore the environment in which an entrepreneur operates	<b>A1</b> Features of the environment <b>A2</b> Influence of stakeholders on planning and decision making <b>A3</b> Enterprise risks	A report analysing how best practice in developing an intrapreneurial culture could be implemented in a local enterprise. The best practice will be based on research conducted on an established enterprise that has a reputation for its intrapreneurial approach.
<b>B</b> Investigate how intrapreneurship can be developed and promoted within an enterprise	<b>B1</b> Different leadership and management styles <b>B2</b> Teams and organisational structures	
<b>C</b> Examine the ways in which an intrapreneur can contribute to the success of an enterprise	<b>C1</b> Monitoring and decision making <b>C2</b> Personal attributes and skills of a successful intrapreneur	

**Assessment guidance**

There is a maximum number of one summative assignment for this unit. The unit is internally assessed in line with the assessment rules and guidelines issued by Pearson. Your learners should be given the opportunity of engaging in activities and assignments that develop and support their knowledge of the role of the entrepreneur and intrapreneur as well as their generic skills.

Research activities should involve your learners using different source materials that require them to present their findings in a variety of formats such as reports, business articles and presentations. In their completed assignments, your learners should show evidence of data analysis and evaluation that are used to inform and justify any conclusions and recommendations included in the final submission.



## Getting started

This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.

### Unit 8: Entrepreneurship and Intrapreneurship in Practice

#### Introduction

Entrepreneurs operate in a high-pressure environment that requires them to exhibit a mix of technical knowledge and business skills, coupled with a diverse range of personal qualities and attributes. This unit looks at all of these aspects. It presents them in the context of new business ideas that can be developed via new business ventures or within established businesses that wish to promote and develop an intrapreneurial culture within their workforce. Involve your learners in activities that will allow them to review their own knowledge, skills and qualities that they can begin to match against those of an entrepreneur and intrapreneur.

#### Learning aim A – Explore the environment in which an entrepreneur operates

- You can begin by introducing the aims of the unit, an overview of the content of the learning aims and how your learners will be assessed. This will give a basis for the types of activities in which your learners will be engaged. You can also refer back to previous units studied that will help learners engage with the content in this unit.
- This learning aim considers three related areas – key influences within the market, the role of stakeholders and how an entrepreneur can identify, evaluate and manage business risks.
- It is important that you explain to learners the composition of the market in terms of the key determinants of demand and supply, and how each of these elements can have an impact on decisions made by an entrepreneur.
- In order to get them to begin to consider the elements of demand and supply, ask learners to identify how products they are familiar with are influenced by demand and supply. Organise a session in which they can carry out research to identify the current demand for mobile phones and collect data regarding the sales of the latest models introduced to the market. A similar exercise can be completed by another group of learners who could research market data for a different product, e.g. the market for electric cars.
- Learners should use the data they have collected on the two contrasting products to begin identifying the features of a market. You can then introduce the concepts of market size, market segmentation, market growth and the influence of buyers and producers. Learners can use the data they have collected to produce a market trend analysis. In doing this, they will begin to understand the notion of market saturation and its impact upon innovation and product differentiation – two key features of an entrepreneur's role. This should enable them to identify any common features that arise when conducting an environmental analysis. Learners could compile these in a list to refer to for revision purposes.
- Ask learners to prepare a SWOT and PESTLE analysis on the two products selected in the first activity. They can use this exercise as the starting point for developing a business strategy for each of the respective products. As a starting point, ask them to think how they would propose to build upon the strength of the product, its technical features and its brand image.
- In undertaking a PESTLE analysis, learners will be introduced to the notion of stakeholders. You should aim to identify the main stakeholder groups and their respective influence in different situations. You may be able to use specific local circumstances, e.g. learners can be asked to research the local press to find



examples of current local issues and concerns that are being raised by residents. National issues can also be investigated in areas such as energy supplies (fracking) and housing developments (impact on the local environment).

- Ensure that learners are able to explain why an entrepreneur needs to take account of the main stakeholder groups and, more importantly, how entrepreneurs might respond to the influence of specific stakeholder groups. You can introduce the role of social media as a vehicle for uniting the interests of individual stakeholders and present a case study of how a social media campaign has resulted in a change in the strategy of a specific business.
- Throughout all the activities completed in this learning aim, you should ensure that learners are always directed to identify the potential benefits and unintended consequences of proposed business tactics and long-term strategies. In doing so, your learners will start to become familiar with the notion of business risks. A case study can be used to look at business risks from the perspective of a new business start-up and an established business. Learners can be divided into groups, with one group looking at the risks of a new business start-up (e.g. drawn from an episode of the BBC's *Dragons' Den* series) and another group looking at an example drawn from an established business (e.g. new product development by some established manufacturer). Learners should be asked to classify the risks as either financial, legal or reputational, and suggest appropriate strategies to monitor and manage these risks.
- Learners can complete this aspect of the unit by identifying the relationship between the key learning points in a visual format, e.g. creating a spider chart or flow chart that highlights:
  - the features of the market
  - the influence of shareholders within the market
  - the identification, monitoring and management of business risks within the market.

### **Learning aim B – Investigate how intrapreneurship can be developed and promoted within an enterprise**

- This learning aim seeks to show:
  - how the conventional role of an entrepreneur can be adapted within an established business to promote an intrapreneurial business culture
  - the benefits of pursuing such a business strategy.

This goes much further than traditional 'employee engagement' objectives, since it will impact upon the respective roles and approaches to the work of both managers and employees, and will also impact on the individual profile of potential recruits into the business.
- You can introduce this learning aim to learners by showing a short video clip on 'What is an intrapreneur?'. There are a number of online resources available.
- Learners can then work independently to identify the types of leadership styles that could promote an intrapreneurial culture and those leadership styles that would inhibit the development of such a culture. Ask them to look back at your Unit 1 discussions into what makes an entrepreneur and identify any differences. You can use the results of this exercise to help learners to classify leadership styles into the main leadership classifications.
- Ask learners to carry out research to identify the different ways in which a business may be structured. The website [www.businesscasestudies.co.uk](http://www.businesscasestudies.co.uk) is a useful resource, along with websites that look at specific businesses such as the Apple organisational structure.
- The research conducted by the learners can be used to help them to classify



business structures into the main structure classifications.

- If your centre has a governing body, or a similar high-level strategic group with members drawn from local businesses, you can invite a representative to make a presentation to the class in which they explain how their business is structured. Ask your learners to prepare a list of questions to put to the guest speaker, covering aspects such as:
  - how their business is organised
  - an overview of their main market
  - how they engage with stakeholders
  - the main risks to their business
  - the business's approach to product or service innovation
  - how they would describe the predominant leadership style in the business
  - the strategies the business employs to identify and utilise the potential of their employees
  - the qualities they look for in new recruits.
- At this stage in the delivery of the unit, you can introduce an assignment that requires learners to identify best practice in intrapreneurship that has been introduced into a local or national business and the impact of this practice on its structure, management style and overall business performance.
- A follow-up video clip may enhance your learners' understanding of what an intrapreneurial culture looks like in practice. A number of video resources can be found online that focus on design principles and people interaction, by searching for 'intrapreneurial culture'. After watching the clip(s), ask learners to discuss the types of qualities required to work in such an environment and assess whether they would be comfortable working in this type of environment.
- Set learners a specific exercise in which they work in a group to address a specific business problem, e.g. how to address the concerns of a particular stakeholder group, or whether or not to market a new product. They will need to establish a strategy to implement any decisions they take and identify the responsibilities of individual members of the group in taking forward the strategy. This exercise can be filmed and used by learners to identify the characteristics of successful teams, the benefits of teamwork in an intrapreneurial business culture and the challenges presented in such a work environment.

**Learning aim C – Examine the ways in which an intrapreneur can contribute to the success of an enterprise**

- Learning aim C looks at the decision-making process and the personal qualities required by an intrapreneur.
- Provide an opportunity for learners to review the film of the group work completed at the end of learning aim B to determine the stages in the decision-making process, and how these stages could be implemented in a traditional business structure compared to an intrapreneurial business environment.
- Set learners a case study of a business decision and ask them to identify the main stages in the decision-making process and the associated responsibility and accountability of those involved in each stage in the process.
- Set up a class discussion in which learners explore the personal qualities that are needed in different work environments. They can then assess their own personal qualities and their potential for development.
- Learners can conduct research into local and national job advertisements and associated person specifications to assess what they consider to be:
  - the predominant management style of the business



## UNIT 8: ENTREPRENEURSHIP AND INTRAPRENEURSHIP IN PRACTICE

- the organisational structure of the businesses
- the main qualities required by recruitments into the business
- how far these qualities contribute to the development of an intrapreneurial culture.
- You can use the results of this research to facilitate a class discussion in which learners identify best practice in developing an intrapreneurial culture and consider how their own personal qualities and attributes could contribute towards such a work environment.





## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

- Unit 1: Enterprise and Entrepreneurs
- Unit 4: Launch and Run an Enterprise
- Unit 5: Survival and Growth

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Enterprise and Entrepreneurship. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

### Textbooks

Boddy D, *Essentials of Management – A Concise Introduction*, Pearson, 2012  
ISBN 9780273739289

Boddy D, *Management – An Introduction* (6th Edition), Pearson, 2014 ISBN  
9781292004242

### Websites

<http://www.britishchambers.org.uk/find-your-chamber> – Your Local Chamber of Commerce runs networking events so that you can make links with local businesses in your area.

[www.businesscasestudies.co.uk](http://www.businesscasestudies.co.uk) – includes a wide selection of case studies covering different aspects of the business environment, such as business structure and markets, that can be used to design classroom activities and assignments

<https://www.youtube.com/> – offers a variety of short videos and lectures. It also has links to episodes of Dragons' Den and Shark Tank.

*Pearson is not responsible for the content of any external internet sites. It is essential for tutors to preview each website before using it in class so as to ensure that the URL is still accurate, relevant and appropriate. We suggest that tutors bookmark useful websites and consider enabling learners to access them through the school/college intranet.*



## Unit 9: Innovation and Enterprises

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### Delivery guidance

#### Approaching the unit

Enterprises need to remain competitive. An enterprise must be able to produce products and services to meet the constantly changing demands of consumers, trends and technology. This unit will help learners to develop an understanding of how innovation is essential for enterprises to grow and survive in a competitive market. Learners will look at the role of innovation in determining the success of the enterprise and examine the stages of innovation.

You should encourage learners to research and study innovation and enterprises. They should look at the impact of different sources of innovation on the innovation process, and be able to provide evaluative evidence of the impact of the innovation on business performance. Learners should consider the case for innovation, its drivers and how innovation contributes to the success of enterprises. They should also examine the stages of innovation from development, to embedding, to assessing its effectiveness.

To complete this unit, your learners will need access to a range of research materials, which could include the internet, journals or magazines, and books.

You can use a range of delivery methods in this unit, for example:

- discussions – class and small group discussions on innovation and enterprises
- individual or group presentations
- case studies – illustrating innovation
- video – providing talks on innovation.

Group work is an acceptable form of delivery, but you must ensure that learners individually produce evidence that is sufficient for assessment.

#### Delivering the learning aims

##### Learning aim A

For learning aim A (Understand what is meant by innovation), you can introduce the topic by using real examples of innovative enterprises. Ask learners to share their knowledge of different enterprises, looking back at the other units they have previously studied, and how they believe they have been innovative. Guide learners to consider different types of innovation, for example, the process of creating something new or the enhancement of an existing product or service. Learners can also consider innovation that makes lives easier or enhances productivity in the workplace or improves health: for example, a device that tracks physical activity in real time, motivates increased physical activity and encourages a healthy lifestyle. Ensure that learners do not focus solely on innovation as technology and encourage them to broaden their thinking: for example, innovation in food, processes such as an incentive programme to reward high performing employees or the development of processes to streamline workflows.

