

# YMCA Level 3 NVQ Diploma in Personal Training (501/0158/4)

## Qualification Specification





YMCA Awards

112 Great Russell Street  
London  
WC1B 3NQ

020 7343 1800

[www.ymcaawards.co.uk](http://www.ymcaawards.co.uk)

# Level 3 NVQ Diploma in Personal Training

## Qualification Specification

Qualification number: 501/0158/4

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# Introduction

## About YMCA Awards

At YMCA Awards, we are passionate about learner progress. Our qualifications support every learner, whether taking their first steps into fitness or simply wishing to boost their skills. Our high quality resources and assessment materials have been created by leading industry experts in consultation with employers and training providers.

YMCA Awards are an internationally recognised organisation. We are highly respected in health and fitness circles, and most importantly of all we have helped over 200,000 people launch and advance their careers.

## Qualification overview

This qualification is regulated by:

- Ofqual
- CCEA (Council for Curriculum, Examinations and Assessment)
- QW (Qualifications Wales)

### Qualification aim

This qualification is aimed at learners already working within the health and fitness industry. It allows learners to prove competence through demonstration of their knowledge and skills when working with individuals and groups of clients in a personal training setting.

### Overview of knowledge, skills and understanding

Learners will cover:

- Anatomy and physiology including:
  - The heart and circulatory system
  - The respiratory system
  - Structure and function of the skeleton
  - Musculoskeletal system
  - Postural and core stability
  - The nervous and energy systems and their relation to exercise.
- Designing, managing and adapting a personal training programme
- Motivating and communicating effectively with clients
- Programming safe and effective exercise for a range of clients
- The health benefits of physical activity and the importance of healthy eating
- Applying the principles of nutrition to support client goals as part of an exercise and physical activity programme
- Planning, marketing and selling services to clients
- Health, safety and welfare.

## Target group and age range

This qualification is for learners aged 16+, who want to pursue a career in the health and fitness industry as a personal trainer. It is ideal for learners already working in the industry who would like to upskill.

It is also for those wishing to use the qualification as a platform for progression on to further learning within the health and fitness or active leisure sectors.

## Qualification structure

This qualification is made up of 9 mandatory units and 1 additional unit. Learners are expected to achieve all 48 credits from all 9 mandatory units in order to gain certification.

The Plan, market and sell services unit may also be achieved as an additional unit if required. The total credit value for this qualification is 48 credits (53 credits including the additional unit):

### Mandatory units

Unit reference number	Unit title	Level	Credit
D/601/4484	Promote health, safety and welfare in active leisure and recreation	2	4
F/601/7362	Reflect on and develop own practice in providing exercise and physical activity	2	4
H/601/7760	Design, manage and adapt a personal training programme with clients	3	6
K/601/7758	Motivate clients to maintain long term adherence to exercise and physical activity	3	4
M/601/7759	Evaluate exercise and physical activity programmes	3	3
M/601/7762	Apply the principles of nutrition to support client goals as part of an exercise and physical activity programme	3	7
A/600/9051	Anatomy and physiology for exercise and health	3	6
A/600/9017	Principles of exercise, fitness and health	2	4
K/601/7761	Deliver exercise and physical activity as part of a personal training programme	3	10

### Additional unit

Unit reference number	Unit title	Level	Credit
T/601/7763	Plan, market and sell services	3	5

The Total Qualification Time (TQT) for this qualification is 480. The Guided Learning Hours (GLH) assigned are 295.

## Total Qualification Time (TQT)

This is an estimate of the total amount of time, measured in hours that a learner would reasonably need to be able to show the level of achievement necessary for the award of a qualification.

Total Qualification Time is made up of the following two elements:

(a) the number of hours which an awarding organisation has assigned to a qualification for Guided Learning (see below), and



(b) an estimate of the number of hours a Learner will reasonably be likely to spend in preparation, study or any other form of participation in education or training, including assessment, which takes place as directed by – but not under the immediate guidance or supervision of – a lecturer, supervisor, tutor or other appropriate provider of education or training.

## Guided Learning Hours (GLH)

This is:

- Face-to-face delivery (learning delivered by a lecturer, supervisor, tutor or other appropriate member of the training team)
- e-Learning with a lecturer, teacher or tutor present/available in real-time (the co-presence of learner and tutor can be either remote or in the same physical place)
- Invigilated assessment (external tests sat under controlled or open-book conditions)
- Internal assessment carried out by the learner with a lecturer, teacher or tutor present/available in real-time (the co-presence of learner and tutor can be either remote or in the same physical place).

This is **not**:

Unsupervised learning such as:

- e-Learning that the learner carries out unsupervised and with no real-time support from a lecturer, teacher or tutor
- Assessment internally carried out by the learner without a lecturer, teacher or tutor present/available in real-time (for example, completing a Learner Assessment Record (LAR) at home)
- Any additional further study, revision and training activities that the learner does unsupervised to support their learning.

Recommended Guided Learning Hours – our ongoing review

Your External Quality Assurer (EQA) will ask you to feedback on GLH annually as part of the quality assurance visit. You should base your feedback on a typical learner taking this qualification and the time spent on supervised learning (GLH). If you feel the GLH is different from the above and you wish to feedback before your next EQA visit, please email us: [awards.products@ymca.co.uk](mailto:awards.products@ymca.co.uk).

## Entry requirements

There are no prerequisite qualifications. However, it is recommended that learners hold a Level 2 Certificate in Fitness Instructing.

## Additional Centre guidance

If learners do not already hold a Level 2 fitness instructing qualification, you should provide opportunity for them to acquire the underpinning knowledge and skills required to enable them to achieve the Level 3 NVQ Diploma in Personal Training. For example, learners may not have previously covered anatomy and physiology for exercise, or planning and instructing gym-based exercise, the knowledge of which would be assumed going into this qualification.

## Opportunities for progression

### Future employment possibilities

This qualification can lead to employment or self-employment as a personal trainer or promotion to the role of a personal trainer for a fitness instructor already in employment.

### Progression to further/higher-level learning

This qualification provides progression to other qualifications at the same and higher levels, for example:

- Apprenticeship in exercise and fitness
- YMCA Level 3 Award in Programming and Supervising Exercise with Disabled Clients
- Level 3 Certificate in Sports Massage (Soft Tissue Therapy)
- Level 3 Diploma in Exercise Referral.

## Mapping to standards

This qualification is based on the Personal Training National Occupational Standards (NOS). The NOS, assessment strategy and qualification structure are owned by SkillsActive. See [www.skillsactive.com](http://www.skillsactive.com) for more information.

## Centre approval

This qualification can only be offered by centres approved by YMCA Awards to deliver it. Details of YMCA Awards approvals processes can be found on our website:

[www.ymcaawards.co.uk/centres/become-a-ymca-awards-centre](http://www.ymcaawards.co.uk/centres/become-a-ymca-awards-centre).

## Qualification approval

If your centre is already approved, you should only need to complete and submit a qualification approval form to deliver this qualification. However, you may also need to complete an additional staff approval form if the qualification is going to be delivered by staff who are not currently approved by YMCA Awards. Details of additional approvals can be found on our website: [www.ymcaawards.co.uk/approvals](http://www.ymcaawards.co.uk/approvals).

## Tutor, assessor and IQA approval requirements

To make sure you meet the most up-to-date requirements please see the YMCA Awards staff approval requirement document. This can be found on our website: [www.ymcaawards.co.uk/centres/centre-guidance](http://www.ymcaawards.co.uk/centres/centre-guidance).

## Registration

All learners must be registered within the first 10% of the duration of their course (e.g. for a course that lasts 10 days, learners should be registered on the first day of their course at the latest). For further details on registration please go to our website: [www.ymcaawards.co.uk/registration](http://www.ymcaawards.co.uk/registration).

## Qualification availability

This qualification is available in:

- England and regulated by Ofqual
- Northern Ireland and regulated by CCEA (Council for the Curriculum, Examinations and Assessment)
- Wales and regulated by QW (Qualifications Wales).

## Reasonable adjustments and special considerations

In making this qualification available, YMCA Awards has made every attempt to make sure that there are no unnecessary barriers to achievement. You can find full details of our reasonable adjustment and special considerations policy on our website: [www.ymcaawards.co.uk/centres/policies-and-procedures](http://www.ymcaawards.co.uk/centres/policies-and-procedures).

## Enquires and appeals procedures

YMCA Awards has an appeals procedure in accordance with the regulatory arrangements in the General Conditions of Recognition. Full details of these procedures are available on our website: [www.ymcaawards.co.uk/centres/policies-and-procedures](http://www.ymcaawards.co.uk/centres/policies-and-procedures).

## Assessment and quality assurance

### How the qualification is assessed

Assessment is the process of measuring a learner's skills, knowledge and understanding against the standards set in the qualification.

This qualification is a unit-based qualification and each unit contains learning outcomes and assessment criteria. Learning outcomes set out what the learner is expected to know, understand or be able to do as a result of the learning process. Assessment criteria detail the standards a learner is expected to meet and are broken down into what the learner 'can' do as a result of successfully achieving the unit.

The learner can be assessed holistically or individually as long as they show that the learning outcomes have been achieved.

Competency-based learning outcomes (eg, be able to) are typically assessed through direct observation and these will take place in a real work environment. Where a real-work environment is not stipulated the observation can be simulated and be internally assessed.

Knowledge-based learning outcomes (eg, know or understand) can be assessed in a number of different ways such as worksheets, projects, professional discussion etc. The assessment method chosen should reflect the content of the unit.

This qualification must be assessed in line with YMCA Awards assessment policies and procedures, which can be found at: [www.ymcaawards.co.uk/centres/centre-guidance](http://www.ymcaawards.co.uk/centres/centre-guidance).

The YMCA Level 3 NVQ Diploma in Personal Training is assessed through a combination of internal and external assessment.

