

Junior Management Consultant Assessment Plan

1. Introduction

This apprenticeship is designed as an entry level role into the Management Consulting profession.

Employers who are likely to use this standard are:

- professional services firms, small and medium sized generalist consulting organisations, as well as boutique consultancies from a range of areas (engineering, HR, education etc.),
- strategy houses, and
- internal management consulting services.

The principles driving the design of the Assessment Plan are that it:

- adds value to both the apprentice and the employer,
- widens access to the profession,
- positions the apprenticeship as the starting point for a career in the profession,
- provides assessment methods that are relevant and consistent, and
- is affordable in terms of both expenditure and management time, and proportionate to employers of all sizes and those with a small number of apprentices.

The approach to assessment is based on the employers' requirement that apprentices:

- a) are able to perform their role within their occupation to a high standard on completion, and
- b) make continuous progress towards this goal throughout the apprenticeship.

The assessment plan includes two distinct elements:

- a) on-programme assessment, an important part of the learning process designed to give apprentices regular formative feedback on their progress, and
- b) end-point assessment, the final summative assessment which determines whether the apprentice has met the Standard

2. Overview of assessment

2.1 On-programme assessment

Apprentices are recommended to maintain evidence of their work, via a reflective journal and folder of evidence, over the on-programme learning stage.

It is also recommended that employers carry out quarterly progress reviews to allow apprentices to reflect on their progress to date, highlight areas of strength and target areas for improvement.

The employer will decide when apprentices are ready to pass from learning and on-programme assessment into the end-point assessment phase. This decision point is referred to as the gateway.

2.2 End-point assessment

The final end-point assessment will comprise of two components and involve an independent assessor from the Skills Funding Agency's Register of Apprentice Assessment Organisations. If possible, it should take place at the employer's premises. If the employer's location is considered too remote for an assessor to travel to, technology (such as video conferencing) should be used instead. **Both components of the final end-point assessment must be passed for the apprentice to be deemed competent.** The two components are:

a) a **reflective portfolio** that demonstrates competence in the knowledge, skills and behaviours demonstrated in the standard. The portfolio will contain evidence with supporting commentary, in which the apprentice considers and discusses the extent to which they have satisfactorily met the criteria ('pass') or exceeded it ('distinction'). More detail is provided in section 5 'End-point assessment' on grading criteria; and

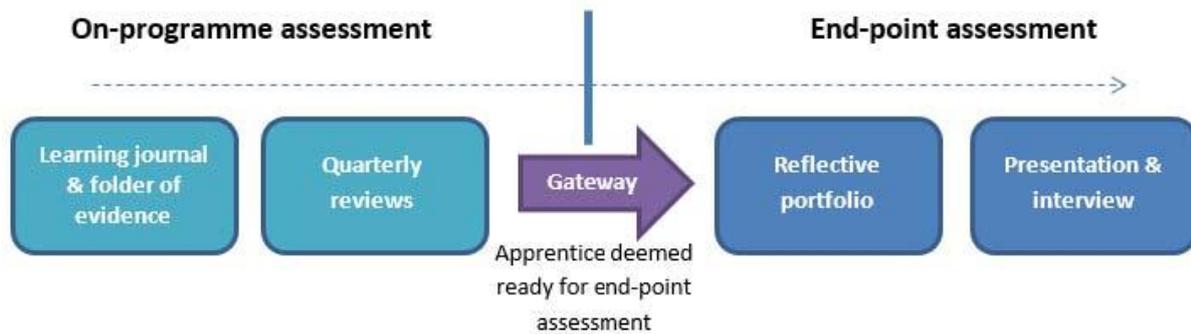
b) a **presentation and interview**. The presentation allows the apprentice to explain in detail the evidence that has been presented in their portfolio, giving them the chance to elaborate on it as well as demonstrate their communication skills. The interview will allow the independent assessor(s) to further establish that the apprentice has met the requirements of the apprenticeship standard, exploring in more details aspects of their portfolio or presentation that are of interest.

2.3 Client confidentiality

As apprentices are likely to be involved in client work, it will be important that any potentially sensitive information (such as a client name) is removed from evidence submitted during both the on-programme and end-point assessments. This is required of all management consultants and should be a skill that apprentices develop with guidance from employers and training providers since it forms part of the "behavioural" aspect of the standard. However, it is important that all stakeholders involved in the apprentice's development are aware of the need for confidentiality and actively encourage it, drawing attention to any instances where it is not being upheld.

3. Illustration of our assessment plan

An overview of our assessment plan is illustrated in the following diagram and then further described.