Learners should consider that innovation is incremental, for example, a slight variation such as adding colour or changing a name, or ground-breaking, such as an innovation that revolutionises industry such as a smartphone or the worldwide web.

Divide learners into pairs or small groups and ask them to research one aspect of Drucker's theory on the Seven Sources of Innovation, and report back to the class.

You may also be able to enlist the help of local entrepreneurs to enhance your learners' experience. You could ask these entrepreneurs to speak on what they understand to be



the role of innovation, their experience of innovation and strategies to develop innovation. This could encompass different types of innovation in terms of produce, service, process and business model. A guest speaker could set a challenge for learners to come up with an innovation in their own business and later on in the unit, you could set up a competition and ask learners to vote on which is the most innovative idea.

Your learners can then carry out secondary research on innovative enterprises using the internet. This can be followed by primary research, consisting of independent or accompanied visits to enterprises in the locality. This will help learners to prepare a case study on innovation. This task is suitable for small groups or pairs.

### **Learning aim B**

For learning aim B (Explore the role of innovation in the success of an enterprise), you can introduce the topic with a presentation that looks at what drives innovation and how it can contribute to business success. Learners can then take part in group discussions that clarify this further. You can invite guest speakers from successful enterprises to visit your centre to present and discuss the ways in which they are innovative. Alternatively, you can provide case studies for appropriate enterprises for learners to interrogate. In small groups, your learners can carry out website research on the role of innovation in the success of an enterprise. Learners may also be able to gather information from work experience placements, part-time jobs or an organisation that they know well, for example, a retail outlet, and identify opportunities for innovation. They could then develop a case for innovation, identify drivers of innovation and how innovation contributes to the success of the selected enterprise.

### **Learning aim C**

For learning aim C (Examine the stages of innovation), learners can examine how introducing something new or innovative is easy in theory but difficult in practice. Although new ideas for products or services can be plentiful, selecting the best ideas, implementing and embedding them can be challenging. Discuss how the success of the innovation process relies on detailed research and planning, and how it is influenced by human factors and, of course, luck.

Ask learners to prepare and deliver a brief presentation on the stages of innovation (product/service/process development, embedding innovation and assessing the effectiveness of innovation). Learners should then be encouraged to ask appropriate questions. Ensure that they have considered suitable questions prior to the presentation, so that both presenters and viewers are getting the most out of this activity.



### Assessment model

Learning aim	Key content areas	Recommended assessment approach
<b>A</b> Understand what is meant by innovation	<b>A1</b> Types of innovation <b>A2</b> Drucker's seven sources of innovation	An in-depth case study of an innovation in a specific enterprise. The case study will cover the need for the development, how this was implemented and the impact the innovation had on the enterprise
<b>B</b> Explore the role of innovation in the success of an enterprise	<b>B1</b> The case for innovation <b>B2</b> Drivers of innovation <b>B3</b> How innovation contributes to the success of an enterprise	
<b>C</b> Explain the stages of innovation	<b>C1</b> Product/service/process development <b>C2</b> Embedding innovation <b>C3</b> Assessing the effectiveness of innovation	

### Assessment guidance

This unit is internally assessed through a number of independent tasks. Each task should cover at least one entire learning aim and it is essential that a learning aim is assessed as a whole and not split into tasks or sub-tasks per criterion.

There is a maximum number of one summative assignment for this unit. The relationship of the learning aims and criteria is:

Learning aims: A, B and C (A.P1, A.P2, B.P3, B.P4, C.P5, C.P6, A.M1, B.M2, C.M3, A.D1, B.D2, C.D3).

All learners must independently generate individual evidence that can be authenticated.

The main source of evidence is likely to be a case study; however, written reports or articles for a journal are also acceptable. Learners should incorporate in-depth research that is corroborated by a fully referenced bibliography.

Learners can also produce presentations. Suitable forms of evidence for a presentation include slides, preparation notes, script, cue cards, peer assessment records and an observation record. BTEC assessors can complete observation records and learners' colleagues in placements or part-time work can complete witness statements.

Observation records alone are not sufficient sources of learner evidence; the original learner-generated evidence must also support them. Assessors should remember that they are assessing the content of the presentation against the learning aim and not the skill with which the presentation was delivered.



## Getting started

**This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.**

### Unit 9: Innovation and Enterprises

#### Introduction

Begin by introducing the unit to learners through a group discussion exploring innovation in enterprises they know, whether through work on the units previously studied, or enterprises they have an interest in. This can be followed by outlining the learning aims of the unit.

#### Learning aim A – Understand what is meant by innovation

- You can begin by leading a discussion on innovation, and how being innovative does not mean inventing, but refers to changing or creating more effective processes, products and ideas.
- Explain how innovation can mean changing the business model and adapting to changes in the environment to deliver better products or services.
- Introduce Drucker's Seven Sources of Innovation theory.
- Ask learners in small groups to further research and make notes on Drucker's Seven Sources of Innovation.
- You may also be able to enlist the help of local entrepreneurs to enhance your learners' experience. You could ask these entrepreneurs to speak on what they understand to be the role of innovation, their experience of innovation and strategies to develop innovation. This could encompass different types of innovation in terms of produce, service, process and business model. A guest speaker could set a challenge for learners to come up with an innovation in their own business and later on in the unit, you could set up a competition and ask learners to vote on which is the most innovative idea.
- Divide learners into small groups or pairs to carry out secondary research, using the internet, on innovative enterprises. This can be followed by primary research consisting of independent or accompanied visits to enterprises in the locality. This will help learners to prepare a case study on innovation.
- Ask learners to prepare and deliver a presentation with professionally presented slides and speaker notes to give their findings to the class, following up with a question and answer session.

#### Learning aim B – Explore the role of innovation in the success of an enterprise

- You can begin by asking learners to consider how innovation can increase the likelihood of a business succeeding, e.g. by creating more efficient work processes, having better productivity and better performance.
- Using the virtual learning environment (VLE), ask learners to make a visual representation, e.g. a spider diagram, of what they would consider to be a 'culture of innovation' and what would be its advantages/disadvantages.
- Ask learners to work in small groups to research how innovation has made a number of enterprises more successful. Groups can either conduct independent research, or they can be given appropriate case studies. Ensure that a broad range of enterprises are covered in the group so as to include all the topics in the learning aim. Learners should then share their knowledge with their peers.
- Ask learners, in pairs, to prepare and deliver a brief presentation to the group on the role of innovation in a chosen enterprise, and how it has made the enterprise



more successful.

- Follow up with a question and answer session.

### Learning aim C – Examine the stages of innovation

- Introduce the stages of the innovation process, i.e. the way the innovation pathway works from creation of new ideas to their selection and implementation.
- Split the class into groups. Ask each to take a main area and think about how they influence the innovation process. For example:
  - the **person or people** who are involved in the process, e.g. the entrepreneur, the inventor and the innovator
  - the **possibility** of coming up with new ideas and making them happen, being creative, opportunity spotting
  - the **protection** of ideas through intellectual property and how this can help/hinder the innovation process
  - the **practice** of turning an idea into a new product or service.
- Ask each group to report back to the other groups and lead a class discussion on the findings.
- You can invite guest speakers from successful enterprises to visit your centre to talk about the innovation process in their business, and how they assess the success of innovation.
- Ask learners to carry out research in pairs or small groups and prepare a short report or article on how changing a process, product or service has impacted on an enterprise of their choice.
- Ask guest speakers to explain how once their innovation was successful, they assessed its effectiveness and embedded the innovation within their enterprise.
- Use the learners' findings to lead a discussion on the stages of innovation.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

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- Unit 4: Launch and Run an Enterprise
- Unit 5: Survival and Growth

## Resources

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### Journals

*Business Review* (Philip Allan Magazines) – a journal designed for Business Studies learners that includes relevant theoretical articles, as well as information on companies and markets.

### Videos

TEDEd offers a variety of relevant education videos (<http://ed.ted.com>).

TED offers online videos of short, powerful talks (18 minutes or less) covering almost all topics ([www.ted.com](http://www.ted.com)).

YouTube offers a variety of short videos and lectures ([www.youtube.com](http://www.youtube.com)).

### Podcasts

[www.thebusinesspodcast.co.uk](http://www.thebusinesspodcast.co.uk) – The Business Podcast is a weekly podcast to all tutors and learners on current business topics using contemporary, relevant online newspaper articles. Subscription is free.

[www.eofire.com](http://www.eofire.com) – Entrepreneurs on Fire

<http://helpmybusiness.com> – 'Help My Business!' helps entrepreneurs and small business owners to build their business.

<http://theintrovertentrepreneur.com> – The Introvert Entrepreneur provides services for introverts and those who live/work/plan with them.

### Websites

[www.businesscasestudies.co.uk](http://www.businesscasestudies.co.uk) – The Times 100 has economics and business case studies. The site also has a selection of theory notes aimed at learners.

[www.druckerinstitute.com](http://www.druckerinstitute.com) – website for the Drucker Institute

[www.entrepreneur.com](http://www.entrepreneur.com) – Entrepreneur magazine online has a variety of articles. Also available as an app on iTunes. <https://itunes.apple.com/us/app/entrepreneur-magazine/id466584564?mt=8>

[www.enterprise.ac.uk/index.php/case-studies](http://www.enterprise.ac.uk/index.php/case-studies) – Enterprise Educators UK is the national network for enterprise educators.

[www.mindtools.com/CommSkill/WritingSkills.htm](http://www.mindtools.com/CommSkill/WritingSkills.htm) – tips on how to develop good communication skills

[www.pjea.org.uk](http://www.pjea.org.uk) – information on The Peter Jones Enterprise Academy with links to case studies and examples

[www.slideshare.net](http://www.slideshare.net) – SlideShare has a number of resources.

[www.smallbusiness.co.uk](http://www.smallbusiness.co.uk) – website with news and articles for small businesses



[www.speakers4schools.org](http://www.speakers4schools.org) – Speakers for Schools is a UK charity that provides state secondary schools and colleges with talks from a range of industry leading professionals, public figures and academics, free of charge.

<http://ed.ted.com> – TEDEd has a growing library of lessons and educational videos.

[www.tes.com](http://www.tes.com) – TES online has a variety of free teaching resources.

[www.tutor2U.com](http://www.tutor2U.com) – This site provides study notes for learners. There are also links to other sources of information.

*Pearson is not responsible for the content of any external internet sites. It is essential for tutors to preview each website before using it in class so as to ensure that the URL is still accurate, relevant and appropriate. We suggest that tutors bookmark useful websites and consider enabling learners to access them through the school/college intranet.*





## Unit 10: Recruitment and Selection Process

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### Delivery guidance

Please note that this delivery guide only offers a guide to the teaching and learning phase of the unit and does not offer a guide as to how to run the assessment phase.

### Approaching the unit

Effective recruitment and selection ensures that the best people are working in the most suitable roles in organisations. Learners will have the opportunity to take part in interviews acting as both the interviewer and the interviewee and consider the employment laws to which all organisations must abide when they are making the decision to recruit.

Learners will also self-reflect on their interview performance to prepare and allow them to plan for potential future interviews.