### Internal assessment

YMCA Awards suggest the following approaches to internal assessment:

#### Using a Learner Assessment Record (LAR)

This document typically contains assessment guidance and paperwork developed by YMCA Awards to support the assessment of a qualification.

To check if a Learner Assessment Record (LAR) is available for this qualification, please make sure you are logged in to the centre home on the website and follow this link:

[www.ymcaawards.co.uk/download-resources/lars](http://www.ymcaawards.co.uk/download-resources/lars).

## Creating a portfolio of evidence

If a YMCA Awards LAR is not used to evidence internal assessment then the learner must create a portfolio of evidence. Centres must work with learners to create this portfolio and need to make sure that their portfolio shows coverage of the learning outcomes and/or assessment criteria where required.

A typical portfolio of evidence could include:

- Evidence index
- Assessor observation – completed observational checklists and related action plans
- Witness testimony
- Candidate's proof of work
- Worksheets
- Assignments/projects/reports/presentations
- Record of professional discussion
- Record of oral and written questioning
- Candidate and peer reports
- Recognition of Prior Learning (RPL)
- Summary of achievement.

Centres need to make sure assessment specifications and paperwork are signed off by the External Quality Assurer (EQA) before delivery.

As a guide to selecting appropriate assessments methods see the suggested example in the 'Qualification content' section of this specification.

## External assessment

There are externally set, multiple choice question papers for mandatory units Anatomy and physiology for exercise and health and Principles of exercise, fitness and health. To view the mock papers, please see link here: [www.ymcaawards.co.uk/download-resources/mock-papers](http://www.ymcaawards.co.uk/download-resources/mock-papers).

## Assessors

The role of the assessor is to make an informed judgement about the evidence a learner should provide to show they can meet the assessment criteria. For further guidance please see the 'Role of the assessor' document on the website: [www.ymcaawards.co.uk/centres/centre-guidance](http://www.ymcaawards.co.uk/centres/centre-guidance).

## Internal and external quality assurance

The role of the Internal Quality Assurer (IQA) is to make an informed judgement(s) regarding the practice of and decisions made by the assessment team to maintain standards. They are a vital link between the assessors and the EQA. For further information on the role of the IQA and the EQA go to the website: [www.ymcaawards.co.uk/centres/centre-guidance](http://www.ymcaawards.co.uk/centres/centre-guidance).

# Qualification content

## Unit specifications and recommended assessment methods

# Promote health, safety and welfare in active leisure and recreation (D/601/4484)

## Unit aim

This unit covers the knowledge and competence that the learner needs to promote health, safety and welfare in active leisure and recreation.

## Unit content

The learner will:

### 1. Know how to promote health, safety and welfare in active leisure and recreation

The learner can:

- 1.1 List the values or codes of practice relevant to the work being carried out
- 1.2 Describe the requirements for health, safety and welfare relevant to own work, including Health and Safety at Work Act and requirements from relevant National Governing Bodies
- 1.3 Identify manufacturers' guidelines and instructions for the use of facilities and equipment
- 1.4 Describe why health, safety and welfare are important in an active leisure and recreation environment
- 1.5 Identify the persons responsible for health and safety in own workplace
- 1.6 Outline own organisation's security procedures

The learner will:

### 2. Know how to control risks in active leisure and recreation

The learner can:

- 2.1 Describe the types of hazards that are likely to occur in own area of work and the accidents and injuries each could cause
- 2.2 Outline how to identify hazards
- 2.3 List health, safety and security checks to be followed
- 2.4 Describe how to carry out basic risk assessments of the types of hazards that may occur

2.5 Describe why it is important to get advice from a relevant colleague if unsure about hazards and risks in own workplace

2.6 Identify who to ask if unsure about hazards and risks in own workplace

2.7 Describe how to deal correctly with the types of hazards that may occur in own workplace, taking account of risks

2.8 Identify documents relating to health and safety which may have to be completed

2.9 Outline how to complete health and safety documents correctly

2.10 Outline why colleagues and customers should be encouraged to behave in a safe manner

2.11 Describe how to encourage colleagues and customers to behave in a safe manner

2.12 Outline why it is important to make suggestions about health and safety issues

2.13 Describe how to make suggestions about health and safety issues

2.14 Outline why it is important to identify and report any differences between health and safety requirements and own workplace policies and procedures

2.15 Describe how to identify and report any differences between health and safety requirements and own workplace policies and procedure

The learner will:

### 3. Be able to help to control risks in the active leisure and recreation environment

The learner can:

3.1 Ensure that relevant and up-to-date, health and safety information is available

3.2 Follow the relevant health and safety requirements at all times

3.3 Carry out health and safety checks as required

3.4 Identify hazards

3.5 Assess and control risks using organisational procedures

3.6 Get advice from relevant colleagues when unsure about hazards and risks

3.7 Pass on suggestions for improving health and safety to the relevant colleague

The learner will:

### 4. Know how to help to safeguard and protect children and vulnerable adults

The learner can:

- 4.1 Describe what is meant by safeguarding and protecting the welfare of children and vulnerable adults
- 4.2 Describe own role and responsibilities for safeguarding and protecting children and other vulnerable people
- 4.3 List the four of types of abuse
- 4.4 Outline the basic indicators and impact of each of the four types of abuse
- 4.5 Describe the risks that individual abusers or potential abusers pose to children and vulnerable people
- 4.6 Describe organisational policies and procedures in relation to safeguarding and protecting, including the reporting procedures
- 4.7 Outline what to do if concerned about possible abuse
- 4.8 Describe how to respond to a child or someone else disclosing abuse or concerns about abuse
- 4.9 Outline what to do if there are barriers to reporting own concerns
- 4.10 Identify statutory agencies with responsibilities for safeguarding and protecting
- 4.11 Outline when to contact statutory agencies with responsibilities for safeguarding and protecting
- 4.12 Outline how to contact statutory agencies with responsibilities for safeguarding and protecting
- 4.13 Describe why it is important to share concerns about possible abuse with others
- 4.14 Describe the limits of own competence with regard to safeguarding and protecting
- 4.15 Outline why it is important to treat information about possible abuse confidentially

The learner will:

## 5. Be able to help to safeguard and protect children and vulnerable adults

The learner can:

- 5.1 Ensure that up-to-date information on guidelines for safeguarding and protecting children and vulnerable adults is available
- 5.2 Identify what the policies and procedures mean for own job and area of work

5.3 Follow the relevant procedures for:

- safeguarding and protecting children and vulnerable adults at all times
- protecting self from potential accusations

5.4 Be alert to possible signs of abuse

5.5 Identify, record and report any concerns about the welfare of children and vulnerable adults, while maintaining confidentiality

The learner will:

## 6. Know how to deal with injuries and signs of illness

The learner can:

6.1 List the types of accidents, injuries and illnesses that may occur in own area of work

6.2 Outline how to respond correctly to emotional distress

6.3 Outline how to deal with accidents, injuries and illnesses before qualified assistance arrives

6.4 Describe how to decide whether to contact the on-site first aider or immediately call the emergency services

6.5 Identify who is the on-site first aider and how to contact them

6.6 Describe the procedures to contact the emergency services

6.7 Outline why it is important to protect the casualty and others involved from further harm

6.8 Outline the procedures to protect the casualty and others

6.9 Outline why it is important to provide comfort and reassurance

6.10 Describe how to provide comfort and reassurance

6.11 Outline own responsibilities for reporting accidents

6.12 Outline the procedures for reporting accidents

The learner will:

## 7. Be able to deal with injuries and signs of illness

The learner can:

7.1 Remain calm and follow organisational procedures

7.2 Protect the casualty and other people from further risk



7.3 Call for qualified assistance appropriate to the casualty's condition

7.4 Provide reassurance and comfort to the people involved

7.5 Give the qualified assistance clear and accurate information about what happened

7.6 Follow the relevant accident reporting procedures

The learner will:

## 8. Know how to follow emergency procedures

The learner can:

8.1 Describe the emergency procedures in own place of work

8.2 Outline what instructions must be given to the people involved

8.3 Outline organisational reporting procedures for emergencies

8.4 Describe the types of problems that may occur when carrying out emergency procedures

8.5 Describe why problems that occur when carrying out emergency procedures should be reported

8.6 Identify who to report problems to

The learner will:

## 9. Be able to follow emergency procedures

The learner can:

9.1 Give the people involved clear and correct instructions

9.2 Carry out own role in the emergency procedures calmly and correctly

9.3 Maintain the safety of the people involved

9.4 Follow the correct procedures for reporting the emergency

9.5 Report any problems with the emergency procedures to the relevant colleague

Assessment  
specification

Observation, witness testimony, products of work, questioning,  
projects/assignments, reflective accounts

### Additional assessment guidance

This unit must be assessed in accordance with the following 3 documents, which can be downloaded from SkillsActive's website ([www.skillsactive.com/common-unit-qualifications](http://www.skillsactive.com/common-unit-qualifications)):

- Additional Requirements for Qualifications that use the title NVQ within the QCF
- Assessment Strategy for NVQs and SVQs

- QCF Evidence Requirements and Assessment Guidance for the Level 2 NVQ Certificate in Active Leisure, Learning and Well-being Operational Services.

### **Learning outcomes 1, 2, 4, 6 and 8**

These can be assessed by:

- Professional discussion
- Oral questions and answers
- Questions requiring written answers.

### **Learning outcomes 3, 5, 7 and 9**

These must be assessed using workplace evidence generated when the learner is promoting health, safety and welfare in active leisure and recreation.

### **Learning outcome 3**

When helping to control risks in the sport and activity environment, the learner must cover 4 of the following types:

#### (a) Hazards

- 1 Unsafe facilities or environment
- 2 Unsafe equipment
- 3 Unsafe working practices
- 4 Unsafe behaviour
- 5 Use of hazardous substances
- 6 Security breaches
- 7 Situations likely to cause emotional distress.

with 3 of the following types:

#### (b) Methods of control

- 1 Dealing with the hazard personally
- 2 Reporting the hazard to the relevant colleague
- 3 Protecting others from harm.