Apprentice carries out work as defined by their employer maintaining a reflective journal and folder of evidence, selects evidence for their showcase from work carried out towards the end of the apprenticeship and takes part in quarterly reviews.

Employer / training provider creates opportunities for the apprentice to carry out work and produce outcomes, conducts progress reviews, and confirms the apprentice is ready for end-point assessment.

Work-based assessor reviews the apprentice's progress and provides interim feedback for both the apprentice and employer

Apprentice creates and submits a portfolio, gives a presentation and attends interview. If the portfolio does not meet criteria for at least a Pass the whole end-point assessment will be deemed a fail.

Employer / training provider brings a view of the apprentice to the end-point assessment and attends the final panel.

Independent assessor assess and grade the apprentice on the basis of the reflective portfolio, presentation and interview. Chairs the final panel and makes the ultimate decision.

4. On-programme assessment

The Apprenticeship will typically take 2 years to complete, but an apprentice is unlikely to be in a position to undertake the end-point assessment before they have completed 18 months. A robust process of on-programme assessment will ensure that apprentices make good progress towards the final end-point assessment.

Whilst not mandatory, recommendations for on-programme assessment are made below:

- Apprentices keep a reflective log and gather evidence against each of the competencies illustrating the application of knowledge, skills and behaviours. Whilst any evidence that is assessed during the on-programme period of the apprenticeship cannot be used for the end-point assessment, gathering it will encourage the apprentice to continuously reflect on their

learning and development. Any evidence that is not assessed during this period may be used for the end-point assessment.

- Apprentices are encouraged to develop and maintain examples of their work throughout their apprenticeship, these may be used as part of the end-point assessment providing they are not assessed during on-programme training. This work can then be used to demonstrate how they have applied their learning and developed over time.
- Employers review the progress of their apprentices every 3 months. This can be done in the form of a quarterly review where the apprentice speaks about what they have learned, how they are developing and how they are performing. The employer may act as a mentor in these instances, providing balanced strengths and development-based feedback.
- Where the employer is unable to offer the above provision they may appoint a training provider from the Skills Funding Agency's Register of approved training providers. For instance, they may decide to enlist work-based assessors to support the quarterly reviews with the apprentice.
- A work-based assessor(s) could be involved in reviewing the apprentice's progress and provide interim feedback so that both the apprentice and employer understand which aspects of the standard need more attention and which are currently being satisfactorily met.
- Employers may decide to provide training 'in-house' i.e. by using their own L&D or performance management facilities in addition to, or instead of, training offered by training providers.
- The decision as to when the apprentices are ready to pass through the gateway from learning and on-programme assessment into the end-point assessment phase will be made by the employer and the training provider. Apprentices are required to have obtained level 2 equivalents in both maths and English in order to pass the gateway.

5. End-point assessment

5.1. Assessment approach

The end-point assessment requires apprentices to demonstrate competence across the standard. A blend of two assessment methods are therefore required. The independent assessor(s) should look to assess holistically to ascertain overall competence – for instance, by testing knowledge and skills together.

The end-point assessment uses two assessment methods:

- 1) **A reflective portfolio** through which the apprentice demonstrates competence of the knowledge, skills and behaviours set out in the standard. The apprentice may choose to consider the extent to which they have satisfactorily met the criteria ('pass') or exceeded it ('distinction'). This high level criteria has been developed in Section 9 and it will be the responsibility of the end point assessment organisation to develop the detailed criteria and ensure consistency in application as well as making them freely available on their website. Once developed, employers and apprentices can use them to gauge apprentices' progress.

It is expected that the apprentice should reflect in detail on five work situations carried out in the last 3 months of their apprenticeship and demonstrate what they did, how they did it

and why they acted as they did, together with what they have learned and what they would do differently next time.

The five work situations selected for the reflective portfolio should cover the following areas of the apprenticeship standard:

- 1x knowledge
- 1x skills
- 1x behaviours
- 2x covering either knowledge, skills, behaviours or a combination of the three

The reflective portfolio should contain evidence of the work apprentices have completed and a write up of each piece of evidence, demonstrating how it shows they have met or exceeded the criteria. It is the apprentice's responsibility to ensure that the evidence they present covers the knowledge, skills and behaviours outlined in the standard.

The reflective portfolio should be submitted to a registered Assessment Organisation on the Skills Funding Agency's Register of Apprentice Assessment Organisations for assessment at least a week prior to the second stage of the end-point assessment. The completed portfolio will be assessed by an independent assessor(s) who will make their own judgements on the quality of the work based on their personal expertise, the high-level assessment criteria, the occupational profile (provided in the annex to this document) and exemplar assessment material.