### Delivering the learning aims

#### Learning aim A

Learning aim A is best introduced through using real examples of large businesses, that is, those that employ more than 250 people. Learners will then need to select one business in order to complete the evidence towards the assessment criteria. You could use case studies to help demonstrate the ethical and legal requirements of recruitment and selection, for example, <http://businesscasestudies.co.uk/tesco/recruitment-and-selection/introduction.html#axzz4PKDYiCLL>. The use of guest speakers, such as HR managers, would aid the delivery of this learning aim. Local business networking events/ hubs, often run by your local Chamber of Commerce and Speakers for Schools, will help you make links with businesses and organise talks from professionals. Talks from guest speakers could be on workforce planning and the reasons why organisations need to recruit more employees, the different recruitment methods used and which external bodies, if any, are used to contribute to the process. You will need to explain the strengths and weaknesses of all of the above to learners.

#### Learning aim B

For learning aim B, learners will need to produce their own recruitment and selection documentation, including a job advertisement, job analysis, job description, person specification, application form, CV and letter of application. You could consider inviting a local careers adviser to your centre to distribute some sample forms for reference and advise learners on the appropriate completion of these forms. Ask learners to research some job opportunities, both online and in print – and these could be internal and external. You could use your centre for any internal examples. Learners could then create a discussion board on Padlet, or other platform, to discuss the reasons behind the placement of these adverts. You could then give learners some examples of good and poor job descriptions and person specifications and ask them to comment on the appropriateness of these. In addition, you could split up parts of a well written job description and person specification and ask learners to decide which parts belong to a job description and a person specification.

Learners should then have the opportunity to prepare an application form, CV and letter of application and other documentation for their chosen job role.



Once learners have completed the appropriate job applications, CVs and letter of application, you could split the class into small groups. Each group will have the recruitment forms along with the job description and the person specification for members of a different group. They would then act as the recruiter and review the applications from the other group.

You could then set up an interview role-play situation in which all learners have the opportunity to be an interviewer, interviewee and observer. You could put learners in groups of three, with the groups chosen by those who have completed documentation for similar job roles, and then they will all need to prepare questions as the interviewer and research their other group members' job roles. They will also need to prepare their own answers to questions as the interviewee. They could also be an observer of the interviews and complete an appropriate observation form.

Any notes or preparation could then be kept as evidence for the assessment criteria and you will also need to complete a record of practical activity. As an interviewer, the learners will need to design appropriate interview questions. After the interviews have taken place, a feedback form could be completed by the interviewer – this could be done on SurveyMonkey or other survey software – and the interviewees could also reflect on their own performance, including the analysis of the activity, questions asked, appropriateness of documentation and evaluation of the documentation.

### **Learning aim C**

Learning aim C will allow the learners to further reflect on the recruitment and the selection process that they have been involved in; they could do this as a recording where they individually appraise themselves as the interviewer, interviewee and observer. You should ensure they appraise their communication skills, organisation skills and how these will support their employability skills. Learners will then need to complete a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. This could be done initially through images. You could give learners a range of magazines/newspapers and ask them to tear out images that best describe their strengths, weaknesses, opportunities and threats with regard to how they performed in their interview. They could then explain their choice of images to the rest of the class. This may then help them articulate their SWOT analysis that they complete. If you have taken any photos during the interview process, these could be used for learners in completing their SWOT analyses to support their explanations. They will also need to critique the documentation they prepared and review what skills they need to develop and produce an action plan, highlighting how they will address any weaknesses that they have identified.



**Assessment model (in internally assessed units)**

Learning aim	Key content areas	Recommended assessment approach
<p><b>A</b> Examine how effective recruitment and selection contributes to business success</p>	<p><b>A1</b> Recruitment of staff  <b>A2</b> Recruitment and selection process  <b>A3</b> Ethical and legal considerations in the recruitment process</p>	<p>A report that examines the recruitment process in a large business</p>
<p><b>B</b> Undertake a recruitment activity to demonstrate the processes leading to a successful job offer</p>	<p><b>B1</b> Job applications  <b>B2</b> Interviews and skills</p>	<p>Learners must participate in a recruitment and selection activity. They will need to interview and be interviewed, and complete the appropriate documentation.</p>
<p><b>C</b> Reflect on the recruitment and selection process and your individual performance</p>	<p><b>C1</b> Review and evaluation  <b>C2</b> SWOT analysis and action plan</p>	<p>Learners will need to evidence all the documents created.</p> <p>Ability to self-critique performance, including what could have gone better and what skills need to be developed, so that learners can enhance their employability</p> <p>SWOT analysis on performance in their interviewing activity linked to their personal future</p>



## Assessment guidance

This unit is internally assessed through a number of tasks. Each task should cover at least one entire learning aim and it is essential that a learning aim is assessed as a whole, and not split into tasks or sub-tasks per criterion. There are a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aims: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, C.P6, B.M2, C.M3, B.D2, C.D3)

All learners must work independently and generate their own evidence towards the achievement of the learning aim(s) and this must be appropriately authenticated. The unit specification suggests a report for learning aim A and a recruitment and selection activity for learning aims B and C. Learners should ensure that research is fully referenced with a bibliography.

However, you are not confined to these evidence types. Where more appropriate for learners, different evidence types could be used, for example, verbal reports, podcasts, video diaries etc.

For the assessment of learning aim A, it is recommended learners produce a report. They must select an appropriate large business (employing 250 people or more) and examine their recruitment process.

The assessment of learning aims B and C is through a practical recruitment activity. This is most likely in a role-play situation. You will need to complete a record of practical activity for the criteria that is practical. However, please be aware that learners will also need to provide evidence for these criteria, in addition to your record of practical activity, for example, photos, scripts, research etc. Learners will then need to reflect on their performance as an interviewer, interviewee and could be an observer. You will need to record the interview process, where possible, and ensure you give feedback to learners on their performance so that this can help them develop their SWOT analysis for learning aim C. Learners will need to show competent communication skills and you will also need to ensure that learners develop appropriate interview questions that clearly relate to the job role of the classmate who they are interviewing. The questions that they develop also need to assess the skills and knowledge of the interviewee. You will also need to ensure that learners develop a fair system for monitoring interviews and select the most suitable candidate for the job role.



## Getting started

This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.

### Unit 10: Recruitment and Selection Process

#### Introduction

For this unit, you need to ensure that learners have access to the recruitment and selection process in a large business and that they then have the opportunity to take part in an interview process, as an interviewer and interviewee. You will also need to ensure that you give feedback to each learner so that they can effectively develop their SWOT analysis in learning aim C.

#### Learning aim A – Examine how effective recruitment and selection contributes to business success

Learning aim A is best introduced through using real examples of large businesses, i.e. those that employ more than 250 people. Learners will then need to select one business in order to complete the evidence towards the assessment criteria. Case studies could also be used when looking at the ethical and legal requirements of recruitment and selection, e.g.

<http://businesscasestudies.co.uk/tesco/recruitment-and-selection/introduction.html#axzz4PKDYiCLL> or  
<https://www.eremedia.com/ere/a-case-study-of-google-recruiting/>

- If possible, set up opportunities for learners to visit the business they have chosen to report on, or organise phone or video conferencing meetings so that learners can speak to recruiters within the business. If the management of the business is willing, set up a mentor who deals with recruitment and ask them to work with the learner or a group of learners throughout the unit tasks.
- Learners could also take a quiz to see which career/job role would best suit them, visit the links at <http://www.career-test.co.uk/> or <https://www.theguardian.com/lifeandstyle/2014/nov/11/-sp-questionnaire-what-job-would-make-you-happiest>
- The use of guest speakers, such as HR managers, would aid the delivery of this learning aim. Local business networking events and hubs, often run by your local Chamber of Commerce and Speakers for Schools, will help you make links with businesses and set up talks from professionals.
- Invite guest speakers to talk about workforce planning and the reasons why organisations need to recruit more employees. They could also describe the different recruitment methods used and which external bodies, if any, are used to contribute to the process. The strengths and weaknesses of all of the above could be explained.
- You could then get the learners to look at various job adverts that exist in a selected large business and start a discussion board on Padlet (or another platform) with regard to the reasons for the placement of the advert and the type of website chosen for the advert. Any internal adverts for your centre could be shown to learners (if appropriate) to consider how businesses recruit internally as well as externally.
- You could also create a poll or discussion on Kahoot/Socrative on the use of CVs versus application forms and the use of online application forms rather than paper



based. Ask learners to consider the role that technology has in improving the cost-effectiveness of the recruitment process.

- Learners should consider ethical and legal requirements in the use of job adverts and other recruitment documentation and processes.
- Set learners a task to research high profile cases where the selection process for a job has been questioned and discuss with learners how the different types of selection and interview contribute to the outcome of an interview. Ask them to come up with a list of advantages and disadvantages of the different types of interview process.
- You could then ask learners to consider the ethical and legal requirements concerning the documentation they have created, i.e. confidentiality, standardised interview questions, standardised selection criteria, The Equality Act, documentation and right to work checks. Ask learners to compare their own documentation with that of the business they have chosen to report on and comment on the differences or similarities.

### **Learning aim B – Undertake a recruitment activity to demonstrate the processes leading to a successful job offer**

- Once learners have selected an appropriate large business, they will need to create a job advert for a specific role. They can then undertake an analysis of the job and create a job description and person specification. They should then also create a CV and letter of application and application form. Ensure that your learners are aware of the need to complete an application form in full.
- You could invite a local careers adviser or someone from the HR department of the chosen business to advise learners on the appropriate completion of these forms.
- You could get learners to research advertisements for some job opportunities, both online and in print, and these could be internal and external. You could use your centre for any internal examples.
- Learners could then create a discussion board on Padlet, or another platform, to discuss the reasons for the placement of these adverts.
- You could then give learners some examples of good and poor job descriptions and person specifications and ask them to comment on the appropriateness of these for the job they are advertising. In addition, you could divide up parts of a good job description and person specification and ask learners to decide which parts belong to a job description and a person specification.
- Once learners have completed their appropriate job applications, CVs and letter of application, you could split the class into small groups. Each group will have the recruitment forms, along with the job description and the person specification for members of a different group. They would then review the applications from the other group.
- You could then set up an interview role-play situation, in which all learners have the opportunity to be an interviewer, interviewee and possibly an observer. You could put learners in groups of three, with the groups chosen by those who have completed documentation for similar job roles, and then they will all need to prepare questions as the interviewer and research their other group members' job role and also prepare their own answers to questions as the interviewee. They could also be an observer of the interviews and complete an appropriate observation form.
- Any notes or preparation could then be kept as evidence for the assessment criteria and you will also need to complete a record of practical activity.
- As an interviewer, the learners will need to design appropriate interview questions.
- Ensure that as part of their interview, learners demonstrate a work-related



competence and that their interview questions include this.

- Invite a guest from one of the learners' chosen businesses to carry out additional mock interviews, or be interviewed and ask for their feedback in a group session afterwards.
- After the interviews have taken place, a feedback form could be completed by the interviewer; this could be done on SurveyMonkey or other survey software, and the interviewees could also begin to reflect on their own performance, including the analysis of the activity, questions asked, appropriateness of documentation and evaluation of the documentation.

### **Learning aim C – Reflect on the recruitment and selection process and your individual performance**

- You will need to ensure that learners are given feedback on the roles that they have undertaken in their role play as this will form part of their SWOT analysis. Furthermore, learners will need to reflect on the recruitment and the selection process that they have been involved in; they could do this as a recording where they individually appraise themselves as the interviewer, interviewee and observer.
- You should ensure that learners appraise their communication skills and organisation skills and how these will support their employability skills. Learners will then need to complete a SWOT analysis. This could be done initially by using images. You could give learners a range of magazines and newspapers or online sources and ask learners to tear out or save images that best describe their strengths, weaknesses, opportunities and threats with regard to how they performed in their interview. They could then explain their choice of images to the rest of the class. This may then help them articulate their SWOT analysis.
- If you have taken any photos during the interview process, these could be used to help learners in completing their SWOT analyses to support their explanations. They will also need to critique the documentation they prepared and review what skills they need to develop and produce an action plan, highlighting how they will address any weaknesses that they have identified.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

This is an optional unit but does still have some links with other units. Most specifically, however, this unit links to:

- Unit 6: Business Decision Making
- Unit 12: Principles of Management
- Unit 13: Developing an Enterprise Strategy

Learners who have completed this qualification in a year may progress to further learning at Level 3, for example, to a larger size BTEC National in the enterprise sector.