### **Learning outcome 5**

When helping to safeguard and protect children and vulnerable adults, the learner must cover 2 of the following types:

#### (a) Abuse (including bullying)

- 1 Physical
- 2 Emotional
- 3 Neglect
- 4 Sexual.

Simulation is allowed for 5.5 if there is no naturally occurring evidence available.

### **Learning outcome 7**

When dealing with injuries and signs of illness, the learner must cover 2 of the following types:

#### (a) Casualty

- 1 Adult
- 2 Child
- 3 Person with particular needs.

with 2 of the following types:

#### (b) Qualified assistance

- 1 Qualified first aider
- 2 Emergency services.

with 2 of the following types:

#### (c) Condition

- 1 Minor injury that can be dealt with on-site

- 2 Minor illness that can be dealt with on-site
- 3 Major injury requiring medical attention
- 4 Major illness requiring medical attention
- 5 Emotional distress

Simulation is allowed for this learning outcome if there is no naturally occurring evidence available.

### **Learning outcome 9**

When following emergency procedures, the learner must cover 2 of the following types:

(a) People involved

- 1 Adults
- 2 Children
- 3 People with disabilities

Simulation is allowed for this learning outcome if there is no naturally occurring evidence available.

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# Reflect on and develop own practice in providing exercise and physical activity (F/601/7362)

## Unit aim

This unit covers the knowledge and competence that the learner needs to reflect on and develop their own practice in providing exercise and physical activity.

## Unit content

The learner will:

### 1. Understand how to reflect on and develop own practice in providing exercise and physical activity

The learner can:

1.1 List the values or codes of practice relevant to the work being carried out and describe their importance

1.2 Describe the role of the fitness professional in the industry

1.3 Outline the importance of reflection and continuing professional development in helping clients to develop fitness and motivation

1.4 Outline the structure of the industry

1.5 Identify industry organisations and describe their relevance to the fitness professional

1.6 Outline appropriate registration systems and continuing professional development requirements

1.7 Describe employment opportunities in different sectors of the industry

The learner will:

### 2. Understand how to reflect on own professional practice

The learner can:

2.1 Describe aspects of professional practice that should be reflected on

2.2 Outline the information that should be used to reflect on own professional practice

2.3 Describe different methods of collecting information and how to interpret it

2.4 Describe how to reflect on own professional practice

2.5 Identify key lessons and how to make use of these in future professional practice

2.6 Outline the importance of discussing ideas with another professional

The learner will:

### 3. Be able to reflect on own professional practice

The learner can:

3.1 Review the outcomes of working with clients, their feedback and feedback from other staff

3.2 Identify:

- how effective physical activities were
- how effective and motivational the relationship with the client was
- how well the professional codes of ethics were implemented when working with clients
- how well the instructing style adopted matched clients' needs
- how well the clients' exercise, including their health, safety and welfare were managed
- the effectiveness of interacting and working with other members of staff

3.3 Identify ways in which future practice can be improved

3.4 Discuss ideas with another professional and take account of their views

The learner will:

### 4. Understand how to improve own professional practice and career opportunities

The learner can:

4.1 Identify how often professional practice should be reviewed

4.2 Outline how to access information on developments in exercise and physical activity

4.3 Identify areas in which further development in own professional practice is required

4.4 Describe the importance of having a personal action plan in place for own development

4.5 Outline the types of development activities that are available and how they can be accessed

4.6 Describe the importance of regularly reviewing and updating own personal action plan

The learner will:

### 5. Be able to improve own professional practice and career opportunities

The learner can:

5.1 Review own professional practice on a regular basis

5.2 Keep up-to-date with developments in exercise and physical activity

5.3 Consider own career goals

5.4 Develop a personal action plan that will help to improve professional practice and career prospects

5.5 Take part in relevant development activities as part of the personal action plan

5.6 Review own progress in developing professional practice and career prospects and update the personal action plan accordingly

Assessment  
specification

Observation, witness testimony, products of work, reflective accounts,  
questioning, assignments/projects

#### **Additional assessment guidance**

This unit must be assessed in accordance with the following 3 documents, which can be downloaded from SkillsActive's website ([www.skillsactive.com/common-unit-qualifications](http://www.skillsactive.com/common-unit-qualifications)):

- Additional Requirements for Qualifications that use the title NVQ within the QCF
- Assessment Strategy for NVQs and SVQs
- QCF Evidence Requirements and Assessment Guidance for the Level 2 NVQ Diploma in Instructing Exercise and Fitness.

#### **Learning outcomes 1, 2, and 4**

These can be assessed by:

- Professional discussion
- Oral questions and answers
- Questions requiring written answers

Learning outcomes 3 and 5 must be assessed using workplace evidence generated when the learner is reflecting on and developing own practice in providing exercise and physical activity.

#### **Learning outcome 3**

When reflecting on own professional practice the learner must cover 1 of the following types:

(a) Clients

- 1 Individuals
- 2 Groups.

#### **Learning outcome 5**

This learning outcome must be assessed using workplace evidence generated when the learner is reflecting on and developing own practice in providing exercise and physical activity.

When improving own professional practice and career opportunities the learner must cover 6 of the following types:

(a) Aspects of professional practice

- 1 Planning exercise
- 2 Instructing exercise
- 3 Observing and supporting clients
- 4 Use of resources
- 5 Communicating with clients
- 6 Motivating clients.



# Design, manage and adapt a personal training programme with clients (H/601/7760)

## Unit aim

This unit covers the knowledge and competence that the learner needs to design, manage and adapt a personal training programme with clients.

## Unit content

The learner will:

### 1. Understand how to collect and record information about clients

The learner can:

- 1.1 Explain why it is important to collect accurate information about clients
- 1.2 Explain how to decide what information to collect
- 1.3 Explain safe and appropriate methods that can be used to collect the information needed to plan personal training programmes
- 1.4 Outline the legal and ethical implications of collecting information about clients
- 1.5 Explain how to establish rapport with clients and identify the communication skills needed
- 1.6 Describe the importance of showing empathy and being sensitive to clients' goals and current stage of readiness
- 1.7 Explain how to administer and interpret the Physical Activity Readiness Questionnaire (PAR-Q)
- 1.8 Describe different formats for recording information about clients
- 1.9 Explain professional role boundaries with regard to offering personal training to clients with different medical conditions
- 1.10 Explain when it is necessary to refer clients to another professional and describe the procedure that should be followed
- 1.11 Explain the importance of safeguarding the confidentiality of collected information and describe how to do so



1.12 Analyse the strengths and weaknesses of the various methods of collecting information for different types of clients

1.13 Explain how to ensure clients informed consent is obtained before collecting information

1.14 Outline legal and organisational requirements for data protection and confidentiality

The learner will:

## 2. Be able to collect and record information about clients

The learner can:

2.1 Establish a rapport with clients

2.2 Explain own role and responsibilities to the clients

2.3 Identify what information needs to be collected about clients

2.4 Collect information about clients using appropriate methods

2.5 Show sensitivity and empathy to clients and the information they provide

2.6 Record the information in a way that will help to analyse it

2.7 Identify when clients need referral to another professional

2.8 Maintain client confidentiality in line with good practice procedures

The learner will:

## 3. Understand how to analyse information and agree goals with clients

The learner can:

3.1 Explain why it is important to work together with clients to agree goals and activities

3.2 Explain the importance of long-term behaviour change and how to ensure clients understand and commit themselves to long-term change

3.3 Describe how to organise information in a way which will assist its interpretation and analysis

3.4 Describe how to analyse and interpret collected information so that clients' needs and goals can be identified

3.5 Explain the importance of clients understanding the advantages of taking part in a personal training programme

3.6 Explain why it is important to base goal setting on an analysis of clients' needs

3.7 Describe the possible barriers which may prevent clients achieving their goals

3.8 Explain why it is important to identify and agree short, medium and long-term goals that take account of barriers and discrepancies, including client fears and reservations about physical activity

3.9 Explain when people other than clients should be involved in goal setting

3.10 Explain how to develop, agree and record goals which are appropriate to clients

3.11 Explain how to make goals specific, measurable, achievable, realistic and time bound and identify why this is important

3.12 Assess strategies which can prevent drop out or relapse

The learner will:

#### 4. Be able to analyse information and agree goals with clients

The learner can:

4.1 Analyse the information collected

4.2 Identify any barriers to participation and encourage clients to find a solution

4.3 Agree clients' needs and readiness to participate

4.4 Work with clients to agree short, medium and long-term goals appropriate to their needs

4.5 Ensure the goals are specific, measurable, achievable, realistic and time bound and reflect accepted good practice

4.6 Record the agreed goals in a format that is clear to all those involved in the programme

4.7 Identify and agree strategies to prevent drop out or relapse

The learner will:

#### 5. Understand how to plan, prepare and manage a personal training programme with clients

The learner can:

5.1 Explain why thorough planning and preparation are necessary

5.2 Explain how to research and identify exercises and activities which will help clients to achieve their goals

5.3 Explain how to design personal training programmes according to accepted good practice

- 5.4 Explain how to apply the principles of training to programme design
- 5.5 Explain how to design a progressive programme to allow clients to achieve short, medium and long term goals
- 5.6 Describe how to include physical activities as part of the client's lifestyle to complement exercise sessions
- 5.7 Explain how to choose resources and environments that will help clients to participate in the programme according to their needs
- 5.8 Explain how to design programmes that can be run in environments not designed for physical exercise, for example a client's home or outdoor area
- 5.9 Explain how to decide on the order of exercises and activities in the programme
- 5.10 Outline current guidelines on programme design and safe exercise
- 5.11 Explain how to make sure the components of fitness are built into the programme
- 5.12 Explain how to structure the sessions which make up the programme
- 5.13 Explain how to record the programme
- 5.14 Explain why it is important to agree the programme with clients
- 5.15 Explain when it is appropriate to share the programme with other professionals