Employers will be asked to confirm that the portfolio provides an accurate representation of the work carried out by the apprentice and is not embellished.

If the portfolio in its entirety **does not** contain sufficient evidence to meet the standard then the candidate will be deemed to have **not yet met the standard** and the presentation and interview **will not** take place. Again, it is the independent assessor(s) who will have the final decision.

Where there is more than one independent assessor present at the end-point assessment the independent assessor acting as chair will make the final decision.

2) **A presentation and interview** between the apprentice and a panel to further establish that they have met the requirements of the apprenticeship standard. Importantly, this second stage of the end-point assessment will not take place if the reflective portfolio is deemed to be a 'fail'.

The panel will consist of a minimum of two members: the employer and the independent assessor. This could also include the training provider, or other stakeholders in the assessment process, but the independent assessor acting as chair will make any final judgement. The roles and responsibilities of the individuals sitting on the panel are outlined in section 5.2 below.

The presentation should focus on the evidence that was used in the portfolio allowing the apprentice to further elaborate on the commentary provided. As well as this, the apprentice

should attempt to summarise their experience as a whole and reflect on what they have learned. The focus throughout should be on demonstrating that they have met the apprenticeship standard. The presentation should last approximately 20 minutes and can be delivered in a manner that the apprentice chooses.

The interview is a structured discussion between the apprentice and the panel, using a set of criteria and a set of typical questions developed by the assessment organisation. It should focus on the reflective portfolio and presentation and how the apprentice has performed during the apprenticeship. It should last approximately 40 minutes.

This enables the assessment to cover a broad range of knowledge and understanding, skills and behaviours, such as, but not limited to the following themes (for the full range see the Junior Management Consultant Standard):

- business and commercial understanding,
- personal and project management,
- communication skills, and
- professionalism and adaptability.

The purpose of the presentation and interview is to:

- test any gaps identified in the first phase of assessment and seek clarification of any questions the independent assessor has from their assessment of the reflective portfolio and presentation
- confirm and validate judgements on how the apprentice has met the knowledge, skills and behaviours for the standard
- explore aspects of the apprentice's work, including how it was carried out, in more detail
- provide a basis for the independent assessor and panel to make a holistic decision about the grade to be awarded.

The final decision will be made by the panel. In coming to their final judgment, the panel should review all of the evidence they have gathered and follow the guidelines set out in this assessment plan.

The two proposed assessment methods will allow the apprentice opportunity to demonstrate the knowledge, skills and behaviours that they have learned during their apprenticeship as well as provide the independent assessor(s) with opportunity to judge whether or not the apprentice has met the apprenticeship standard. The reflective portfolio assesses the breadth of the standard and provides the apprentice the chance to demonstrate their ability to communicate clearly in writing. The presentation will give the apprentice an opportunity to further explore the elements of the standard they believe they have met during their apprenticeship as well as demonstrate their ability to communicate verbally. The interview will provide the independent assessor(s) with a chance to assess any knowledge, skills or behaviours that were not demonstrated by the apprentice's portfolio and presentation or that require further exploration.

A list of possible outcomes to demonstrate understanding and ability in each of the competency elements (knowledge, skills and behaviours) can be found in the occupational profile attached as an

annex to this document. The list is not exhaustive, but it is intended to provide all parties with an idea of what employers and independent assessor(s) can expect of their apprentice(s).

5.2. Roles and responsibilities

There will be a minimum of two parties involved in the end-point assessment: the employer and independent assessor(s). It is important to note however, that a final decision regarding grading and judgment are made solely by the independent assessor(s). The roles are as follows:

| Assessor | Role |
|-------------------------------------|---|
| Employer / training provider | Brings a view of the apprentice from the perspective of <ul style="list-style-type: none"> • Supporting them through the apprenticeship. • Helping them reflect on their performance throughout the on-programme assessment. • Having an understanding of their performance throughout their apprenticeship and their potential to perform beyond it. • Ensuring the apprentice is responsible for collating their portfolio and preparing their presentation in preparation for the end point assessment • Deciding when the apprentice passes the gateway • Sits on the final end-point assessment panel |
| Independent assessor(s) | <ul style="list-style-type: none"> • Review the reflective portfolio independently and scores against the assessment criteria. The assessor of the portfolio cannot be the same assessor as the chair of the panel. • Conduct the interview. • Determine the grade to be awarded to the apprentice. • Chair the final end-point assessment panel providing brings a completely independent view to the end-point assessment as they have had no prior engagement with the apprentice. |
| Assessment Organisation | <ul style="list-style-type: none"> • Registered on Skills Funding Agency Register. • Appoints and trains independent assessors. • Demonstrates effective quality assurance and quality control procedures. As part of this, assessment organisations and individuals are expected to put in place quality assurance systems that support fair, reliable and consistent assessment across organisations and over time. This could include contributing to regional and national standardisation meetings with other apprenticeship assessment organisations. • Develops and shares detailed criteria for the fair and accurate marking of the reflective portfolio, presentation and interview |