When studied with other qualifications in the study programme, learners can progress into higher education on combined courses. Learners could also progress on to Higher Apprenticeships in areas such as business administration, marketing, accounting, sales or enterprise. This qualification will also give learners the skills to enter self-employment.

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Enterprise and Entrepreneurship. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

### Journals

*EBEA* – Economics and Business Educators Association produce magazines for Business, Economics and Enterprise educators in order to continually drive up standards.

### Videos

- TEDed offers a variety of relevant education videos (<http://ed.ted.com>)
- TED offers online videos of short, powerful talks (18 minutes or less) covering almost all topics ([www.ted.com](http://www.ted.com))

### Podcasts

[www.thebusinesspodcast.co.uk](http://www.thebusinesspodcast.co.uk) – The Business Podcast is a weekly podcast to all tutors and learners on current business topics using contemporary, relevant on-line newspaper articles. Subscription is free.





## Websites

<http://www.britishchambers.org.uk/find-your-chamber> – Your Local Chamber of Commerce runs networking events so you can make links with local businesses in your area.

<http://businesscasestudies.co.uk/tesco/recruitment-and-selection/introduction.html#axzz4PKDYiCCLL> – Case study on recruitment and selection at Tesco.

<http://www.career-test.co.uk/> – Quick test for learners to do to see what sort of career would be most suitable for them.

<https://www.enterprise Catalyst.co.uk> – Enterprise Catalyst is a useful site to find out how enterprising you are, with a free skills type audit to complete.

[www.enterprise.ac.uk/index.php/case-studies](http://www.enterprise.ac.uk/index.php/case-studies) – Enterprise Educators UK is the national network for enterprise educators. Members post case studies that demonstrate the impact of enterprise and entrepreneurship education.

<https://www.eremedia.com/ere/a-case-study-of-google-recruiting/> – Case study on the success of Google's recruitment.

<https://www.theguardian.com/lifeandstyle/2014/nov/11/-sp-questionnaire-what-job-would-make-you-happiest> – The Guardian has produced a quiz to see what job would make you the happiest.

[www.slideshare.net](http://www.slideshare.net) – SlideShare has a number of resources including coverage of recruitment and selection.

[www.speakers4schools.org](http://www.speakers4schools.org) – Speakers for Schools is a UK-based charity providing secondary schools and colleges with talks from a range of industry professionals, public figures and academics, free of charge.

<https://successatschool.org/careerzones> – Success at School is a website giving useful advice on different careers and information on how to complete application forms effectively.



## Unit 11: Marketing Communications

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### Delivery guidance

#### Approaching the unit

The way businesses communicate with their customers is an integral part of their success. Marketing communications is a key component of a business' overall marketing strategy, which enables the enterprise to boost revenue and awareness. Learners will need to consider the marketing communications used by different types of organisations, as organisations such as charities also use marketing communications to boost awareness of their cause and stimulate donations.

You will need to ensure that learners research a range of techniques that different businesses use to communicate with their customers, including advertising, sales promotions, personal selling, direct marketing and public relations. They will also need to be aware of and understand the processes involved in creating a successful marketing communications plan.

#### Delivering the learning aims

##### Learning aim A

Learning aim A could be introduced by using a guest speaker from Speakers for Schools who could comment on the reasons why various marketing communications are used by selected businesses. If an external speaker is not possible, you could present case studies featuring different types of businesses that will help learners to understand the purpose of marketing communications and the reasons for variation. You could give learners examples of different types of marketing communications from different types of organisations and ask them to discuss the purpose of each type and how these communications achieve this. You need to ensure that learners are given some communications that have potential ethical or cultural issues to enable them to comment on why these might be an issue, and any legal concerns that might arise from these. An example from the Advertising Standards Authority could be used here. In addition, see the resources list for the Top Ten Worst ads of 2015.

Learners could then select one of the marketing communications given and share information with the rest of the group on how the selected communication shares the required information with customers effectively, how it removes certain barriers to communication, how it effectively uses AIDA (attention, interest, desire, action) and how the choice of the fonts, colours, images and so on help to communicate a brand image to customers. There may also be examples where the communication does not work effectively and learners can discuss this.

##### Learning aim B

For learning aim B, you could ask learners to select and research further a charity that has used effective marketing communications. Learners will also need to consider a contrasting business, for example, a profit-making organisation. Ask learners to look at the different marketing communications from their selected charity and explain how these communications raised awareness and boosted revenue and then contrast them with those of a profit-making organisation.



You could then set a research task for learners to complete in which they find examples of different types of marketing communications from different types of organisations, such as print advertising, internet advertising, billboards, pop-ups, celebrity endorsements, money off coupons, loyalty cards, product launches and competitions. They could also look at website monitoring activity, email campaigns to customers, retail sales, point of sale merchandising, blogs, social media etc.

Ask learners to present their findings back to the group and the group could then complete a poll on Kahoot to select the ones that they will research further for their portfolio of evidence. Learners could create a discussion board, focussing on the similarities and the differences between the two different communications. You will also need to encourage learners to look at evidence of the success of the chosen marketing campaigns and evaluate the communications in achieving this.

### **Learning aim C**

Learning aim C requires learners to develop a marketing communications package. You could give them examples of good and poor marketing communications packages and ask them to discuss the strengths and weaknesses of each.

Divide learners into groups and give each group an example of a product or service. They should then research the given product or service and present their findings back to the class, for example, via a recording. Learners should research and discuss the aims and objectives, the target market, what communication tools have been used, why the mix of communications is appropriate, what resources have been used and what constraints the business may have faced in the making of the communications.

Learners should then select a product or service for which they will develop a communications package. You could ask learners first to think of examples of products or services that they do not think are marketed as well as they could be, or a new product or service that they believe needs more effective marketing communications. Learners will need to consider the aims and objectives of the communication plan, identify their target market, produce a summary of the communications tools they propose to use, identify an appropriate mix of communications tools that are appropriate for their target market, what resources are needed in terms of physical, financial and personnel resources and what constraints they may need to overcome, for example, lack of funding, time and ethics.



**Assessment model (in internally assessed units)**

Learning aim	Key content areas	Recommended assessment approach
<p><b>A</b> Explore the purpose of marketing communications in achieving marketing aims and objectives</p>	<p><b>A1</b> Purpose of marketing communications  <b>A2</b> Effective communication  <b>A3</b> Choice of media  <b>A4</b> Ethical issues</p>	<p>A marketing communication plan that details the purpose of marketing communications in achieving increased awareness and compares the marketing communication techniques used by a specific business and a named charity. Two contrasting businesses.</p>
<p><b>B</b> Investigate marketing communications techniques used to raise awareness and boost revenue</p>	<p><b>B1</b> Advertising  <b>B2</b> Sales promotion  <b>B3</b> Public relations  <b>B4</b> Direct marketing  <b>B5</b> Personal selling  <b>B6</b> Communication tools</p>	
<p><b>C</b> Present a marketing communications plan to a client for a specific product or service</p>	<p><b>C1</b> Plan a marketing communications package  <b>C2</b> Present a marketing communications package</p>	<p>A presentation to a client containing all elements of the marketing communications plan for a specific product or service, including timelines and costs</p>



## **Assessment guidance**

This unit is internally assessed through a number of tasks. Each task should cover at least one entire learning aim and it is essential that a learning aim is assessed as a whole, and not split into tasks or sub-tasks per criterion. There are a maximum number of two summative assignments for this unit. The relationship of the learning aims and criteria is:

Learning aims: A and B (A.P1, A.P2, B.P3, A.M1, B.M2, A.D1, B.D2)

Learning aim: C (C.P4, C.P5, C.M3, C.D3)

All learners must work independently and generate their own evidence towards the achievement of the learning aim(s) and this must be appropriately authenticated. The unit specification suggests a report for learning aims A and B and a marketing communications plan to a client for learning aim C. Learners should ensure that research is fully referenced with a bibliography.

For the assessment of learning aims A and B, learners are asked to produce a report that explains the purpose of marketing communications, the legal and ethical issues that could affect the marketing strategy and how these are used to raise awareness and boost revenue.

For learning aim C, learners will produce a marketing communications plan.



## Getting started

This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.

### Unit 11: Marketing Communications

#### Introduction

In this unit, learners will need to explain the purpose of marketing communications in raising awareness and boosting revenue for different businesses and describe the different types. Learners will then select their own product or service and create a marketing plan that meets the needs of their target audience.

#### Learning aim A – Explore the purpose of marketing communications in achieving marketing aims and objectives

- You could source a guest speaker from Speakers for Schools or another appropriate organisation to talk to learners about the reasons why various marketing communications are used by selected businesses. If this is not possible, you could use case studies that will help explain to learners the purpose of marketing communications.
- Give learners examples of different types of marketing communications from different types of organisations and ask the group to discuss the purpose of each type and how these communications achieve this. You need to ensure that learners are given some communications that have potential ethical or cultural issues to enable them to comment on why this is so, and any legal issues that learners need to be aware of. The Advertising Standards Authority could be used for examples here. In addition, see the resources list for Top Ten Worst ads of 2015.
- Learners could then select one of the marketing communications given and share information with the rest of the group on how the selected communication shares the required information with customers effectively, how it removes certain barriers to communication, how it effectively uses AIDA and how the choice of the fonts, colours, images and so on help to communicate a brand image to customers. Ask them to pay attention to how the choice of media is important to the communication and its success in terms of its message and target market. There may also be examples where the communication does not work effectively and learners can discuss this.

#### Learning aim B – Investigate marketing communications techniques used to raise awareness and boost revenue

- Ask learners to select and research further a charity that has used effective marketing communications, for example, from <https://econsultancy.com/blog/62947-seven-inspiring-examples-of-charity-non-profit-marketing-campaigns/>. Learners will also need to consider a contrasting business, for example, a profit-making organisation such as Direct Line <http://www.campaignlive.co.uk/article/case-study-direct-line-fixed-insurance-market/1404015#>. Ask learners to look at the different marketing communications from their selected charity and explain how these communications raised awareness and boosted revenue and then contrast them with those of a profit-making organisation. You could then set a research task for learners to complete in which they find examples of different types of marketing communications from different types of organisations, such as print advertising, internet advertising, billboards, pop-ups, celebrity endorsements, money off coupons, loyalty cards, product launches and competitions. They could also look at website monitoring activity, email campaigns to customers, retail sales, point of sale merchandising,



blogs, social media etc.

- Learners could then present their findings back to the group and they could complete a poll on Kahoot to select the ones that they will research further for their portfolio of evidence.
- Learners could then create a discussion board, focussing on the similarities and the differences between the two different communications. You will also need to encourage learners to look at evidence of the success of the chosen marketing campaigns and evaluate the communications in achieving this.