The learner will:

## 6. Be able to plan, prepare and manage a personal training programme with clients

The learner can:

- 6.1 Plan specific outcome measures, stages of achievement and exercises/physical activities that are appropriate to clients' goals and level of fitness
- 6.2 Ensure exercises/physical activities are consistent with accepted good practice
- 6.3 Explain and agree the demands of the programme with clients
- 6.4 Plan and agree a progressive timetable of sessions with clients
- 6.5 Agree appropriate evaluation methods and review dates
- 6.6 Identify the resources needed, making best use of the environments in which clients will exercise

6.7 Apply the principles of training to help clients achieve short, medium and long term goals

6.8 Ensure effective integration of all programme exercises/physical activities and sessions

6.9 Provide alternatives to the programmed exercises/physical activities if clients cannot take part as planned

6.10 Record plans in a format that will help all concerned to implement the programme

6.11 Agree how to maintain contact with clients between sessions

The learner will:

## 7. Understand how to review progress with clients

The learner can:

7.1 Explain the importance of monitoring and reviewing programmes with clients

7.2 Assess methods of collecting, analysing and recording information that will help to review progress against goals and initial baseline data

7.3 Describe how to communicate information to clients and provide effective feedback

7.4 Explain why it is important to encourage clients to give their views

7.5 Explain how to analyse and record clients' progress

7.6 Explain why it is important to agree changes with clients

7.7 Explain why it is important to communicate progress and changes to all those involved in the programme

7.8 Explain why it is important to keep accurate records of changes and the reasons for change

The learner will:

## 8. Be able to review progress with clients

The learner can:

8.1 Monitor clients' progress using appropriate methods

8.2 Review progress with clients at agreed points in the programme

8.3 Ensure clients understand the purpose of review and how it fits into their programme

8.4 Encourage clients to give their own views on progress

8.5 Use agreed evaluation guidelines

8.6 Give positive and timely feedback to clients during their review

8.7 Agree review outcomes with clients and keep accurate records

The learner will:

## 9. Understand how to adapt a personal training programme with clients

The learner can:

9.1 Explain how to review short, medium and long term goals with clients taking into account any changes in circumstances

9.2 Explain how the principles of training can be used to adapt the programme where goals are not being achieved or new goals have been identified

9.3 Describe how to communicate adaptations to clients and other professionals

9.4 Explain the different training systems and their use in providing variety and ensuring programmes remain effective

The learner will:

## 10. Be able to adapt a personal training programme with clients

The learner can:

10.1 Identify goals and exercises/physical activities that need to be redefined or adapted

10.2 Agree adaptations, progressions or regressions to meet clients' needs as and when necessary to optimise achievement

10.3 Identify any changes to resources and environments and agree them with clients

10.4 Introduce adaptations in a way that is appropriate to clients and their needs

10.5 Record changes to plans for the programme to take account of adaptations

10.6 Monitor the effectiveness of adaptations and update these as necessary

Assessment  
specification

Observation, questioning, projects/assignments, reflective accounts

### Additional assessment guidance

This unit must be assessed in accordance with the following 3 documents, which can be downloaded from SkillsActive's website ([www.skillsactive.com/common-unit-qualifications](http://www.skillsactive.com/common-unit-qualifications)):

- Additional Requirements for Qualifications that use the title NVQ within the QCF
- Assessment Strategy for NVQs and SVQs
- QCF Evidence Requirements and Assessment Guidance for the Level 3 NVQ Diploma in Personal Training.

### **Learning outcomes 1, 3, 5, 7 and 9**

These can be assessed by:

- Professional discussion
- Oral questions and answers
- Questions requiring written answers.

Learning outcomes 2, 4, 6, 8 and 10 must be assessed using workplace evidence generated when the learner is designing, managing and adapting a personal training programme with clients.

### **Learning outcome 2**

This learning outcome must be assessed using workplace evidence generated when the learner is designing, managing and adapting a personal training programme with clients.

Simulation is allowed for 2.3 if there is no naturally occurring evidence available.

When collecting and recording information about clients the learner must cover 6 of the following types:

(a) Information

- 1 Personal goals
- 2 Lifestyle
- 3 Medical history
- 4 Physical activity history
- 5 Physical activity likes and dislikes
- 6 Attitude, motivation to participate and barriers to participation
- 7 Current fitness level
- 8 Stage of readiness
- 9 Posture and alignment
- 10 Functional ability.

with 2 of the following types:

(b) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs.

with 4 of the following types:

(c) Methods

- 1 Interview
- 2 Questionnaire
- 3 Observation
- 4 Physical/fitness assessments.

### **Learning outcome 4**

This learning outcome must be assessed using workplace evidence generated when the learner is designing, managing and adapting a personal training programme with clients.

When analysing information and agreeing goals with clients the learner must cover 2 of the following types:

(a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs.

with the of the following types:

(b) Goals

- 1 General health and fitness
- 2 Physiological
- 3 Psychological

- 4 Lifestyle
- 5 Social
- 6 Functional ability.

### **Learning outcome 6**

This learning outcome must be assessed using workplace evidence generated when the learner is designing, managing and adapting a personal training programme with clients.

When planning, preparing and managing a personal training programme with clients the learner must cover 4 of the following types:

(a) Exercises/physical activities

- 1 Cardiovascular fitness
- 2 Muscular fitness
- 3 Flexibility
- 4 Motor skills
- 5 Core stability
- 6 Circuit formats

with 2 of the following types:

(b) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs

with 3 of the following types:

(c) Goals

- 1 General health
- 2 Physiological
- 3 Psychological
- 4 Lifestyle
- 5 Social
- 6 Functional ability.

### **Learning outcome 8**

This learning outcome must be assessed using workplace evidence generated when the learner is designing, managing and adapting a personal training programme with clients.

When reviewing progress with clients the learner must cover 2 of the following types:

(a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs

with 4 of the following types:

(b) Methods

- 1 Interviews
- 2 Questionnaires
- 3 Observation
- 4 Physical/fitness assessments

with 3 of the following types:

(c) Goals

- 1 General health and fitness
- 2 Physiological
- 3 Psychological

- 4 Lifestyle
- 5 Social
- 6 Functional ability.

### **Learning outcome 10**

This learning outcome must be assessed using workplace evidence generated when the learner is designing, managing and adapting a personal training programme with clients.

When adapting a personal training programme with clients the learner must cover 2 of the following types:

(a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs

with 3 of the following types:

(b) Goals

- 1 General health and fitness
- 2 Physiological
- 3 Psychological
- 4 Lifestyle
- 5 Social
- 6 Functional ability.



# Motivate clients to maintain long term adherence to exercise and physical activity (K/601/7758)

## Unit aim

This unit covers the knowledge and competence that the learner needs to motivate clients to maintain long term adherence to exercise and physical activity.

## Unit content

The learner will:

### 1. Understand how to establish and maintain an effective relationship with clients

The learner can:

- 1.1 Explain how to present a positive image of self and organisation
- 1.2 Explain why the relationship between the instructor and client is important
- 1.3 Describe the type of instructor/client relationship which will assist client progress and adherence to physical activity
- 1.4 Describe the types of personal qualities that instructors need to develop in order to help and support clients
- 1.5 Explain why clients need to understand the instructors role and responsibilities and the roles and responsibilities of other professionals who may be involved
- 1.6 Explain the extent and limitations of own role and responsibility when working with clients
- 1.7 Describe how to select and use a range of communication strategies to communicate with different clients
- 1.8 Explain how to adapt the relationship with the client to take account of changing needs and circumstances
- 1.9 Explain what is meant by a 'professional relationship' between instructor and client
- 1.10 Explain what is meant by 'valuing diversity' in a practical context when working with clients

- 1.11 Describe the types of prejudice and discrimination that individual clients might experience and how to overcome these
- 1.12 Explain what is meant by 'confidentiality' and why it is important when working with clients, other staff and professionals
- 1.13 Outline the types of information that may be subject to data protection/confidentiality
- 1.14 Explain how to maintain client confidentiality in line with good practice
- 1.15 Explain how abiding by the Exercise and Fitness Code of Ethical Practice acts to ensure that equality and diversity are reflected during the exercise session
- 1.16 Identify the difference between advising on exercise participation and everyday lifestyle physical activity
- 1.17 Explain how to manage conflict and disagreements with colleagues
- 1.18 Outline procedures to follow in the event of client complaints

The learner will:

## 2. Be able to establish and maintain an effective relationship with clients

The learner can:

- 2.1 Present a positive image of self and organisation to clients
- 2.2 Develop an effective working relationship with clients
- 2.3 Clearly define own role and responsibilities to clients and the roles and responsibilities of other professionals who may be involved
- 2.4 Communicate clearly with clients in a way that makes them feel valued
- 2.5 Use instructing styles that match clients' needs
- 2.6 Adapt the relationship with clients to meet their changing needs
- 2.7 Ensure the relationship with clients follows good practice and ethical requirements
- 2.8 Show that diversity and equal opportunities are valued for all clients
- 2.9 Maintain confidentiality requirements
- 2.10 Handle any disagreements and complaints promptly, positively and according to organisational procedures

The learner will:

### 3. Understand how to work with clients to develop and maintain adherence strategies

The learner can:

3.1 Explain why it is important to develop a relationship with the client based on mutual trust and openness

3.2 Explain why it is important for the client to take responsibility for their own fitness and behaviour change

3.3 Analyse behavioural psychology and different approaches to behaviour change

3.4 Assess different strategies to enable clients to change their behaviour and achieve their goals

3.5 Describe the typical goals and expectations that clients have

3.6 Describe the types of barriers individual clients may face when undertaking physical activity and achieving their goals

3.7 Explain how clients can be helped to overcome these barriers

3.8 Describe the types of incentives and rewards that may be appropriate to a range of different clients

3.9 Explain the possible reasons for the types of exercise preferences that different clients may have

3.10 Explain how to assist clients to develop their own adherence strategies

3.11 Explain how to monitor and adapt a client's adherence strategy

3.12 Describe the communication skills needed to assist clients with motivation including:

- how to ask open ended questions
- active listening skills
- methods of gathering personal information
- appropriate questioning techniques
- interpreting client responses including body language and other forms of behaviour especially when undertaking physical activity
- means of summarising gathered information.