6. Ensuring independence

Independence and impartiality are achieved through the final end-point assessment led by an independent assessor(s). The independent assessor, as chair of the panel, will make a holistic assessment of each apprentice's work on the basis of evidence supplied in the portfolio, presentation and through the interview. Each element of the end-point assessment will be marked against a set of criteria developed by the assessment organisation. The use of two distinct stages in the end-point assessment, the first of which will be marked externally, will also help to ensure independence.

Any organisation that wishes to be an independent assessment service in this area will need to be approved by the Skills Funding Agency and registered on the Register of Apprentice Assessment Organisations. Independent assessor(s) will be drawn from an independent assessment organisation. It will not be permissible for the chosen independent assessor(s) to have any relationship with either the apprentice or employer involved in the assessment.

7. Quality assurance

The assessment methods described above are designed to create consistent and reliable judgments. This section is designed to ensure consistent application of the assessment process. Our approach puts the apprenticeship standard at the heart of assessment which helps to ensure judgments are consistent.

7.1. Internal quality assurance

Assessment Organisations on the Skills Funding Agency's Register of Apprentice Assessment Organisations will need to meet the requirements set out in this assessment plan as detailed below.

- Registered on the Skills Funding Agency's Register of Apprentice Assessment Organisations.
- Recruiting and training independent assessors with specific knowledge of the profession including recent experience (within 5 years) of working in a high quality management consulting setting or holding qualifications at a higher level than the level at which they are assessing.
- Having credibility and experience in delivering assessments within the profession.
- Being responsive to the employer, including customer service processes ensuring that any queries can be addressed as quickly as possible.
- Having the infrastructure and geographical coverage in order to reach a range of apprentices across the country.
- Have established quality assurance and quality control procedures. As part of this, assessment organisations are expected to put in place quality assurance systems that support fair, reliable and consistent assessment across organisations and over time. This could include contributing to regional and national standardisation meetings with other apprenticeship assessment organisations.

- Ensuring independent assessors are trained in the conduct of the assessment and on the application of the assessment criteria for each component.

7.2. External quality assurance

External Quality assurance will be delivered by the Institute for Apprenticeships

8. Delivering accurate, valid judgments

The combination of two assessment methods for the final end-point assessment ensures that an accurate assessment is based on the performance and the quality of the apprentice's work. Taken together the two components build a cumulative picture of apprentice performance against the standards.

- **The reflective portfolio** provides the apprentice with an opportunity to present their learning, development and competence – the application of knowledge, skills and the demonstration of behaviours – across the totality of the standard. To ensure that a sufficient level of detail is evident, apprentices will be required to provide evidence relating to no more than five case studies.
- **The presentation and interview** provides the apprentice the opportunity to discuss in further detail the case studies they chose for their portfolio. It also enables the panel to probe aspects of the apprentice's evidence that would benefit from further discussion. It also allows them to avoid aspects which have already been discussed in adequate detail where competence has clearly been demonstrated.

The submission and assessment of the portfolio prior to the presentation and interview ensures that multiple views are taken of the apprentice's competency helping to ensure the accuracy and validity of judgments.

The role of the independent assessor(s) is critical. As mentioned previously, appropriate quality assurance and quality control procedures must be in place.

9. Final graded assessments

The panel will grade apprentices as "Fail", "Pass" or "Distinction" following the end point assessment and grading panel, with the independent chair making the final decision.

The grading will be based on how evidence within the two end-point assessment components demonstrate that the apprentice has met the requirements set out in the standard, focusing on:

- what the apprentice can evidence they have done,
- how they have approached their work, and
- how they have performed in their roles.

The high-level criteria for each grade are outlined here.

- **Fail:** The apprentice has been performing below the level which is expected of entry-level positions and is outlined in the standard. They should continue to gather evidence, reflect and prepare for interview. The employer will decide when they should be resubmitted for ‘end-point’ assessment.
- **Pass:** The apprentice can perform at an expected level within their job role, meeting the requirements of the standard.
- **Distinction:** The apprentice has regularly demonstrated outstanding performance in their apprenticeship over and above what is expected of them, exceeding the requirements of the standard.

