

<b>Unit Title:</b>	<b>Negotiate on behalf of advice and guidance clients</b>
OCR unit number	13
Unit sector reference	AG11
Level:	5
Credit value:	5
Guided learning hours:	35

## Unit purpose and aim

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To show the ability to work with the client and then negotiate with other parties on behalf of the client.

Learning Outcomes	Assessment Criteria
<p><b>The Learner will:</b></p> <p>1 Understand the main points of negotiation</p>	<p><b>The Learner can:</b></p> <p>1.1 Explain the types of negotiation strategies suitable for different types of issue</p> <p>1.2 Explain what different formats of negotiation can be used</p> <p>1.3 Explain what supporting documentation might be required</p>
<p>2 Be able to prepare offers that meet the client's requirements</p>	<p>2.1 Review the client's requirements</p> <p>2.2 Identify a negotiation strategy suitable for the client's requirements</p> <p>2.3 Prepare suitable offers for clients that meet their requirements</p>
<p>3 Be able to explain offers received from other parties</p>	<p>3.1 Receive offers from other parties</p> <p>3.2 Consult with the clients to assess how far the offers meet requirements</p> <p>3.3 Recommend the next stage in the negotiations</p>
<p>4 Be able to establish an agreement for clients</p>	<p>4.1 Produce agreements that effectively meet the client's requirements and are in the required format.</p> <p>4.2 Incorporate all necessary details into the agreement and ensure it is capable of being implemented</p> <p>4.3 Confirm agreements with clients at appropriate stages of the negotiations</p> <p>4.4 Advise the clients why any requirements cannot be met or if there are any significant changes to the agreement.</p>

## Assessment

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This qualification is internally assessed by centre staff and externally verified by an OCR Assessor.

## Evidence requirements

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Simulation is not allowed for any part of this unit.

All evidence of your performance must be generated in your workplace, in accordance with organisational procedures and national, local and professional guidelines.

Prior to commencing this unit you should agree and complete an assessment plan with your assessor which details the assessment methods you will be using and the tasks you will be undertaking to demonstrate your competence.

You must provide your assessor with evidence for all of the assessment criteria for each learning outcome. Your assessor must be satisfied that you are able to undertake your work activities consistently over a period of time.

It is up to your assessor, working with the guidance provided, to determine a suitable mix of assessment methods, and to decide on the amount and type of evidence that is required to judge your competence.

The preferred assessment methods to be used for this unit are:

**Direct observation of performance:** Observation of you undertaking real work activities. This could involve interacting with clients or providing information to clients.

**Evaluation of work products:** Any item generated from real work activities. Evidence could be from different locations and from a variety of sources. This could include case notes, records and correspondence. It is not required in your portfolio and can remain where it is normally stored. The location and relevance of the evidence must be indicated in your portfolio. The evidence must be available for assessment and verification.

**Questioning:** Questions to ensure that you are able to apply your knowledge to your performance in the real work place. This may be used for areas not observed or evidenced through work products. This may be oral or written but evidence of the questioning must be recorded in an appropriate format. In addition your assessor may ask questions to clarify aspects of your practice.

**Witness testimony:** A confirmation or authentication of activities described in your evidence which your assessor has not seen. This could include a report or statement from a line manager or other appropriate person.

**Professional discussion:** A structured discussion with your assessor, about your performance of specific activities and a reflection on the reasons why you practised that way. The key aspects of this discussion will be recorded in a suitable format as evidence in your portfolio.

## National Occupational Standards (NOS) mapping/signposting

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This unit is derived from the National Occupational Standards in Advice and Guidance 2006 (Lifelong Learning UK).

NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at [www.ukstandards.co.uk](http://www.ukstandards.co.uk).