The learner will:

## 4. Be able to work with clients to develop and maintain adherence strategies

The learner can:

- 4.1 Work with clients to encourage mutual trust, openness and a willingness to take responsibility for their own fitness and behaviour change
- 4.2 Identify the clients' goals for taking part in regular physical activity and readiness to change behaviour
- 4.3 Analyse the clients' lifestyle and identify opportunities for exercise and physical activity and potential barriers
- 4.4 Identify the clients' preferences for exercise
- 4.5 Identify appropriate incentives and rewards for the clients taking part in physical activity
- 4.6 Work with the clients to develop a long term strategy to adhere to exercise and physical activity, building on opportunities, preferences and incentives, and minimising barriers
- 4.7 Monitor the clients' adherence to exercise and physical activity
- 4.8 Provide support to the clients' adherence strategy to achieve long-term behaviour change in line with their goals
- 4.9 Work with the clients to adapt and refine their adherence strategy

The learner will:

## 5. Understand how to provide ongoing customer service to clients

The learner can:

- 5.1 Explain the importance of client care both to the client and the organisation
- 5.2 Explain why it is important to deal effectively with client/individual needs
- 5.3 Outline the types of information which clients usually need
- 5.4 Outline how to respond to requests according to the organisations procedures
- 5.5 Identify where to source relevant information to meet client needs
- 5.6 Explain what types of issues may need to be referred to another professional, when to refer them and who this professional may be in different situations
- 5.7 Explain the importance of dealing with any delay with clients and describe how to do so effectively

The learner will:

## 6. Be able to provide ongoing customer service to clients

The learner can:

6.1 Engage with clients during exercise

6.2 Respond positively to clients

6.3 Gather as much information as possible about clients' needs and expectations

6.4 Listen to and ask the clients' questions to check own understanding

6.5 Discuss with the clients different ways of meeting their needs and expectations

6.6 Always try to meet clients' needs and expectations to the best of own ability and in line with accepted good practice

6.7 If clients' needs and expectations are beyond own level of competence, consult another professional

6.8 Provide the clients with clear information and advice when they need it

6.9 Find out how well identified solutions work and provide alternative guidance if necessary

6.10 Handle client complaints positively and following agreed procedures

Assessment  
specification

Observation, witness testimony, reflective accounts, questioning,  
projects/assignments

### Additional assessment guidance

This unit must be assessed in accordance with the following 3 documents, which can be downloaded from SkillsActive's website ([www.skillsactive.com/common-unit-qualifications](http://www.skillsactive.com/common-unit-qualifications)):

- Additional Requirements for Qualifications that use the title NVQ within the QCF
- Assessment Strategy for NVQs and SVQs
- QCF Evidence Requirements and Assessment Guidance for the Level 3 NVQ Diploma in Personal Training.

### Learning outcomes 1, 3, and 5

These can be assessed by:

- Professional discussion
- Oral questions and answers
- Questions requiring written answers.

Learning outcomes 2, 4 and 6 must be assessed using workplace evidence generated when the learner is motivating clients to maintain long-term adherence to exercise and physical activity.

### Learning outcome 2

This learning outcome must be assessed using workplace evidence generated when the learner is motivating clients to maintain long-term adherence to exercise and physical activity.

When establishing and maintaining an effective relationship with clients the learner must cover 4 of the following types:

(a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs.

#### **Learning outcome 4**

This learning outcome must be assessed using workplace evidence generated when the learner is motivating clients to maintain long-term adherence to exercise and physical activity.

When working with clients to develop and maintain adherence strategies the learner must cover 4 of the following types:

(a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs.

#### **Learning outcome 6**

This learning outcome must be assessed using workplace evidence generated when the learner is motivating clients to maintain long-term adherence to exercise and physical activity.

When providing ongoing customer service to clients the learner must cover 4 of the following types:

(a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs.

# Evaluate exercise and physical activity programmes (M/601/7759)

## Unit aim

This unit covers the knowledge and competence that the learner needs to evaluate exercise and physical activity programmes.

## Unit content

The learner will:

### 1. Understand how to work with clients to evaluate exercise and physical activity programmes

The learner can:

- 1.1 Explain why it is important to evaluate progressive physical activity programmes
- 1.2 Outline the principles of evaluation in the context of physical activity
- 1.3 Outline what information is needed to evaluate physical activity programmes
- 1.4 Explain methods that can be used to collect the information required to evaluate physical activity programmes
- 1.5 Explain why it is important to evaluate all stages and components of the programme
- 1.6 Describe methods that can be used to organise information so that it can be analysed
- 1.7 Describe methods that can be used to get structured feedback from clients
- 1.8 Explain why structured feedback is important
- 1.9 Explain how to analyse information and client feedback
- 1.10 Explain why it is important to discuss preliminary conclusions with the client
- 1.11 Explain why the client's views are important

The learner will:

## 2. Be able to work with clients to evaluate exercise and physical activity programmes

The learner can:

2.1 Collate all available information regarding the planned programme and client objectives

2.2 Collate information regarding client progress, adaptations to the programme and the reasons for adaptation

2.3 Collate information regarding client adherence

2.4 Collect structured feedback from the client

2.5 Analyse available information and feedback

2.6 Outline preliminary conclusions about the effectiveness of the programme

2.7 Discuss preliminary conclusions with the client and take account of their views

The learner will:

## 3. Understand how to identify lessons for future practice

The learner can:

3.1 Explain why continuous improvement in practice is important for exercise/physical activity instructors

3.2 Explain why it is important to prioritise the improvement of some programme components

3.3 Explain how to prioritise which programme components to work on

3.4 Outline sources of information, advice and best practice on how to improve programme components

3.5 Explain why it is important to share conclusions about improving own practice with other people

3.6 Identify who to share ideas for improvements in own practice with

3.7 Describe how to make use of improvements in own practice in the future



The learner will:

## 4. Be able to identify lessons for future practice

The learner can:

4.1 Identify the relative success of each programme component

4.2 Prioritise those programme components that are vital to improving practice

4.3 Identify how programme components could be improved

4.4 Share own conclusions with relevant people and take account of their feedback

4.5 Undertake further research and development to improve programme components

4.6 Note lessons for future practice

Assessment specification	Observation, witness testimony, products of work, questioning, projects/assignments, reflective accounts
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### Additional assessment guidance

This unit must be assessed in accordance with the following 3 documents, which can be downloaded from SkillsActive's website ([www.skillsactive.com/common-unit-qualifications](http://www.skillsactive.com/common-unit-qualifications)):

- Additional Requirements for Qualifications that use the title NVQ within the QCF
- Assessment Strategy for NVQs & SVQs
- QCF Evidence Requirements and Assessment Guidance for the Level 3 NVQ Diploma in Personal Training.

### Learning outcomes 1 and 3

These can be assessed by:

- Professional discussion
- Oral questions and answers
- Questions requiring written answers.

Learning outcomes 2 and 4 must be assessed using workplace evidence generated when the learner is evaluating exercise and physical activity programmes.

### Learning outcome 2

This learning outcome must be assessed using workplace evidence generated when the learner is evaluating exercise and physical activity programme.

When working with clients to evaluate exercise and physical activity programmes the learner must cover 3 of the following types:

(a) Objectives

- 1 Short term
- 2 Medium term
- 3 Long term.

### Learning outcome 4

This learning outcome must be assessed using workplace evidence generated when the learner is evaluating exercise and physical activity programme.

When identifying lessons for future practice the learner must cover all of the following types:

(a) Programme component

- 1 Information gathering
- 2 Planning
- 3 Selection and structure of activities
- 4 Programme management
- 5 Programme monitoring
- 6 Programme adaptation and progression
- 7 Client relationship
- 8 Client motivation and adherence
- 9 Client satisfaction

with 2 of the following types:

(b) Relevant people

- 1 Colleagues
- 2 Line manager
- 3 Clients.

# Apply the principles of nutrition to support client goals as part of an exercise and physical activity programme (M/601/7762)

## Unit aim

This unit covers the knowledge and competence that the learner needs to apply the principles of nutrition to support client goals as part of an exercise and physical activity programme.