Detailed criteria for “Fail”, “Pass” and “Distinction” will be developed by an assessment organisation based on the high-level criteria above and the occupational profile provided in the annex. This detailed assessment criteria will be made available on the assessment organisation(s)’ website.

Specific marking criteria will also be developed by the assessment organisation(s). This will break down in detail how the assessment criteria is translated into raw marks for each element of the end-point assessment and what mark will be required for a candidate to achieve a pass or distinction in these elements. The overall mark then being calculated and a grade awarded in line with the weightings indicated in the table below.

To achieve a distinction overall, the apprentice must achieve a distinction in both the reflective portfolio and the presentation and interview.

The reflective portfolio will account for 40% of the overall mark with the presentation and interview making up the remaining 60%. The grading of the presentation will account for 50% of the mark for the presentation and interview, with the interview accounting for the remaining 50%.

An overall score for the end-point assessment will be constructed using the weightings outlined below:

| Assessment Component | Weighting | Assessment Grade | Assessment Grade | Assessment Grade | Assessment Grade |
|----------------------------|-----------|------------------|------------------|------------------|------------------|
| Reflective Portfolio | 40% | Pass | Pass | Distinction | Distinction |
| Presentation and Interview | 60% | Pass | Distinction | Pass | Distinction |
| Overall Grade | | Pass | Pass | Pass | Distinction |

Descriptors for the knowledge, skills and behaviours that are expected of apprentices at both a pass and distinction grade are provided in the occupational profile, attached as an annex to this document.

10. Affordability/Implementation

A key driver for our assessment has been to ensure our approach is consistent and directly linked to our standards. Our process is robust and will make the best use of management time. The costs and practicality of assessment have been key considerations in the development of this approach and it

has been tailored to be very easy to manage regardless of employer organisation size or the number of apprentices. Cost effectiveness has been addressed in a number of ways, detailed below.

- The pragmatic combination of assessment methods ensures breadth, validity and reliability to satisfy the assessment requirements whilst minimising additional, non-value adding assessment costs.
- Focus on employer-driven performance management during on-programme assessment
The involvement of the employer in defining the work projects reduces the need for multiple visits by assessor.
- Where appropriate, technology will be used to minimise costs.

Approximately 15% of the overall cost will be attributed to the end-point assessment. This, of course, will vary by employer.

11. Manageability / Feasibility

Independent assessor(s) will travel to the workplace to conduct the end-point assessment where possible.

Technology will be used when necessary for assessing apprentices in remote locations. For instance, the use of e-Portfolios and video conferencing facilities during end-point assessment. Again, there is an emphasis on managing and minimising costs.

The use of independent organisations featured on the Skills Funding Agency's Register of approved training providers. It is expected that there will be around 100 participants per year on the apprenticeship in the first three years, subsequently increasing to around 150. Assessment organisations and training providers have stated that there will be enough provision, in terms of both personnel and geographical spread, to satisfy the demand.

Annex: Occupational Profile

Introduction

It is recognised that a junior management consultant may work in a variety of different roles and this standard allows them to demonstrate a range of skills across variety of internal and external roles. The primary role of a Junior Management Consultant should be to enable them to demonstrate competencies in:

- Business environment
- Management consultancy business
- Business finances
- Project management
- Business Analysis
- Communication
- Team working
- Relationship building
- Personal management
- IT technical capabilities
- Professional development
- Adaptability, and;
- Adherence to legal and ethical frameworks

The employer, apprentice and independent assessor(s) should undertake a programme that will meet the Standard Criteria to ensure all areas of the outcomes are covered in the apprentice job role. Being mindful of business needs, parties should identify and prioritise tasks and select relevant projects that will meet the outcomes stipulated below.

Typical Job Roles

This list of roles is not exhaustive and is intended to indicate the types of activities and scenarios a Junior Management Consultant apprentice might be involved in, in order to meet the necessary outcomes.

Activities:

- Data analysis
- Project management
- Report writing
- Research
- Document creation

Sectors:

- Capital markets
- Banking
- Oil and gas
- Retail and consumer
- Government and public sector
- Telecommunications

Appeals

In the event of an appeal against the grade awarded, an independent assessor(s) who has not been involved in the process until this point will carry out a review of the evidence to confirm or modify the grade.