**Learning aim C – Present a marketing communications plan to a client for a specific product or service**

- You could give learners examples of good and poor marketing communications packages and ask them to discuss the strengths and weaknesses.
- Divide learners into groups and give each group an example of a product or service. They should then research the given product or service and present back to the class their findings, for example, via a recording.
- Ask learners to research and discuss the aims and objectives, the target market, what communication tools have been used, why the mix of communications is appropriate, what resources have been used and what constraints the business may have faced in the making of the communications.
- Learners should then select a product or service for which they will develop a communications package. They will need to present their communication plan to an audience and ensure that their plans meet the needs of their target audience. You will need to ensure therefore that an appropriate target audience (client) is outlined in a brief so that the learners can decide on the appropriate aims and objectives of their communications plan and how to present this. Learners could use Kickstarter, which although a crowdfunding page, has many examples of businesses that would benefit from a tailored marketing communications plan. The information on the selected product or service is available on this site and this would enable learners to decide on the target audience and aims and objectives.
- You could ask learners as a group, first, to think of examples of products or services that they do not think are marketed as well as they could be, or a new product or service that they believe needs more effective marketing communications. This discussion should help learners to develop their communication plan further. Learners will need to consider the aims and objectives of their communication plan, identify their target market, produce a summary of the communications tools they propose to use, identify an appropriate mix of communications tools that are appropriate for their target market, what resources are needed in terms of physical, financial and staff resources and what constraints they may need to overcome, for example, lack of funding, time and ethics.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

This is an optional unit but does still have some links with other units. Most specifically, however, this unit links to:

- Unit 2: Developing a Marketing Campaign
- Unit 4: Launch and Run an Enterprise
- Unit 8: Entrepreneurship and Intrapreneurship in Practice
- Unit 13: Developing an Enterprise Strategy

Learners who have completed this qualification in a year may progress to further learning at Level 3, for example, to a larger size BTEC National in the enterprise sector.

When studied with other qualifications in the study programme, learners can progress into higher education on combined courses. Learners could also progress on to Higher Apprenticeships in areas such as business administration, marketing, accounting, sales or enterprise. This qualification will also give learners the skills to enter self-employment.

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Enterprise and Entrepreneurship. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

### Journals

*EBEA* – Economics and Business Educators Association produce magazines for Business, Economics and Enterprise educators in order to continually drive up standards.

### Videos

- TEDed offers a variety of relevant education videos (<http://ed.ted.com>)
- TED offers online videos of short, powerful talks (18 minutes or less) covering almost all topics ([www.ted.com](http://www.ted.com))

### Podcasts

[www.thebusinesspodcast.co.uk](http://www.thebusinesspodcast.co.uk) – The Business Podcast is a weekly podcast for all tutors and learners on current business topics using contemporary, relevant online newspaper articles. Subscription is free.

### Websites

<http://www.britishchambers.org.uk/find-your-chamber> – Your Local Chamber of Commerce runs networking events so you can make links with local businesses in your area.

<http://uk.businessinsider.com/the-10-worst-ads-of-2015-12?r=US&IR=T> – Examples of UK's Top 10 worst adverts of 2015.

<http://www.campaignlive.co.uk/article/case-study-direct-line-fixed-insurance-market/1404015#> – Case study on Direct Line's: The Fixer Marketing campaign.

<https://econsultancy.com/blog/62947-seven-inspiring-examples-of-charity-non-profit-marketing-campaigns/> – Examples of effective charity marketing communications.





<https://www.entreprisecatalyst.co.uk> – Enterprise Catalyst is a useful site to find out how enterprising you are, with a free skills type audit to complete.

[www.enterprise.ac.uk/index.php/case-studies](http://www.enterprise.ac.uk/index.php/case-studies) – Enterprise Educators UK is the national network for enterprise educators. Members post case studies that demonstrate the impact of enterprise and entrepreneurship education.

<https://www.theguardian.com/voluntary-sector-network/2014/jan/31/10-years-time-charity-communications-2024> – The Guardian article about charity marketing communications in the future.

<http://www.slideshare.net/amitgehi/unethical-advertisements-26191813> – SlideShare has a number of resources including coverage of unethical advertising.

[www.speakers4schools.org](http://www.speakers4schools.org) – Speakers for Schools is a UK-based charity providing secondary schools and colleges with talks from a range of industry professionals, public figures and academics, free of charge.

<https://successatschool.org/careerzones> – Success at School is a website giving useful advice on different careers and information on how to complete application forms effectively.



# Unit 12: Principles of Management

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## Delivery guidance

### Approaching the unit

This unit gives your learners opportunities to apply the principles of management to a variety of business situations. In doing so they will gain a greater understanding of the challenges faced by managers, and discover that different management approaches can be taken to address issues relating to aspects such as change management and motivation in the workplace.

Learners will be introduced to the work of management theorists and investigate their influence on contemporary management practices.

The suggested range of activities below will enable your learners to appreciate how the functions of management can be applied in a practical setting and develop their personal skills in areas such as critical thinking and working with others.

You can use a range of delivery methods in this unit, such as:

- discussions, e.g. class and small group discussions on leadership styles
- individual or group presentations, e.g. covering business culture
- case studies of leadership styles in well-known and lesser-known businesses
- videos.

Group work is an acceptable form of delivery, but you must ensure that each learner produces sufficient evidence on their own for assessment.

You can involve local employers in the delivery of this unit by inviting them as:

- guest speakers
- providers of opportunities for learner visits
- providers of business materials as exemplars
- mentors for learners.

### Delivering the topics

Topic A introduces your learners to several different management theories and their practical application in the workplace. By looking at different approaches to management your learners will begin to appreciate that there may be different ways in which workplace issues can be addressed. You should therefore focus on the practical application of the different management approaches through relevant examples of workplace situations in which the different theories could be applied. Some of your learners may have undertaken work experience or have part-time jobs, and you could use their acquired knowledge to identify how different approaches to management have been applied in their own workplaces.



Similarly, the notion of business culture could be introduced with reference to your learners' own background and experience, e.g. the cultural features of their own school or college. This could then lead on to your learners undertaking research on different businesses to identify how factors such as management style, policies and procedures, and the structure of a business can all influence business culture.

By the completion of topic A, your learners should have a clear understanding of the main functions of management and the difference between leadership and management with reference to leadership traits and management skills.

Topic B builds on the areas covered in topic A by looking in more depth at different leadership models. You should challenge your learners so that they appreciate that different situations may demand different styles of management and call upon different management skills. You should also give your learners the opportunity to justify their own approach to managing different scenarios and to be able to evaluate critically the approach taken by their peers to the same workplace issue.

Topics C and D both focus on managing people. Topic C looks at the human resources function and its contribution to the business planning process. Your learners will be able to draw on the knowledge gained in other areas of the BTEC National programme to highlight some of the key areas in this process including establishing the mission of the business and its underlying values. Refer to the work covered in previous topic areas on business culture. Your learners should consider the contribution of labour market intelligence to business planning taking into account the impact of globalisation on the mobility of labour.

The implementation of human resource strategies will involve different approaches to labour recruitment which contribute to the overall flexibility of the workforce. Your learners need to understand the increasing move towards greater flexibility in the labour force and the practical ways businesses have sought to increase flexibility in their own workforce in areas such as zero hours contracts, outsourcing and the engagement of agency staff.

By completing the suggested activities in this delivery guide your learners will appreciate that the need for flexibility in the workplace can bring with it significant management challenges relating to labour turnover, absenteeism and motivation, which can all influence business culture and business performance.

Topic D focuses on one specific aspect of these management challenges – motivation. Your learners will again be introduced to a number of management theorists who have influenced management practices, such as Maslow, Herzberg and Mayo. You should give your learners an overview of the work of these theorists so that they can apply them in a practical setting.

Besides requiring a flexible workforce, other major challenges faced by businesses concern the availability of skilled labour and the need for continuous skills development of their existing workforce.

Your learners will be familiar with performance appraisal from the perspective of their own individual learning plans and targets. You can use this knowledge and experience to introduce the role of performance appraisal in a business setting. It would be useful for your learners to look at examples of some of the forms used in a performance management system and, for some light relief, show them film clips of bad management practice relating to performance management interviews.

Self-assessment and 360 degree appraisal can again be explained from your learners' own experience and background. For example, they can update their own individual learning plan to include their own strengths and areas for



development and associated personal targets and a 360 degree appraisal approach can be introduced by reviewing the BTEC National programme.

Topic E is concerned with the practical application of stakeholder theory. In preparing to teach this topic you may wish to look at Medelow's Matrix, which considers the relative power and influence of stakeholders in specific business situations. Learners should be introduced to the concept of the internal and external business environment and the role and influence of stakeholders in different settings. As with other aspects of the unit, you should aim to emphasise to your learners the challenges faced by business leaders, owners and management in trying to reconcile the competing interests of stakeholders. Primarily, the different interests between the needs of employees and the business are likely to be recognised and understood by learners, but other relationships are more complex – for example, the tension that exists between retaining profits for future investment and growth and the demands of some shareholders for increased dividend payments.

Topic F returns to the notion of business culture focusing specifically on the manager's involvement in quality management systems. An understanding of the vocabulary of quality management can be drawn from an overview of ISO 8402, which defines such terms as quality assurance, quality control and total quality management (TQM). The latter is particularly relevant to the role of the manager and your learners need to be able to understand the main features of TQM and its practical application in a business along with the responsibilities of managers to ensure its effective operation.

Your learners will also need to be able to identify the costs and benefits of a quality management system, including its influence on business culture and its impact on financial and non-financial performance measures.

### **Assessment guidance**

This unit is assessed externally. Learners will be given a case study two weeks prior to the supervised assessment in order to carry out research. In preparing for the external assessment, you should make your learners aware of the assessment objectives detailed in the unit specification. Your learners may find it useful to maintain an ongoing glossary of key terms, which they could complete after each lesson or at the end of a particular topic. This would be a useful revision guide when preparing for the external assessment and would enable your learners to answer those questions in the assessment focused upon the recall of facts, key terms and definitions.

Undertaking the research activities and case studies suggested in this delivery guide will help your learners approach those questions in the assessment that require an understanding of management concepts and their application. The external assessment will also require your learners to analyse and evaluate how management principles are implemented and practised in workplace scenarios. They will need to bring together their knowledge and ideas from several different sources in order to justify their recommendations. In revision sessions, you could lead classroom discussions focused on a critical evaluation of the recommendations of their peers drawn from case studies and business scenarios, as a useful strategy for developing your learners' evaluation skills. Revision sessions could also pick out key points from case studies and link them to theory.



## Getting started

This gives you a starting place for one way of delivering the unit.

### Unit 12: Principles of Management

#### Introduction

Begin by introducing the key focus of this unit: understanding the principles of management and knowing how different models of management and their application in different workplace settings can significantly influence all aspects of the business, including its predominant culture and approach to quality improvement. The ultimate aim of this unit is for learners to be able to suggest appropriate management strategies to improve business performance and address the contemporary challenges faced by businesses.

#### Topic A – The definitions and functions of management

- You could begin by introducing your learners to aims of the unit, including an overview of the content of the topics and how they will be assessed. This would give the basis of the types of activities in which your learners will be engaged.
- It is important for your learners to understand that there are different approaches to management influenced by management theorists. Your learners should be familiar with the works of Drucker (management by objectives), Hersey-Blanchard (situational management) and Adair (action-centred management), as well as other approaches to management such as functional management (specialist functions), transformational management (focused upon change management) and transactional management (emphasis on performance and compliance). You should give an overview of these management approaches and introduce your learners to a range of scenarios in which different management approaches could be applied. You should encourage classroom discussions to allow your learners the opportunity to evaluate critically the suggestions put forward by their peers.
- The main functions of management are best understood from an analysis of business operations and activities such as marketing, purchasing or opening up a new site or retail outlet. Your learners could be required to break down the various components of a specific business operation and identify the management functions associated with each of the stages – planning, organising, coordinating and so on. At this stage of the unit, it is also important to differentiate between leadership and management. Your learners need to understand the difference between management functions, management skills and leadership traits. You could invite a member of your centre's management team to talk to learners about the different aspects of their role. They could also give examples of how they use their management skills to undertake their management functions.
- Business culture is best summarised as 'the way things are done around here'. Your learners will be able to give examples of different cultures drawn from their educational institutions and, in some cases, their work experience internships or their own workplaces. You could introduce comparative case studies of different businesses that highlight the features associated with different business cultures and encourage classroom discussions that identify the positive and negative features of business culture and their impact on individual and business performance.
- Ask learners to work in small groups to summarise their learning in this topic area.