## Unit content

The learner will:

### 1. Understand how to collect and analyse information and agree goals with the client

The learner can:

1.1 Outline the range of professionals and professional bodies involved in the area of nutrition

1.2 Describe how to obtain clients informed consent before collecting nutritional information

1.3 Explain why it is important to collect accurate nutritional information about clients

1.4 Describe the information that needs to be collected to offer nutritional advice to clients safely and effectively

1.5 Outline the legal and ethical implications of collecting nutritional information

1.6 Describe different formats for recording nutritional information

1.7 Explain why confidentiality is important when collecting nutritional information

1.8 Explain issues that may be sensitive when collecting nutritional information

1.9 Explain basic dietary assessment methods

1.10 Evaluate different methods that can be used to measure body composition and health risk in relation to weight including:

- Body Mass Index (BMI)
- waist circumference (WC)
- waist to hip ratio

- skin folds and skin fold indices
- bioelectrical impedance

1.11 Assess health risk in relation to body composition, height and weight, and where available, compare to 'norms'

1.12 Explain how to sensitively divulge the interpretation of collected information and results to clients

1.13 Describe how to recognise the signs and symptoms of disordered eating

1.14 Describe a healthy eating pattern

1.15 Explain the circumstances in which a client should be recommended to visit a GP about the possibility of referral to a Registered Dietitian and the process that should be followed

1.16 Explain the circumstances in which a client should be referred on to a Accredited Sports Dietitian and the process that should be followed

1.17 Analyse and interpret collected information to identify clients' needs and nutritional goals in comparison to National guidelines/the National food model

1.18 Explain how to apply the principles of goal setting when offering nutritional advice

1.19 Explain when to involve people other than the client in nutritional goal setting and identify who these people might be

1.20 Identify barriers which may prevent clients achieving the agreed nutritional goals

1.21 Describe motivational strategies that can be used to encourage healthy eating and prevent non-compliance or relapse

The learner will:

## 2. Be able to collect and analyse information and agree goals with the client

The learner can:

2.1 Collect, record and analyse the information needed about clients' nutritional goals

2.2 Identify when clients need referral to another professional

2.3 Agree clients' needs and readiness to take part

2.4 Agree clients' short, medium and long-term nutritional goals

2.5 Identify barriers to clients achieving the agreed nutritional goals

2.6 Set nutritional goals that are specific, measurable, achievable, realistic and time-bound and reflect accepted good practice

2.7 Record the agreed goals in a format that is clear to all who may be involved

2.8 Identify and agree strategies to prevent non-compliance or relapse

2.9 Identify and agree review points

The learner will:

### 3. Understand how to apply, monitor and adapt the principles of nutrition and weight management to an exercise and physical activity programme

The learner can:

3.1 Describe the structure and function of the digestive system

3.2 Explain the meaning of key nutritional terms including:

- diet
- healthy eating
- nutrition
- balanced diet

3.3 Explain professional role boundaries with regard to offering nutritional advice to clients

3.4 Explain the key nutritional principles/messages and national guidelines that underpin a healthy diet

3.5 Describe the nutritional principles and key features of the National food model/guide

3.6 Explain the relationship between nutrition, physical activity, body composition and health and how to communicate it to clients including:

- links to disease/disease risk factors
- cholesterol (including desirable levels of HDL, LDL, Total Cholesterol: HDL ratio)
- types of fat

3.7 Describe the nutritional requirements and hydration needs of the physical activity programme

3.8 Outline factors that may influence clients' eating habits and prevent them from achieving nutritional goals

3.9 Identify groups of clients at risk of nutritional deficiencies

3.10 Identify how to access reliable sources of nutritional information

3.11 Distinguish between evidence-based knowledge versus the unsubstantiated marketing claims of suppliers

3.12 Explain the role of carbohydrate, fat and protein as fuels for aerobic and anaerobic exercise

3.13 Define the components of energy expenditure and the energy balance equation

3.14 Demonstrate how to determine Basal Metabolic Rate (BMR)

3.15 Demonstrate how to determine energy requirements based on physical activity levels and other relevant factors

3.16 Describe energy needs/expenditure for different physical activities

3.17 Outline the function and metabolism of the macro nutrients

3.18 Outline the function and metabolism of micro nutrients

3.19 Identify the main food groups and the nutrients they contribute to the diet

3.20 Describe portion sizes in the context of the National food model

3.21 Identify the calorific/kilojoule value of nutrients

3.22 Describe common terminology used in nutrition including:

- UK dietary reference values (DRV)
- recommended daily allowance (RDA)
- recommended daily intake (RDI)
- Glycaemic Index

3.23 Describe how to identify and agree nutritional goals and translate them into basic healthy eating advice that reflects current National guidelines

3.24 Interpret food labelling information

3.25 Explain the significance of healthy food preparation

3.26 Explain the potential health and performance implications of severe energy restriction, weight loss and weight gain

3.27 Explain how cultural and religious dietary practices can influence nutritional advice

3.28 Explain the importance of communicating the health risks associated with current weight-loss fads and popular diets to clients

3.29 Explain why detailed or complex dietary analysis that incorporates major dietary change should always be referred to a registered dietitian

3.30 Explain the need for reappraisal of client's body composition and other relevant health parameters at agreed stages of the program

3.31 Outline safety, effectiveness and contraindications relating to protein and vitamin supplementation

3.32 Outline industry guidelines on managing users with suspected eating disorders

The learner will:

**4. Be able to apply, monitor and adapt the principles of nutrition and weight management to an exercise and physical activity programme**

The learner can:

4.1 Analyse clients' nutritional needs and preferences in relation to current status and nutritional goals

4.2 Use credible sources of information and advice in establishing clients' goals

4.3 Design and agree nutritional goals that are compatible with the analysis carried out, accepted good practice and national guidelines

4.4 Identify and obtain credible educational resources for use with clients

4.5 Ensure that the nutritional goals support and integrate with other programme components

4.6 Ensure that clients understand and follow the nutritional advice as part of the exercise and physical activity programme

4.7 Evaluate and review clients' progress towards the agreed nutritional goals

4.8 Monitor and refine clients' nutritional goals during the physical activity programme

Assessment specification

Observation, witness testimony, products of work, reflective account, questioning, projects/assignments

#### **Additional assessment guidance**

This unit must be assessed in accordance with the following 3 documents, which can be downloaded from SkillsActive's website ([www.skillsactive.com/common-unit-qualifications](http://www.skillsactive.com/common-unit-qualifications)):

- Additional Requirements for Qualifications that use the title NVQ within the QCF
- Assessment Strategy for NVQs & SVQs
- QCF Evidence Requirements and Assessment Guidance for the Level 3 NVQ Diploma in Personal Training.

#### **Learning outcomes 1 and 3**

These can be assessed by:

- Professional discussion
- Oral questions and answers
- Questions requiring written answers.

Learning outcomes 2 and 4 must be assessed using workplace evidence generated when the learner is applying the principles of nutrition to support client goals as part of an exercise and physical activity programme.

### **Learning outcome 2**

When collecting and analysing information and agreeing goals with the client the learner must cover 7 of the following types:

#### (a) Information

- 1 Personal goals
- 2 Lifestyle
- 3 Medical history
- 4 Physical activity history
- 5 Diet history
- 6 Food preferences
- 7 Supplement use
- 8 Nutritional knowledge, attitudes and motivation
- 9 Stage of readiness

with 2 of the following types:

#### (b) Clients

- 1 With specific fitness needs
- 2 With general health needs

with 2 of the following types:

#### (c) Goals

- 1 Healthy eating
- 2 Weight management
- 3 Improved fitness
- 4 Improved self-image.

Simulation is allowed for 2.1 if there is no naturally occurring evidence available.

### **Learning outcome 4**

When applying, monitoring and adapting the principles of nutrition and weight management to an exercise and physical activity programme the learner must cover 2 of the following types:

#### (a) Clients

- 1 With specific fitness needs
- 2 With general health needs

with 2 of the following types of:

#### (b) Goals

- 1 Healthy eating
- 2 Weight management
- 3 Improved fitness
- 4 Improved self-image



# Anatomy and physiology for exercise and health (A/600/9051)

## Unit aim

This unit covers the knowledge an instructor needs about anatomy and physiology relating to exercise programming for a range of clients.

## Unit content

The learner will:

### 1. Understand the heart and circulatory system and its relation to exercise and health

The learner can:

1.1 Explain the function of the heart valves

1.2 Describe coronary circulation

1.3 Explain the effect of disease processes on the structure and function of blood vessels

1.4 Explain the short and long term effects of exercise on blood pressure, including the valsalva effect

1.5 Explain the cardiovascular benefits and risks of endurance/aerobic training

1.6 Define blood pressure classifications and associated health risks

The learner will:

### 2. Understand the musculoskeletal system and its relation to exercise

The learner can:

2.1 Explain the cellular structure of muscle fibres

2.2 Describe the sliding filament theory

2.3 Explain the effects of different types of exercises on muscle fibre type

2.4 Identify and locate the muscle attachment sites for the major muscles of the body

2.5 Name, locate and explain the function of skeletal muscle involved in physical activity

2.6 Identify the anatomical axis and planes with regard to joint actions and different exercises

2.7 Explain the joint actions brought about by specific muscle group contractions

2.8 Describe joints/joint structure with regard to range of motion/movement and injury risk

2.9 Describe joint movement potential and joint actions

2.10 Describe the structure of the pelvic girdle and associated muscles and ligaments

The learner will:

### 3. Understand postural and core stability

The learner can:

3.1 Describe the structure and function of the stabilising ligaments and muscles of the spine

3.2 Describe local muscle changes that can take place due to insufficient stabilisation

3.3 Explain the potential effects of abdominal adiposity and poor posture on movement efficiency

3.4 Explain the potential problems that can occur as a result of postural deviations

3.5 Explain the impact of core stabilisation exercise and the potential for injury/aggravation of problems

3.6 Explain the benefits, risks and applications of the following types of stretching:

- static (passive and active)
- dynamic
- Proprioceptive Neuromuscular Facilitation

The learner will:

### 4. Understand the nervous system and its relation to exercise

The learner can:

4.1 Describe the specific roles of:

- the central nervous system (CNS)
- the Peripheral Nervous System (PNS) including somatic and autonomic systems

4.2 Describe nervous control and transmission of a nervous impulse

4.3 Describe the structure and function of a neuron

4.4 Explain the role of a motor unit

4.5 Explain the process of motor unit recruitment and the significance of a motor unit's size and number of muscle fibres

4.6 Explain the function of muscle proprioceptors and the stretch reflex

4.7 Explain reciprocal inhibition and its relevance to exercise

4.8 Explain the neuromuscular adaptations associated with exercise/training

4.9 Explain the benefits of improved neuromuscular coordination/efficiency to exercise performance

The learner will:

## 5. Understand the endocrine system and its relation to exercise and health

The learner can:

5.1 Describe the functions of the endocrine system

5.2 Identify the major glands in the endocrine system

5.3 Explain the function of hormones including:

- growth hormone
- thyroid hormones
- corticosteroids
- catecholamines
- insulin
- glucagon

The learner will:

## 6. Understand energy systems and their relation to exercise

The learner can:

6.1 Identify the contribution of energy according to:

- duration of exercise/activity being performed
- type of exercise/activity being performed
- intensity of exercise/activity being performed

6.2 Identify the by-products of the three energy systems and their significance in muscle fatigue

6.3 Describe the effect of endurance training/advanced training methods on the use of fuel for exercise

Assessment  
specification

Externally set and assessed multiple choice theory paper

# Principles of exercise, fitness and health (A/600/9017)

## Unit aim

This unit covers the knowledge an instructor needs to programme safe and effective exercise for a range of clients, the health benefits of physical activity and the importance of healthy eating.