Knowledge

| Outcome | Example to meet outcome to achieve a pass | Example to meet outcome to achieve a distinction |
|--|---|---|
| <p>Business environment - Know the different industry sectors, the types of organisations within these sectors, and how a management consultancy can support their needs</p> | <p>Able to list the various industries within which management consultancies work and the types of clients they work for (e.g. Investment banking within Capital Markets, Transport within Central Government etc.)</p> <p>Able to describe how the wider economy impacts clients and the types of consultancy services offered to them</p> <p>Able to describe how a management consultancy can help clients with their needs</p> | <p>Able to describe at least one industry or industry sub-sector in detail (e.g. industry trends & key companies)</p> <p>Able to describe how the wider economy has had an impact on specific clients using economic terminology (e.g. discussing the likely consequences of an interest rate rise for a company)</p> |
| <p>Management consultancy business - Know how a consultancy typically works and their role within it, how it manages relationships with its clients and understand the ethical considerations and legal obligations it operates under</p> | <p>Know how to build and maintain relationships with clients</p> <p>Able to identify real or hypothetical ethical dilemmas and explain and justify the best course of action</p> <p>Able to describe how a consultancy goes about winning work and the different stages involved in this (e.g. responding to an EOI – Expression of Interest)</p> <p>Able to describe how their own and competitor consultancies position themselves in the marketplace (e.g. smaller SME consultancies vs.</p> | <p>Able to articulate the importance of building and maintain relationships with clients and know some specific methods to do so</p> <p>Able to evidence an occasion that they were involved in successfully winning work and explain what they did to win it</p> <p>Able to describe the broad consultancy market and the key trends within it as well as more specifically for their own employer and make judgments on the success of consultancies in attempting to stand out in the market</p> |

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| | <p>professional services firms)</p> | |
| <p>Business finances - Know basic financial concepts and performance indicators (such as balance sheets and cash flow forecasts) that are necessary to effectively assess an organisation's financial health and some tools with which to manipulate financial information</p> | <p>Able to describe basic financial concepts and know what they can tell us about an organisation (e.g. Profit and Loss Accounts and Balance Sheets)</p> <p>Able to describe how an organisation is performing against its targets and demonstrates an understanding of the significance of financial year- ends</p> <p>Able to list tools and methodologies to help analyse and create insight into a client or organisation</p> <p>Able to explain why certain tools and methodologies should be used in different contexts</p> | <p>Able to calculate and understand more complex financial metrics and understand their meaning</p> <p>Able to use their knowledge of business finances, calculations and metrics to assess the financial health of an organisation pointing to both strengths, weaknesses and possibilities for growth</p> <p>Able to list a range of analytical tools and methodologies and understand their nuances</p> <p>Able to identify the limits of particular types of analysis and where appropriate critique their use</p> |

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| <p>Project management - Know how a project moves through its lifecycle of planning, design, development, testing, deployment and evaluation. Know what risks and issues are and how to report and monitor them to project and client teams</p> | <p>Able to describe the project lifecycle, some of the reasons that projects go off track, as well as some of the methods through which projects can be effectively managed</p> | <p>Able to describe how portfolios of projects are managed, monitored and prioritised and how project lifecycles fit within this</p> |
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Skills

| Outcome | Example to meet outcome to achieve a pass | Example to meet outcome to achieve a distinction |
|--|---|---|
| <p>Communication skills - Speak and write clearly, influence others, actively listen, question effectively and structure conversations. Support or run meetings and clearly present a point of view to audiences. Communicate appropriately through a variety of channels and platforms</p> | <p>Able to demonstrate effective communication in a range of situations (e.g. with members of their own teams or those of clients, by using call and video conferencing technology, by presenting an idea to a group etc.)</p> <p>Able to use clear, succinct and well-structured business writing which is adapted in style according to audience and purpose</p> <p>Able to use a variety of question types (open, closed, probing, for clarification etc.) and demonstrate active listening (e.g. through mirroring, paraphrasing etc.)</p> <p>Able to flex to the communication style of others</p> <p>Able to assist in producing reports that clearly present information using a range of qualitative information and numerical data</p> | <p>Able to communicate with impact in a wide range of situations (e.g. convincing others of their point of view)</p> <p>Able to present information in a wide range of formats for maximum impact and understand what formats are most appropriate for the audience</p> <p>Able to evidence written client deliverables that they have contributed to and received positive feedback for their input</p> <p>Able to use questioning with skill to obtain specific information</p> <p>Able to produce reports that clearly present information using a range of qualitative information and numerical data</p> |
| <p>Team working skills – Work effectively within a group environment made up of different personality types. Be aware of one’s own and other people’s emotions and use this understanding to guide decisions</p> | <p>Able to apply theories, such as Tuckman’s model of effective teams, to work situations</p> <p>Able to understand what motivates them and those around them in order to maximise effective team working</p> <p>Able to adapt working style to others around them</p> | <p>Able to take the lead in team situations when appropriate (for example on a particular piece of work or an element of a deliverable)</p> <p>Able to work effectively with colleagues and clients at all levels from a diverse range of backgrounds, experience and levels of seniority</p> |