### Topic B – Management and leadership styles and skills

- This learning aim looks at leadership and management styles, their impact on business culture and their effectiveness in dealing with workplace issues.
- Your learners should be made familiar with Likert's classification of leadership styles and their characteristics. Other classifications of management style and their characteristics should be introduced, including paternalistic leadership, charismatic leadership, transactional leadership and transformational leadership. The work of Likert can be used to introduce your learners to the different leadership styles and they could be asked to consider their preferred management style from different perspectives – an individual employee and a team leader, supervisor or manager. You should present your learners with a range of scenarios that can be used as the basis for role play. The scenarios should enable learners to identify the management style adopted by individual managers. You should then present another set of scenarios for role play in which learners are required to put forward their own management actions and identify how these actions could be characterised against the 'ideal' types. Your learners could then share their responses with their peers in order to justify their own proposed management actions and evaluate critically those of their peers.
- Using the same set of scenarios, your learners could consider the skills they would need to use in order to identify and implement their proposed actions. You should draw out from the work presented by your learners the following points:
  - There is likely to be no one management style which is applicable to all business situations.
  - Different management approaches may be applicable to one specific situation.
  - The effectiveness of any management style is directly linked to the management skills possessed by the individual manager.
  - A business' predominant management style is a key influence on business culture and its individual components.
- You could use role play to explore management and leadership skills. Give learners some scenarios and ask them to work in small groups to role-play the management and leadership skills required. You can then ask groups to feed back on what they learnt from the experience.
- Ask learners to work in small groups to summarise their learning in this topic area.

### Topic C – Managing human resources

- The management of human resources presents managers with some of their biggest challenges, since all individuals are unique and influenced by different priorities and management styles. This topic looks at the challenges faced by the manager when dealing with individuals and teams, and the strategies that can be implemented to increase the effectiveness of human resource management.
- Your learners need to be aware of the influence of both the internal and external business environments on the human resources function. Learners could identify the sources that give information on the labour market. At a local level, this may be provided by local and regional authorities, at a national level by the UK government's Office for National Statistics (ONS), and at an international level by organisations such as the European Union (EU) and the Organisation for Economic Cooperation and Development (OECD). Your learners could use data and information drawn from some of these sources to undertake secondary research to identify the factors influencing the demand and supply of labour in specific sectors of the economy. Undertaking research in this area is likely to introduce your learners to the influence of globalisation on the demand and supply of labour. Membership of the European Union and the increasing



international mobility of labour can bring both benefits and challenges to the human resources function, and learners should conduct research to identify the different strategies adopted by the human resources function in different businesses to address the issues arising out of globalisation.

- Your learners could undertake research or complete a case study of a multinational corporation (MNC) to review its approach to human resource planning and its influence on business decisions.
- You should identify with your learners the macro HR challenges arising from analysis of the business environment. This is likely to centre on aspects such as skill shortages and recruitment. These aspects will form the basis of the practical responses employed by a business to meet its requirements for a flexible workforce. A local employer could speak to your learners about these aspects of HR management and the strategies their business has employed to ensure that their requirements are satisfied. Learners could then research the ways other businesses have sought to address these recruitment issues, including zero-hours contracts, part-time workers and outsourcing, presenting their own views as to their benefits and drawbacks. Skill shortages can also be addressed by putting in place recruitment strategies to attract workers from under-represented groups such as members of ethnic communities, those with childcare responsibilities and people with disabilities. Learners should be able to identify the management actions aimed at recruiting people from under-represented groups – for example by reviewing recruitment strategies, implementing family-friendly policies or making physical adaptations to workplace accommodation.
- Learners also need to undertake activities that enable them to understand the impact of an effective human resources strategy on business performance. They should be able to identify a range of financial and non-financial performance measures and show the impact of HR management practices on the measures.
- Ask learners to work in small groups to summarise their learning in this topic area.

### **Topic D – Factors influencing management, motivation and performance of the workforce**

- Regardless of the skill level of its workforce, a business' performance will suffer if its employees lack motivation. This topic looks at the management strategies and business practices that can influence motivation and, with it, the performance of individuals, teams and the business.
- Give an overview of the main management theorists and their approach to understanding the factors that influence workplace motivation. Your learners could take each motivation theory and use a variety of case studies to identify how the theories have been translated into practice. For example, they could use Maslow's Hierarchy of Needs to find examples of the management practices implemented in different businesses to address each of the levels within the hierarchy. Learners could also analyse a number of adverts to identify some of the key criteria used by businesses to select and recruit staff and map these against the benefits identified by the individual businesses – both monetary and non-monetary. Individual learners could then prioritise those factors that would influence them to apply for different jobs. Your learners could share their responses with their peers and a class discussion could identify how different factors, both monetary and non-monetary, influence individual motivation.
- Your learners should be able to suggest appropriate workplace practices aimed at addressing each of the elements in Maslow's Hierarchy of Needs; the influence of financial and non-financial factors on the level of motivation could also be discussed from the viewpoint of individual learners in your class in order to show how different individuals have different motivational influences. You could then discuss with your learners the implications for managers of managing individuals who have different motivational influences.



- Workforce performance can also be influenced by management practices and these should be considered by your learners in a variety of contexts. Learners should be able to present the management case for outsourcing business processes and show examples of this practice. A case study involving restructuring resulting in changes to job roles and teams is a useful way for your learners to address different management challenges using knowledge drawn from a number of topics within the unit. This approach will require the learners to analyse a business scenario, evaluate the strategies that could be considered, and make recommendations to their peers who could then evaluate critically the conclusions.
- Training and development is also an important motivational influencer. Your learners will consider the role of a training needs analysis drawn from a skills audit of the workforce, and the strategies which can be implemented by a business to address their identified training needs along with their relative merits and drawbacks.
- Learners could research businesses to obtain information on the training and development opportunities available to individuals in their workforce. Your learners should be able to describe the difference between off-the-job (external) and on-the-job (internal) training, distinguishing between qualifications and skills-based training. Training and development can support a system of mentoring and coaching. Your learners should be able to distinguish the features of both mentoring and coaching and identify the benefits they bring with reference to particular businesses. One way of doing this is for you to set up a mentoring system in which your learners have the opportunity to mentor and coach learners on a level 2 Business programme. This will enable them to identify both the benefits of such practices and the skills required to give effective support.
- At some stage managers will be required to assess the performance of individuals in the workforce. Your learners should recognise the importance of a formalised performance appraisal scheme linked to financial rewards or training and development needs. You could give your learners examples of the documentation used in performance appraisal so that they can identify the features of different performance appraisal models. Your learners may be able to complete some of the sections in the documentation to complete their own self-assessment linked to their own training and development needs and future career path. The centre's Quality Nominee could work with your learners to undertake a 360 degree appraisal of the BTEC National programme as part of the centre's own quality assurance framework.
- Ask learners to work in small groups to summarise their learning in this topic area.

### Topic E – Impact of change

- Businesses that fail to respond to changes in the business environment are likely to see their performance suffer. Sales and market share may fall and with it the level of turnover and profits. This topic looks at how the business responds to its stakeholders and considers how managers and business leaders can manage the competing interests of the main stakeholder groups.
- Your learners could complete a case study that requires them to identify changes in the internal and external business environment and their impact on a specific business. Learners could analyse these factors and evaluate their impact on the business. The case study should incorporate the main stakeholders so that learners can identify the interests and influence of the various stakeholder groups. Businesses are increasingly subject to the influence of virtual online communities and you could use some examples from social media to show its impact on business and management practices. Equally, businesses are also using online communication strategies to engage with stakeholders, for example, innovative marketing strategies, customer reviews and shareholder engagement. Learners should undertake research into these strategies and analyse their impact on stakeholder engagement.
- Ask learners to work in small groups to summarise their learning in this topic area.





### Topic F – Quality management

- Businesses that place a priority on the effectiveness of their quality management systems can gain a competitive advantage over their competitors. Indeed, there are many examples of businesses who are able to charge higher prices for their products, without experiencing a fall in consumer demand, primarily because of their reputation for producing high quality goods and services. This topic looks at the features of effective quality management systems and their impact on the performance of a business.
- Learners should undertake research into quality standards so that they gain an understanding of the terminology used in quality management systems (ISO840200), the main features of total quality management (BS7850), and the characteristics of external quality kite marks (IIP). For example, quality circles require the manager to lead a group of employees to suggest improvements to business systems and processes. Your learners would need to identify the benefits of this approach and the management skills required to maximise its effectiveness.
- You could invite a member of your centre's management team to talk to your learners about your centre's approach to quality management and how it is implemented, or you could invite a specialist quality manager from a local business to talk on the same subject. If you are able to visit a manufacturing plant, learners would see first-hand the production process in action and how quality is maintained and managed.
- A member of the centre's management team with responsibility for quality and staff development and training could talk to your learners about your centre's quality framework and the involvement of staff in its implementation. Your learners could then discuss the management implications of implementing a quality management system, including staff training, costs, workforce structure, management style and business culture.
- Learners also need to be aware of the importance of quality assurance and control in manufacturing. They could gain an understanding of the application of quality in a manufacturing business by researching the principles of lean manufacturing and its application in specific industries, as well as the contribution of the Six Sigma framework to quality improvement. Your learners should also focus their research on the implications for management of implementing quality improvement systems by evaluating the results of a basic cost-benefit analysis of a quality system.
- Ask learners to work in small groups to summarise their learning in this topic area.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

Pearson BTEC Level 3 Nationals in Business (NQF):

- Unit 1: Exploring Business.
- Unit 7: Business Decision Making.
- Unit 8: Recruitment and Selection Process.
- Unit 9: Team Building in Business.
- Unit 20: Investigating Corporate Social Responsibility.
- Unit 21: Training and Development.
- Unit 24: Employment Law.

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Business. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

## Textbooks

- Boddy, D – *Management – an Introduction* (Financial Times/Prentice Hall, 2009) ISBN 9780273728566.
- Burtonshaw-Gunn, S – *The Essential Management Toolbox Tools, Models and Notes for Managers and Consultants* (J Wiley & Sons, 2008) ISBN 9780470518373.
- McGrath, J and Bates, B – *The Little Book of Big Management Theories and How to Use Them* (Pearson, 2013) ISBN 9780273785262.
- McGrath, J - *The Little Book of Big Management Questions: The 76 Most Important Questions and How to Answer Them* (Pearson, 2014) ISBN 9781292013602.

## Websites

- [www.beta.tutor2u.net/](http://www.beta.tutor2u.net/) – Contains a comprehensive set of resources for tutors of business studies including PowerPoint presentations, video clips accompanied by innovative teaching, and learning strategies.
- [www.businessballs.com](http://www.businessballs.com) – Contains a comprehensive set of resources focused upon leadership and management.
- [www.businesscasestudies.co.uk](http://www.businesscasestudies.co.uk) – Contains case studies on business organisations which cover a range of business themes including globalisation.



- [www.cipd.co.uk](http://www.cipd.co.uk) – Chartered Institute of Personal Development has a series of useful factsheets on HR-related issues.
- [www.managementstudyguide.com](http://www.managementstudyguide.com) – A complete tutorial resource for management learners.