## Unit content

The learner will:

### 1. Understand the effects of exercise on the body

The learner can:

- 1.1 Describe cardiovascular and respiratory adaptations to endurance/aerobic training
- 1.2 Identify the short and long term effects of exercise on blood pressure
- 1.3 Describe the 'blood pooling' effect following exercise
- 1.4 Describe the effects of exercise on bones and joints including the significance of weight-bearing exercise
- 1.5 Describe delayed onset of muscle soreness (DOMS)
- 1.6 Identify exercises or techniques likely to cause delayed onset of muscle soreness
- 1.7 Describe the short and long term effects of different types of exercise on muscle
- 1.8 Describe different exercises that can improve posture

The learner will:

### 2. Understand the components of fitness

The learner can:

- 2.1 Define the components of health related fitness
- 2.2 Define the components of skill related fitness
- 2.3 Identify the factors that affect health and skill related fitness

The learner will:

### 3. Understand how to apply the principles and variables of fitness to an exercise programme

The learner can:

3.1 Describe the physiological implications of:

- specificity
- progressive overload
- reversibility
- adaptability
- individuality
- recovery time

3.2 Explain the principles of FITT (Frequency, Intensity, Time and Type)

3.3 Explain the principles of a progressive training programme in developing components of fitness

3.4 Explain how to recognise when and how to regress a training programme

3.5 Explain the principles of adaptation, modification and progression for each component of FITT (Frequency, Intensity, Time and Type)

3.6 Describe the effect of speed on posture, alignment and intensity

3.7 Describe the effect of levers, gravity and resistance on exercise

3.8 Describe the differences between programming exercise for physical fitness and for health benefits

The learner will:

### 4. Understand the Exercise contraindications and key safety guidelines for special populations

The learner can:

4.1 Describe the exercise contraindications and key safety guidelines for working with older people (50 plus)

4.2 Describe the exercise contraindications and key safety guidelines for working with antenatal and postnatal clients

4.3 Describe the exercise contraindications and key safety guidelines for working with young people (14–16)

4.4 Describe the key safety considerations for working with disabled people

The learner will:

## 5. Understand how to safely monitor exercise intensity

The learner can:

5.1 Describe the benefits and limitations of different methods of monitoring exercise intensity including:

- the talk test
- Rate of Perceived Exertion (RPE)
- heart rate monitoring and the use of different heart rate zones

The learner will:

## 6. Understand the health benefits of physical activity

The learner can:

6.1 Describe the health benefits of physical activity

6.2 Describe the effect of physical activity on the causes of certain diseases including:

- coronary heart disease
- some cancers
- type 2 Diabetes
- hypertension
- obesity
- osteoporosis

The learner will:

## 7. Understand the importance of healthy eating

The learner can:

7.1 Describe the national food model/guide

7.2 Describe key healthy eating advice that underpins a healthy diet

7.3 Explain the importance of adequate hydration

7.4 Explain professional role boundaries in relation to offering nutritional advice

7.5 Explain the dietary role of the key nutrients

7.6 Identify the common dietary sources of the key nutrients

7.7 Describe the energy balance equation

7.8 Explain the health risks of poor nutrition

Assessment  
specification

Externally set and marked multiple choice theory paper

# Deliver exercise and physical activity as part of a personal training programme (K/601/7761)

## Unit aim

This unit covers the knowledge and competence that the learner needs to deliver exercise and physical activity as part of a personal training programme.

## Unit content

The learner will:

### 1. Understand how to plan and prepare individualised exercise sessions

The learner can:

1.1 Explain the importance of careful and thorough planning and preparation before physical exercise

1.2 Explain how to identify specific objectives from the overall programme goals

1.3 Explain how timings, intensities and sequences can affect programme outcomes

1.4 Explain the importance of matching teaching and learning styles to maximise clients' progress and motivation

1.5 Describe how to utilise verbal and non-verbal communication techniques

1.6 Explain how to select and prepare the equipment and environment as needed

1.7 Explain how to work in environments that are not specifically designed for physical exercise

The learner will:

### 2. Be able to plan and prepare individualised exercise sessions

The learner can:

2.1 Provide a range of exercises to help clients achieve objectives and goals

2.2 Plan and agree the focus of exercises and utilise the resources available, improvising safely where necessary

2.3 Plan realistic timings, intensities and sequences of exercises

## 2.4 Identify, obtain and prepare the resources needed for the planned exercises

The learner will:

### 3. Understand how to prepare clients for individualised exercise sessions

The learner can:

- 3.1 Explain why it is important to ensure clients are properly prepared physically and psychologically before activity begins
- 3.2 Explain why it is important to find out how clients responded to previous physical activity and if anything has changed since then
- 3.3 Describe the importance of explaining the planned objectives and activities to clients
- 3.4 Explain why clients need to know the physical and technical demands of the activity and how this might affect motivation
- 3.5 Explain why it may be necessary to negotiate and agree changes to plans with clients
- 3.6 Explain why and how any changes to plans should be recorded
- 3.7 Outline the health, safety and emergency procedures and requirements
- 3.8 Explain why clients need to know about health, safety and emergency procedures

The learner will:

### 4. Be able to prepare clients for individualised exercise sessions

The learner can:

- 4.1 Meet clients punctually and make them feel at ease
- 4.2 Collect any new information about clients' response to previous activity
- 4.3 Discuss the planned objectives and exercises for the session and how these link to clients' goals
- 4.4 Discuss the physical and technical demands of the planned exercises and how clients can progress or regress these to meet goals
- 4.5 Assess, agree and review clients' state of readiness and motivation to take part in the planned exercises
- 4.6 Negotiate, agree and record changes to the planned exercises with clients to meet goals and preferences and enable them to maintain progress

The learner will:



## 5. Understand how to teach and adapt planned exercises

The learner can:

5.1 Explain why a balance of instruction, exercise and discussion is important when instructing clients

5.2 Outline the range of approved teaching and motivational styles that can be used and explain how to vary these according to clients' response

5.3 Explain the importance of warm-up and the range of warm-up activities that can be used for the activities being taught

5.4 Explain how to choose warm-ups appropriate to different clients and conditions

5.5 Explain why clients should understand the purpose and value of warm-up

5.6 Explain how to provide instructions, demonstrations and explanations clearly and effectively

5.7 Describe the correct positions for the exercises being taught

5.8 Explain how to adapt exercise positions as appropriate to individual clients and conditions

5.9 Explain why it is important to make sure clients understand instructions, demonstrations and explanations and describe how this can be done

5.10 Explain the importance of non-verbal communication and the effect of body language

5.11 Explain how to adapt communication to meet clients' needs

5.12 Explain why it is important to monitor individual progress especially if more than one client is involved

5.13 Appraise methods of monitoring clients' progress

5.14 Identify when it may be necessary to adapt planned exercises to meet clients' needs and explain how to do so

5.15 Explain methods of maintaining clients' motivation especially when they are finding exercises difficult

5.16 Explain the importance of correcting techniques and how to adopt appropriate teaching styles to ensure clients apply techniques correctly

5.17 Explain how to modify the intensity of exercise to match clients' response to physical activity

The learner will:

## 6. Be able to teach and adapt planned exercises

The learner can:

- 6.1 Ensure there is an effective balance of instruction, activity and discussion within the session
- 6.2 Use teaching and motivational styles that are appropriate to clients and accepted good practice
- 6.3 Provide clients with an appropriate warm-up
- 6.4 Make best use of the environment in which clients are exercising
- 6.5 Provide instructions, explanations and demonstrations that are technically correct, safe and effective
- 6.6 Check clients' understanding of instructions, explanations and demonstrations
- 6.7 Adapt verbal and non-verbal communication methods to make sure clients understand what is required
- 6.8 Ensure clients can carry out the exercises safely on their own
- 6.9 Observe and analyse clients' performance, providing positive reinforcement throughout
- 6.10 Correct techniques at appropriate points
- 6.11 Progress or regress exercises according to clients' performance

The learner will:

## 7. Understand how to bring exercise sessions to an end

The learner can:

- 7.1 Explain why it is important to allow sufficient time for clients to finish exercising and how the cool-down can be adapted to different levels of client needs and experience
- 7.2 Explain the purpose and value of cool-down activities and how to select these according to the type and intensity of physical exercise and clients' needs and condition
- 7.3 Explain why clients should understand the value and purpose of cool-down
- 7.4 Describe why clients should be given the opportunity to ask questions, provide feedback and discuss their performance and explain how to make sure this happens
- 7.5 Describe why clients should be given feedback on their performance and explain how to do this in a way that is accurate but maintains client motivation and commitment

7.6 Explain why clients need to see their progress against objectives in terms of their overall goals and programme

7.7 Explain why clients need information about future activities, either supervised or unsupervised

7.8 Outline the correct procedures for dealing with equipment and the wider facility once the session is over

The learner will:

## 8. Be able to bring exercise sessions to an end

The learner can:

8.1 Allow sufficient time for the closing phase of the session

8.2 End the exercises using a cool down that is safe and effective for clients

8.3 Provide clients with positive reinforcement about their performance

8.4 Give clients feedback on the session

8.5 Explain to clients how progress made links to their short, medium and long term goals

8.6 Discuss other possible physical activities with clients

8.7 Leave the environment in a condition suitable for future use

Assessment specification

Observation, witness testimony, products of work, reflective accounts, questioning, projects/assignments

### Additional assessment guidance

This unit must be assessed in accordance with the following 3 documents, which can be downloaded from SkillsActive's website ([www.skillsactive.com/common-unit-qualifications](http://www.skillsactive.com/common-unit-qualifications)):

- Additional Requirements for Qualifications that use the title NVQ within the QCF
- Assessment Strategy for NVQs & SVQs
- QCF Evidence Requirements and Assessment Guidance for the Level 3 NVQ Diploma in Personal Training.