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| | Able to work with colleagues and clients at all levels from a diverse range of backgrounds, experience and levels of seniority | |
| Business analysis – Use a range of tools and methodologies to help analyse an organisation (such as SWOT analysis). Undertake qualitative and quantitative research | <p>Able to use basic business analysis concepts such as SWOT, PEST(LE) and Porter’s 5 Forces within the context of different organisations</p> <p>Able to use both private and publically available data to create insight around a topic or organisation</p> <p>Able to use tools and methodologies specific to the consulting organisation and relevant to their client(s)</p> | <p>Able to evidence insight created for a client having used business analysis</p> <p>Able to manipulate large sets of data to provide insight</p> |
| Relationship building – Build rapport and trust, maintain relationships once they are built and be able to repair them when they are damaged | <p>Able to find commonalities with others to establish relationships quickly</p> <p>Able to be reliable and begin to develop credibility to maintain relationships</p> <p>Able to manage relationships by fostering and encouraging positive relationships within their own and client teams</p> | <p>Able to build relationships with senior members of their own and client teams</p> <p>Able to maintain relationships with a broad spectrum of clients and members of their own teams</p> |
| Personal management – Manage time effectively and prioritise workloads. Take time to reflect on project successes and learn from failure. Maintain good health and energy through a work / life balance | <p>Able to manage multiple commitments ensuring that a high standard of work is maintained in the face of pressure</p> <p>Able to consider what went well on a particular engagement as well as what areas could be developed / improved to improve personal</p> | <p>Able to manage time appropriately to meet deadlines, knowing when to delegate tasks if appropriate and seek senior support when needed</p> <p>Able to reflect on their own performance and make changes to speed their development as a consultant</p> |

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| | <p>performance</p> <p>Know how to keep focused, energised and motivated at work</p> <p>Able to develop strategies to build resilience and manage work loads</p> <p>Able to check own work to ensure it meets client requirements within project deadlines</p> | <p>Able to keep focused, energised and motivated at work</p> |
| <p>Project management - Plan, organise and manage resources in order to achieve set goals. Help create objectives at the start of a project, support the development and implementation of project plans and help monitor progress. Proactively identify risks and issues and help create action plans to address these</p> | <p>Able to create project plans to help keep an engagement on track using the appropriate tools – e.g. Microsoft Project, Microsoft Excel etc.</p> <p>Able to create issues, risks, assumptions, and dependencies logs to ensure that colleagues and clients are aware of threats to project success</p> | <p>Able to maintain a project plan and escalate changes to the plan when appropriate with an understanding of the impact on the project of the changes</p> <p>Able to maintain and monitor issues, risks, assumptions, and dependencies logs to help actively mitigate threats to project success</p> <p>Able to identify risks and other project management metrics and suggest mitigating actions where appropriate</p> |
| <p>IT technical capabilities – Be able to assist in the creation of reports, word processed documents, spreadsheets, slide decks for presentation and software for project management. These are the most prominent, though there are others depending on the consultancy</p> | <p>Able to use a range of IT software to produce clear and accurate communications.</p> | <p>Able to use a wide range of IT software to manipulate information to provide insight</p> <p>Able to use a range of IT software to produce visually stimulating and high impact communications.</p> |

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| Report writing – be able to produce reports that clearly present recommendations for change using a range of qualitative information and numerical data | Able to write in a clear and concise manner clearly articulating an argument Able to spell and punctuate work correctly Able to present a range of data | Able to articulate arguments convincingly taking into account the audience for which the report is intended and adjusting their writing style accordingly Able to present a range of data in a manner that supports the overall argument of a report and is easily understood by the reader Writes with a clear and well defined structure making use of visuals where appropriate |
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Behaviours