## Unit 13: Developing an Enterprise Strategy

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### Delivery guidance

#### Approaching the unit

Have you ever considered how businesses and entrepreneurs decide when, and how to bring a new product or service to market, or when they should scale up? Entrepreneurs and businesses are often driven by their vision, mission and business purpose, which inform their actions in their drive to be successful. To survive and grow new enterprises, established businesses need to innovate and develop their products and services to maintain their competitive advantage over their competitors and profitability to keep ahead of the competition. In doing so, they need to think about many different factors, and consider how these combine to ensure the success of the product, service or scale up – they need to develop a strategy. Strategy is important to help inform the decision-making process and guide the actions and direction of the business. Before launching a new product or service or scaling up, the business will explore the market and opportunities available to ensure that the idea, product or service is viable. As they explore the market and business environment, they may need to adjust the strategy accordingly. For example, they may discover that they need to act quickly to stay ahead of the competition to take advantage of market conditions. In this unit, you will explore the feasibility and possibilities of an idea, product or service or scaling up an existing one; you will develop a strategy to establish it in the marketplace and in customers' minds.

The teaching and assessment of this unit builds on many of the areas covered in *Unit 1: Enterprise and Entrepreneurs*, *Unit 2: Developing a Marketing Campaign*, *Unit 4: Launch and Run an Enterprise*, *Unit 5: Survival and Growth*, *Unit 8: Entrepreneurship and Intrapreneurship in Practice* and *Unit 9: Innovation Enterprise*, including the external factors that affect business enterprises, the key functions of business (finance, marketing, production/operations and human resources), and their relevance to an enterprise activity.

Learners will look at what an enterprise strategy is and factors that make one viable. They will be able to identify any constraints, which may affect the success of an enterprise and consider how to overcome these. Learners will be encouraged to generate their own innovative ideas for an enterprise, which if deemed viable, will form the basis for the rest of this unit. Learners may draw upon the enterprise idea developed in Unit 4 – however, this is not a prerequisite for Unit 13. The learner may develop an idea that is considered to be viable, or learners can use an existing enterprise idea and consider how it would be scaled up. Learners are required to develop an enterprise strategy for the enterprise idea, product or service by looking at the internal and external environment and the marketplace in which it will or does operate – learners are not required to trade.

The unit encourages learners to work collaboratively and will enhance their communication, presentation, team-working and negotiation skills. It also develops time management and project planning skills, skills that will help learners relate what they are learning in the classroom to the real world of work. Learners will have the opportunity to investigate different roles and tasks involved when developing an enterprise strategy, encouraging them to gain an understanding of working towards both team objectives and to appreciate the management of individual areas of personal responsibility. Although activities may be team based, it is the learner's individual work that will be assessed. It is



therefore important that each learner is aware of how each separate component contributes to the overall success or the overall failure of the enterprise strategy.

## **Delivering the learning aims**

### **Learning aim A**

For learning aim A (Create the vision for an enterprise idea), the topic can be introduced by looking into the sources of entrepreneurial ideas. How do enterprises develop their portfolio of products and services? How do they keep ahead of the competition and develop an enterprise idea or scale up? Any enterprise development needs to take place so that it reflects the enterprise's mission, vision and business objectives: for example, profit, and market share or ethical behaviours, as well as having a fit with the values and culture of the enterprise. As a starter task, learners can initially explore enterprise ideas through the use of research, case studies and a guest speaker; learners can select an enterprise idea and identify the potential reasons for its success. Set a task for learners to research a local enterprise, perhaps through a visit, and prepare a case study highlighting the vision and mission of the enterprise, how they develop and formulate new enterprise ideas, and how they decide to develop new products or services and bring them to market. This will lead to learners gaining an understanding of what cultures and values are, and how these might influence the objectives of the enterprise and their strategy. Look back at the previous units learners have covered, in particular Unit 4, to help learners develop their own enterprise idea – they could use or adapt one of the ideas they have already worked on. Alternatively, they can develop an entirely new enterprise idea, or scale up an existing enterprise idea.

### **Learning aim B**

For learning aim B (Examine the environment and market opportunities in which the enterprise will operate), you can begin by helping learners to gain an understanding of the external and internal environment. You will need to demonstrate to learners what a PESTLE analysis is and how the different elements will affect the market in which an enterprise will operate. Give learners examples from real enterprises that they can complete their own PESTLE analyses for. In addition, you will discuss what type of enterprise culture learners would want to create and why for their enterprise. Learners can apply their knowledge and understanding from Unit 2 to establish how enterprises undertake market research to establish if a new product or idea is feasible, given their chosen market, and its segmentation. Learners can also use models such as 5Cs or Porter's Five Forces to help carry out the situational analysis and analyse possible competitors within their chosen sector for their enterprise. Learners can further explore these themes through the input from a speaker from a local enterprise who will be able to discuss the internal and external environment in relation to their enterprise and how this affects and informs their enterprise strategy and actions. In addition, they can discuss how they identify market opportunities and take advantage of these through its approach to marketing and its target markets, which contribute to the success of the enterprise as they scale up or launch new products or services.

### **Learning aim C**

For learning aim C (Design an integrated, scalable strategy for the enterprise), learners can use case studies showing the development of enterprise strategies and the use of subsidiary strategies in support of the main strategy. As an introductory task, it is important that learners understand what we mean by strategy. You will need to demonstrate to learners types of enterprise strategy, for example, Porter's Generic Strategies and Ansoff Matrix and consider how enterprises can use these models to help



inform what their strategy could be. Learners could be split into groups and be asked to investigate an enterprise and then present back with the focus being on how the enterprise has scaled its operations from entry into the market to scaling up. Examples might include Netflix, Virgin, UBER, Addison Lee, Innocent Drinks, Gandys Flip Flops, Pret A Manger and Brompton Bicycles. Having studied an enterprise, learners should prepare and deliver presentations with professionally presented slides and speaker notes on developing enterprise strategies and subsidiary strategies, outlining a possible enterprise idea. You could also invite guest speakers from local enterprises to talk about developing enterprise strategies and how they select their strategy to inform type and scale of an enterprise. They should also place an additional focus on the enterprise stakeholders, financials and their influence on the aims and objectives. Encourage your learners to ask appropriate questions, and ask them to prepare suitable questions prior to the speaker's arrival. This should ensure that learners are getting the most out of this activity.

### **Learning aim D**

For learning aim D (Review the feasibility of the enterprise strategy), you can begin by reviewing the enterprise strategy by looking at appropriate models, which can be used to support this analysis: for example, Johnson and Scholes and Whittington. This could be done by learners assessing the 'success' of the enterprise ideas studied and presented in learning aim C through evaluating the benefits and risks associated with the enterprise strategy and idea. Reflecting on feasibility is a skilled task and therefore learners must be able to identify the key areas to review and understand how they could assess the feasibility of the enterprise strategy effectively to draw appropriate conclusions.



**Assessment model**

<b>Learning aim</b>	<b>Key content areas</b>	<b>Recommended assessment approach</b>
<b>A</b> Create the vision for an enterprise idea	<b>A1</b> Enterprise ideas <b>A2</b> Vision and mission <b>A3</b> Culture and values <b>A4</b> Objectives	A report that examines the effects of the internal, external and competitive environment on an enterprise, showing how the enterprise will respond and adapt to its environment and how it sets the overall vision, mission and objectives for the enterprise
<b>B</b> Examine the environment and market opportunities in which the enterprise will operate	<b>B1</b> External environment <b>B2</b> Internal environment <b>B3</b> Competitive environment <b>B4</b> Situational analysis <b>B5</b> Market research <b>B6</b> Market planning <b>B7</b> Marketing <b>B8</b> Complementary marketing activities	
<b>C</b> Design an integrated, scalable strategy for the enterprise	<b>C1</b> Enterprise strategies <b>C2</b> Developing an enterprise strategy <b>C3</b> Developing subsidiary strategies to support the enterprise strategy <b>C4</b> Selecting the type and scale of an enterprise <b>C5</b> Aims and objectives <b>C6</b> Scaling up	A presentation of a scalable enterprise strategy, based on an assessment of the available market opportunities, to establish the presence of an enterprise in its chosen markets and review its potential feasibility/success Appropriate information needs to be provided to support the presentation.
<b>D</b> Review the feasibility of the enterprise strategy	<b>D1</b> Reviewing the enterprise strategy <b>D2</b> Benefits and risks associated with the enterprise strategy <b>D3</b> Review conclusions	A detailed plan of the enterprise strategy, which identifies the benefits, risks and feasibility



## Assessment guidance

This unit is internally assessed through a number of independent tasks. Each task should cover at least one entire learning aim and it is essential that a learning aim is assessed as a whole and not split into tasks or sub-tasks per criterion.

There is a maximum number of three summative assignments for this unit. The relationship of the learning aims and criteria is:

- Learning aims: A and B (A.P1, B.P2, B.P3, B.P4, B.P5, A.M1, B.M2, AB.D1)
- Learning aim: C (C.P6, C.P7, C.M3, C.D2)
- Learning aim: D (D.P8, D.M4, D.D3).

All learners must independently generate individual evidence that can be authenticated.

The main sources of evidence are likely to be written reports, or articles for a journal.

Learners should incorporate in-depth research that is corroborated by a fully referenced bibliography.

Learners could also produce presentations. Suitable forms of evidence for a presentation include slides, preparation notes, script, cue cards, peer assessment records and an observation record. BTEC assessors can complete observation records and learners' colleagues in placements or part-time work could complete witness statements.

Observation records alone are not sufficient sources of learner evidence; the original learner-generated evidence must also support them. Assessors should remember that they are assessing the content of the presentation against the learning aim and not the skill with which the presentation was delivered.





## Getting started

**This provides you with a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.**

### Unit 13: Developing an Enterprise Strategy

#### Introduction

Begin by introducing the unit to learners through a group discussion exploring what they know about 'Enterprise ideas'. Outlining the learning aims of the unit can follow this. Look back at the units learners have covered so far, in particular Unit 4, and ask learners to consider whether the idea they have already developed is one that they want to take further. If it is not an idea they wish to take further, learners will need to study an enterprise and consider a possible new product, service or idea they could take forward to develop an enterprise strategy for it. The enterprise idea can also be an existing enterprise, which they wish to scale up and develop a strategy for.

#### Learning aim A – Create the vision for an enterprise idea

- Lead a discussion on the question, 'What is an enterprise idea?' Give learners examples such as Virgin, Netflix, UBER, Addison Lee, Brompton Bikes, Gandys Flip Flops, Innocent Drinks, the Eden Project, the Big Issue or Fifteen. Ask learners to carry out internet research to find out where the ideas for these enterprises came from and share this with the group.
- Ask learners, in pairs, to deliver a presentation on how and why an enterprise idea can be behind a number of enterprises.
- Enlist the help of a visiting speaker, e.g. someone from a local enterprise or Speakers for Schools, to talk about the generation of ideas in their enterprise, how they are formulated, and taken from inception to implementation. How do they decide when to launch a product service or idea or scale up? How do they measure success? What do they do if an idea does not progress as expected?
- Ask learners to research a local enterprise, perhaps through a visit and by inviting a guest speaker from a local enterprise, and prepare a case study highlighting the vision and mission of the enterprise. Ask learners to consider how and why an enterprise idea could develop into a successful enterprise, and how their vision and mission may influence this.
- Give an overview of what makes an enterprise successful.
- Ask learners to research the different types of culture that exist at a number of enterprises, looking back at businesses covered in units they have previously studied and defining the culture in those businesses. As a group, look at the values of those businesses and ask learners to discuss how culture and values work together and how this supports and influences the development of an enterprise idea.
- Ask learners to research a number of enterprises to establish what their purpose and objectives are.
- Ask learners to think about and research how businesses and entrepreneurs decide when, and how to bring a product or service to market. How they decide what the next big thing will be and how they establish what the gap in the market might be for the enterprise idea?
- Ask learners to research how SMART objectives are set and what their purpose is, and to consider these in light of an enterprise idea the enterprise might develop. In developing the idea, learners need to consider how the different elements combine to influence the type and nature of the enterprise idea, product and/or service. As an example, an enterprise in the retail sector with a mission statement and focus



based on ethical practices would ensure any new enterprise product continued to fulfil these objectives and values. Learners need to be clear with regard to their chosen enterprise idea, product or service, as this will be used as the key element that the enterprise strategy will be developed for.