### Learning outcomes 1, 3, 5 and 7

These can be assessed by:

- Professional discussion
- Oral questions and answers
- Questions requiring written answers.

Learning outcomes 2, 4, 6 and 8 must be assessed using workplace evidence generated when the learner is delivering exercise and physical activity as part of a personal training programme.

## Learning outcome 2

This learning outcome must be assessed using workplace evidence generated when the learner is delivering exercise and physical activity as part of a personal training programme.

When planning and preparing individualised exercise sessions the learner must cover 3 of the following types:

### (a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs

With 2 of the following types:

### (b) Resources

- 1 Environment for the session
- 2 Portable equipment
- 3 Fixed equipment

with 4 of the following types:

### (c) Exercises

- 1 Cardiovascular fitness
- 2 Muscular fitness
- 3 Flexibility
- 4 Motor skills
- 5 Core stability
- 6 Circuit formats.

## Learning outcome 4

This learning outcome must be assessed using workplace evidence generated when the learner is delivering exercise and physical activity as part of a personal training programme.

When preparing clients for individualised exercise sessions the learner must cover 2 of the following types:

### (a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs

with 5 of the following types:

### (b) Goals

- 1 General health and fitness
- 2 Physiological
- 3 Psychological
- 4 Lifestyle
- 5 Social
- 6 Functional ability

with 4 of the following types:

### (c) Exercises

- 1 Cardiovascular fitness
- 2 Muscular fitness
- 3 Flexibility
- 4 Motor skills
- 5 Core stability
- 6 Circuit formats.

## Learning outcome 6

This learning outcome must be assessed using workplace evidence generated when the learner is delivering exercise and physical activity as part of a personal training programme.

When teaching and adapting planned exercises the learner must cover 3 of the following types:

(a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs

with 4 of the following types:

(b) Exercises

- 1 Cardiovascular fitness
- 2 Muscular fitness
- 3 Flexibility
- 4 Motor skills
- 5 Core stability
- 6 Circuit formats

with 2 of the following types:

(c) Environments

- 1 Gym
- 2 Studio/sports hall
- 3 Client's home or other enclosed space
- 4 Outdoors.

### **Learning outcome 8**

This learning outcome must be assessed using workplace evidence generated when the learner is delivering exercise and physical activity as part of a personal training programme.

When bringing exercise sessions to an end the learner must cover 3 of the following types:

(a) Clients

- 1 Individuals
- 2 Groups
- 3 With specific fitness needs
- 4 With general health needs

with 4 of the following types:

(b) Exercises

- 1 Cardiovascular fitness
- 2 Muscular fitness
- 3 Flexibility
- 4 Motor skills
- 5 Core stability
- 6 Circuit formats.

# Plan, market and sell services (T/601/7763)

## Unit aim

This unit covers the knowledge and competence that the learner needs to plan, market and sell services.

## Unit content

The learner will:

### 1. Understand how to plan marketing and sales

The learner can:

1.1 Identify the sources of marketing and sales information

1.2 Describe how the market is segmented/divided by:

- age
- income
- occupation/social class
- the benefits that potential clients are looking for

1.3 Assess the market in terms of:

- the pricing of the service
- the promotion of the service
- customer needs and expectations
- trends in the industry

1.4 Explain how to identify competitors and assess their strengths and weaknesses

1.5 Explain how to identify and assess own strengths and weaknesses

1.6 Describe how to develop services that address a certain 'niche' in the market

1.7 Explain how to cost services and develop marketing and sales plans that take account of cash flow and tax considerations

1.8 Explain the importance of testing proposed products and services with other people and describe how to do so

1.9 Explain the importance of having realistic and achievable targets for marketing and sales

1.10 Explain how to develop sales and marketing targets

1.11 Explain the importance of being able to evaluate sales and marketing plans

## 1.12 Explain ways of monitoring and evaluating marketing and sales

The learner will:

## 2. Be able to plan marketing and sales

The learner can:

2.1 Research the market according to the service being offered

2.2 Identify existing and new trends in the industry

2.3 Identify competitors and analyse their strengths and weaknesses in comparison to own

2.4 Identify the types of client who might be interested in the services and the benefits they are looking for

2.5 Develop and cost services that will be attractive to potential clients

2.6 Test these services with other people and obtain their feedback

2.7 Set realistic and achievable marketing and sales targets within defined timescales

2.8 Decide how to evaluate the marketing and sales aspects of the service

The learner will:

## 3. Understand how to market services

The learner can:

3.1 Identify the best ways of reaching potential clients

3.2 Describe the 'image' clients may have of the types of services offered and how to develop an image that is unique

3.3 Explain how to present services so that they and their benefits will be attractive to clients

3.4 Describe different ways to present/market the services

3.5 Explain the importance of being proactive in marketing and reaching potential clients

3.6 Explain the importance of promoting the value and benefits of the services to clients

3.7 Explain the importance of monitoring the effectiveness of marketing and sales activities

3.8 Explain how to overcome problems and improve services

3.9 Describe methods of monitoring marketing and sales

The learner will:

## 4. Be able to market services

The learner can:

- 4.1 Identify the best ways to reach potential clients
- 4.2 Present the services so that they are attractive to potential clients
- 4.3 Promote the value and benefits of the services to clients
- 4.4 Keep track of marketing and sales and compare what is being achieved with set targets
- 4.5 Find ways of improving marketing and sales

The learner will:

## 5. Understand how to sell services directly to clients

The learner can:

- 5.1 Explain the importance of being proactive in selling without giving the impression of ‘the hard sell’ and describe how to do so
- 5.2 Explain why it is important to correctly identify client’s needs and expectations in relation to the services offered
- 5.3 Explain how to identify services that match or come close to client’s needs and expectations
- 5.4 Explain the importance of ensuring accurate information is provided especially in relation to legal requirements covering trade descriptions and sale of goods
- 5.5 Explain the importance of giving clients the opportunity to ask questions and discuss the services and their benefits
- 5.6 Identify buying signals that a client might give and how they can be used to help move the sale on
- 5.7 Explain the importance of negotiating services that meet both own needs and that of the client
- 5.8 Explain how to confirm the client is ready to complete the sale without making them feel rushed and why this is an important stage
- 5.9 Explain why it is important to agree terms with the client and how to do so
- 5.10 Outline the relevant documents that need to be completed and why these are important



The learner will:

## 6. Be able to sell services directly to clients

The learner can:

6.1 Identify client's needs and expectations

6.2 Suggest services that meet client's needs and expectations

6.3 Provide information about the services and their benefits clearly, accurately and in a way that will motivate the client to take them up

6.4 Give the client full opportunity to ask questions and discuss the services and their benefits and if necessary, think about their decision

6.5 Identify buying signals from the client and use these to move the sale on

6.6 Offer and agree a service that meets own needs and those of the client

6.7 Ensure the client is ready to commit themselves to the sale

6.8 Agree terms with the client and make sure they are satisfied with the sale

6.9 Ensure all relevant documents are completed

The learner will:

## 7. Understand how to follow up marketing and client enquiries

The learner can:

7.1 Explain the importance of keeping up to date information on marketing and client enquiries

7.2 Outline the features of a client service management system and how to choose a method that is most appropriate to the business/service offered

7.3 Outline the legal and organisational requirements for data protection and how to ensure that they are followed

The learner will:

## 8. Be able to follow up marketing and client enquiries

The learner can:

8.1 Develop and keep up-to-date a client service management system

8.2 Keep in regular contact with existing clients and with those who have made enquiries

8.3 Provide existing clients and prospective clients with information on new and existing services

## 8.4 Respond promptly and positively to further enquiries and make efforts to obtain new business

## 8.5 Follow all legal and organisational requirements for data protection

Assessment specification

Observation, witness testimony, products of work, reflective accounts, questioning, projects/assignments

### Additional assessment guidance

This unit must be assessed in accordance with the following 3 documents, which can be downloaded from SkillsActive's website ([www.skillsactive.com/common-unit-qualifications](http://www.skillsactive.com/common-unit-qualifications)):

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### Learning outcomes 1, 3, 5 and 7

These can be assessed by:

- Professional discussion
- Oral questions and answers
- Questions requiring written answers.

Learning outcomes 2, 4, 6 and 8 must be assessed using workplace evidence generated when the learner is planning, marketing and selling services.

### Learning outcome 2

This learning outcome must be assessed using workplace evidence generated when the learner is planning, marketing and selling services.

When planning marketing and sales the learner must cover 2 of the following types:

(a) Market

- 1 Existing
- 2 New.

### Learning outcome 4

This learning outcome must be assessed using workplace evidence generated when the learner is planning, marketing and selling services.

When marketing services the learner must cover 2 of the following types:

(a) Best ways to reach potential clients

- 1 Personally
- 2 Through other people

with 2 of the following types:

(b) Ways to present the services

- 1 Talking to people directly
- 2 Using printed materials
- 3 Electronically.

### Learning outcome 6

This learning outcome must be assessed using workplace evidence generated when the learner is planning, marketing and selling services.

When selling services directly to clients the learner must cover 2 of the following types:

(a) Information

- 1 Spoken

- 2 Written
- 3 Electronic.

**Learning outcome 8**

This learning outcome must be assessed using workplace evidence generated when the learner is planning, marketing and selling services.

When following up marketing and client enquiries the learner must cover 2 of the following types:

(a) Information

- 1 Spoken
- 2 Written
- 3 Electronic.







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