| Outcome | Example to meet outcome to achieve a pass | Example to meet outcome to achieve a distinction | Assessment techniques |
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| <p>Professionalism - Reflect the expected behaviours of the organisation, project and client teams. Be tactful and discreet with sensitive information and protect confidentiality</p> | <p>Explain and demonstrate the importance of client confidentiality and independence</p> <p>Know what is expected of them in different roles and projects and, if appropriate, undertake additional learning to meet these expectations</p> <p>Know how to maximise strengths and manage weaknesses</p> <p>Explain and demonstrate the importance of continued professional development in producing high quality work and developing a career</p> <p>Know the goals, vision and values of the organisation and how to contribute to these through their work</p> <p>Explain and demonstrate the importance of meeting or exceeding customers' requirements and expectations</p> <p>Be in tune with the organisational culture</p> <p>Know how the consulting organisation works (e.g. its informal networks)</p> | <p>Able to handle confidential documentation and data, maintaining appropriate controls</p> <p>Able to exceed expectations by going above and beyond what is expected of them in different roles</p> <p>Undertake learning outside of that defined in the apprenticeship and actively use this in the work environment</p> <p>Play an active role within the consulting organisation adding to its ethos and culture</p> | <p>Observation:</p> <p>Feedback from colleagues and / or clients around relationship development and management, the effective handling of sensitive information and the upholding of confidentiality in Evidence Portfolio</p> <p>Relationship development and management</p> <p>What are the most important ways that you have found to manage relationships in your work?</p> <p>Who do you manage relationships with?</p> <p>What do stakeholders respond to well?</p> <p>Handling of sensitive information and confidentiality</p> <p>Continuing to respect confidentiality, how have you handled sensitive information in a secure and appropriate way?</p> |

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| <p>Self-development - Frequently seek and act upon feedback, reflect on performance and have a desire for learning</p> | <p>Proactively seek feedback on working behaviours and outputs, asking for both strengths-based and developmental feedback to improve future performance</p> <p>Able to demonstrate a desire to continuously develop consultancy skills and apply new learning so that it becomes embedded in practice</p> | <p>Able to demonstrate clear progression throughout the course of the apprenticeship and a desire to learn knowledge, skills and behaviours above and beyond their roles and responsibilities</p> <p>Able to demonstrate occasions where they have acted on developmental feedback to learn and develop new skills</p> | <p>Observation</p> <p>Feedback from colleagues and / or clients around seeking and acting on feedback, reflecting on performance and demonstrating a desire for learning</p> <p>Seeking and acting upon feedback</p> <p>Have you sought both positive and developmental feedback from a range of colleagues and clients?</p> <p>How has this enabled you to improve your performance?</p> <p>Reflecting on performance</p> <p>How often have you reflected on your performance and what impact has this had on your development?</p> <p>Desire for learning</p> <p>How have you developed during your time on the apprenticeship?</p> <p>What strategies have you employed in order for you to learn and develop well? For instance, have you read books or articles on topics such as 'Building trust'? Or spoken to 'experts' in their field?</p> |
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| <p>Adaptability - Be flexible to the needs of the project (working times and locations). Be open minded and able to work with a range of different people</p> | <p>Able to accept and be open to work that may take place in different local, regional, national and international locations</p> <p>Able to flex role according to the priorities of the wider team (e.g. when pulling together a 'bid' for work within a tight time frame)</p> <p>Able to adapt working style to that of others</p> <p>Able to tolerate high-pressured and volatile environments and apply strategies (such as effective questioning) to achieve stated objectives</p> | <p>Able to work on multiple projects or pieces of work, changing role, responsibilities and even location at speed if necessary without compromising on performance</p> <p>Able to adapt working styles to deliver the best result for the team and for the client</p> <p>Able to excel in high-pressured and volatile environments</p> | <p>Observation</p> <p>Feedback from colleagues and / or clients around being able to flex working hours and style to the demands of the project; being able to tolerate high-pressured and volatile environments</p> <p>Open to working in different geographical places</p> <p>Have you worked away from the office, not only at client site, but also in different regions or countries?</p> <p>Were you able to adapt successfully to working away?</p> <p>Flexing role and working style</p> <p>Describe a time when you needed to prioritise the work of the wider team over your own</p> <p>How did you balance competing and increasing workloads?</p> <p>Were you able to communicate your workload and deadlines with your team and / or clients around you?</p> <p>Coping within high-pressured environments</p> <p>Describe a time when you managed to deliver the work expected of you within a volatile, high-pressurised environment.</p> |
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| <p>Adherence to legal and ethical frameworks - Work within legal and ethical frameworks to protect all stakeholders, including the client, from reputational damage</p> | <p>Able to demonstrate understanding of the requirements of project work resulting from agreements within engagement contracts and other legally binding documents</p> <p>Able to demonstrate an understanding of the level of confidentiality required of information</p> <p>Able to demonstrate adherence to the consulting organisation's risk management processes</p> | <p>Able to articulate the importance of key legal documents encountered in the course of projects and where possible have involvement in their drafting</p> | <p>Observation</p> <p>Feedback from colleagues and / or clients around appropriately working within legal and ethical frameworks</p> <p>Adherence to legal and ethical frameworks</p> <p>Describe the processes you followed to ensure that risk (of litigation, reputational damage etc.) was identified, managed and mitigated. For instance, contributing to the discussion of project risk</p> |
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