### **Learning aim B – Examine the environment and market opportunities in which the enterprise will operate**

- As a group, discuss the different external and internal environmental factors that an enterprise operates in, using case studies and examples put forward by learners or these could be taken forward from learning aim A.
- Ask learners to investigate a number of different enterprises and to state what type of culture they have: whether it is entrepreneurial, task, role, power or person orientated. Learners should investigate how the enterprise's values and ethical principles may guide the way the enterprise operates and may also influence the development of enterprise ideas within the business.
- In small groups, ask learners to explain what the competitive environment is and how it influences the chances of success of an enterprise, its new products, services and ideas. Learners could use various techniques, possibly PESTLE, SWOT, 5Cs and/or Porter's Five Forces to help in their assessment to aid their situational analysis.
- Lead a discussion on the question, 'Which factor influencing competitive advantage is the most crucial to lead to the success of an enterprise, and why?' Use examples from Unit 5 to provide case studies for learners to research.
- Give learners an overview of and revisit the marketing mix. Ask learners to consider the question 'How can businesses use the marketing mix to help them develop an enterprise idea?'
- Lead a discussion on the question, 'Why do you think that market research would be useful to a business in developing a new enterprise idea, product or service?'
- Give learners some examples of key content from a number of successful campaigns used by business to launch or promote an enterprise idea. Discuss what each campaign aims to achieve (e.g. brand awareness, lead generation or conversion, loyalty or upselling). Ask learners to consider whether the message is clear or cluttered, and whether the campaign is creative and/or memorable.
- Ask learners to consider what market research may have been undertaken and utilised by the enterprise in relation to the marketing campaign, i.e. primary, secondary, analysing buyer behaviour and influences, and establish who the target markets are.
- Introduce market planning. Consider how would the findings from market research influence the development of an enterprise idea and help the business inform their product planning and market development. Ask learners to select the most appropriate reason for selecting a target market, with justification.
- Ask learners to review either the examples of campaigns that you have provided in previous units, in particular Unit 11 and Unit 2, or examples that they have found in their own research, and evaluate their effectiveness. They should consider marketing objectives, budgetary allocations, and choice of techniques and impact of competitor behaviour.
- Introduce complementary marketing activities. If possible, arrange to have a guest speaker from a local business or an entrepreneur who can explain how they use different marketing techniques and research in practice to help them make customers aware of their products and services. Ask them to cover what complementary marketing activities they utilise and which work best? And why? How do they assess their effectiveness?

**Learning aim C – Design an integrated, scalable strategy for the enterprise**

- Deliver a presentation on enterprise strategies, covering what an enterprise strategy is and how models can be applied, such as Porter's Generic Strategies and Ansoff Matrix. Give an overview of how these models can be used by an enterprise to help them formulate their strategy as they develop products or services for an enterprise idea or scale up.
- Enlist the help of a visiting speaker, e.g. someone from a local enterprise or Speakers for Schools, to talk about enterprise strategies they use in their business, both an integrated scalable strategy and also what subsidiary strategies they use and employ to support the enterprise. Which strategies do they find to be most effective and why?
- Ask learners to carry out research to find out about enterprises. These can be chosen by you or they may choose their own.
- Ask learners to investigate the purpose of an enterprise strategy and to carry out research into a number of enterprises to identify how the strategy employed may be influenced by culture, values, mission and objectives of the enterprise. How is a new product, service or idea strategy formed? For example, is it top down or traditional; Strategic position analysis; Emergent strategy or incrementalism?
- Ask learners to consider what other factors need to be taken into account by an enterprise when developing a strategy, i.e. financial strategy, marketing strategy, sales and distribution strategy, buying strategy and other subsidiary strategies – human resources, operations and information technology. Split learners into groups and ask them to research each of the subsidiary strategies listed and present their findings back to the group.
- Give learners a case study of an enterprise idea and ask them to analyse and assess how all the different elements can combine to ensure the enterprise is successful. In contrast, give them an example of an enterprise idea, which was not successful and considered a failure, e.g. recent products developed in the mobile phone market. Learners should aim to provide an actual case study, which relates to a particular enterprise and their success or failure.
- Lead the discussion, 'When it comes to starting an enterprise, is bigger always better?'
- With examples, demonstrate the factors determining type and scale of an enterprise and what measures can be used to assess if they have been successful or not.
- Ask learners to research all of the stakeholders and detail what their interests are in the enterprise and what their influence on the success of the enterprise is.
- Explain what aims and objectives are and how they might differ between private and public enterprises.

**Learning aim D – Review the feasibility of the enterprise strategy**

- Ask learners to research Johnson and Scholes and Whittington's strategy evaluation. Ask learners to apply their findings to the case study they investigated in learning aim C.
- Ask learners to research what the key performance indicators would be for reviewing the enterprise strategy. What are the measures for success?
- Ask learners to use the internet to research the benefits of an enterprise strategy.
- Ask learners to use the internet to research the risks of an enterprise strategy.
- Learners will be required to use the command word 'evaluate', to recommend and justify why the strategy will be successful in the short, medium and long term.



- Explain how the success of the implementation of an enterprise strategy is measured.
- Ask learners to create an informational leaflet explaining how the perception of an enterprise strategy changed in respect of its components from inception to implementation.
- Explain what the benefits associated with the enterprise strategy are. What the recommendations are? What conclusions can be drawn in relation to the enterprise, from the learners' investigation of an enterprise idea and its associated strategy.



## Details of links to other BTEC units and qualifications, and to other relevant units/qualifications

- Unit 1: Enterprise and Entrepreneurs
- Unit 2: Developing a Marketing Campaign
- Unit 4: Launch and Run an Enterprise
- Unit 5: Survival and Growth
- Unit 8: Entrepreneurship and Intrapreneurship in Practice
- Unit 9: Innovation and Enterprises

## Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC Nationals in Enterprise and Entrepreneurship. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

### Journals

*Business Review* (Philip Allan Magazines) – a journal designed for Business Studies learners that include relevant theoretical articles, as well as information on companies and markets

*The Economist* – The Economist print edition is a weekly economics and business journal that has regular articles and features about issues related to public sector businesses and the economy. It has an extensive archive of relevant materials.

### Videos

TEDEd offers a variety of relevant education videos (<http://ed.ted.com>).

TED offers online videos of short, powerful talks (18 minutes or less) covering almost all topics ([www.ted.com](http://www.ted.com)).

This *YouTube* link gives business ideas and trends from Entrepreneur Magazine and Entrepreneur Network partners. The site offers the latest news, expert advice and growth strategies for small business owners ([www.youtube.com/user/EntrepreneurOnline](http://www.youtube.com/user/EntrepreneurOnline)).

### Podcasts

[www.thebusinesspodcast.co.uk](http://www.thebusinesspodcast.co.uk) – The Business Podcast is a weekly podcast to all tutors and pupils on current business topics using contemporary, relevant online newspaper articles. Subscription is free.

### Websites

[www.bbc.co.uk/news/business/economy](http://www.bbc.co.uk/news/business/economy) – The BBC provides news on the UK economy.

[www.businesscasestudies.co.uk](http://www.businesscasestudies.co.uk) – The Times 100 has economics and business case studies. The site also has a selection of theory notes aimed at learners.

[www.bvca.co.uk](http://www.bvca.co.uk) – Website for lenders of equity and venture capital

[www.cnbc.com/2015/09/19/10-oddball-us-inventions-that-reaped-millions.html](http://www.cnbc.com/2015/09/19/10-oddball-us-inventions-that-reaped-millions.html) – Quirky ideas that reaped millions such as the 'pet rock'

[www.crowdfunder.co.uk](http://www.crowdfunder.co.uk) – Website for crowd funding

[www.deborahmeaden.com](http://www.deborahmeaden.com) – Deborah Meaden's website with examples of projects funded

[www.economist.com](http://www.economist.com) – The Economist online has an archive of articles about the UK economy. A subscription is required, but it also includes the weekly editions of the newspaper.



<http://ed.ted.com> – TEDEd has a growing library of lessons and educational videos.

[www.enterprise.ac.uk/index.php/case-studies](http://www.enterprise.ac.uk/index.php/case-studies) – Enterprise Educators UK is the national network for enterprise educators. Members post case studies that demonstrate the impact of their enterprise and entrepreneurship education.

[www.entrepreneur.com](http://www.entrepreneur.com) – Entrepreneur magazine online. Also available as an app in iTunes – <https://itunes.apple.com/us/app/entrepreneur-magazine/id466584564?mt=8>

[www.entrepreneur.com/article/200730](http://www.entrepreneur.com/article/200730) – 25 common characteristics of successful entrepreneurs

[www.gew.co](http://www.gew.co) – Website for Global Entrepreneurship Week – the world’s largest celebration of the innovators and job creators who launch start-ups that bring ideas to life, drive economic growth and expand human welfare

[www.gov.uk/business-finance-support-finder](http://www.gov.uk/business-finance-support-finder) – Government website to help businesses find financial support

[www.gov.uk/starting-up-a-business/get-funding](http://www.gov.uk/starting-up-a-business/get-funding) – Government funding website

[www.innocentfoundation.org](http://www.innocentfoundation.org) – Website for the Innocent Foundation

[www.kickstarter.com](http://www.kickstarter.com) – Crowdfunding website

[www.mindtools.com/CommSkill/WritingSkills.htm](http://www.mindtools.com/CommSkill/WritingSkills.htm) – Tips on how to develop good communication skills

[www.onlinebusinessschool.net/10-wealthiest-entrepreneurs-of-all-time](http://www.onlinebusinessschool.net/10-wealthiest-entrepreneurs-of-all-time) – Wealthiest entrepreneurs of all time

[www.oxonbe.co.uk](http://www.oxonbe.co.uk) – Example of local information for would-be entrepreneurs

[www.pjea.org.uk](http://www.pjea.org.uk) – Information on The Peter Jones Academy with links to case studies and examples

[www.slideshare.net](http://www.slideshare.net) – SlideShare has a number of resources to include coverage of entrepreneurship.

[www.speakers4schools.org](http://www.speakers4schools.org) – Speakers for Schools is a UK charity that provides state secondary schools and colleges with talks from a range of industry leading professionals, public figures and academics, free of charge.

[www.tes.com](http://www.tes.com) – TES online has a variety of free teaching resources.

[www.tutor2U.com](http://www.tutor2U.com) – This site provides resources and revision materials. There are also links to other sources of information – <http://www.tutor2u.net/business/reference/what-is-strategy>

[www.ukbusinessangelsassociation.org.uk](http://www.ukbusinessangelsassociation.org.uk) – Website for the Business Angels Association

[www.young-enterprise.org.uk/](http://www.young-enterprise.org.uk/) – UK charity that aims to empower young people to harness their personal and business skills.

[www.zopa.com](http://www.zopa.com) – Peer-to-peer lending site

*Pearson is not responsible for the content of any external internet sites. It is essential for tutors to preview each website before using it in class so as to ensure that the URL is still accurate, relevant and appropriate. We suggest that tutors bookmark useful websites and consider enabling learners to access them through the school/college intranet.*