

# propertymark QUALIFICATIONS

PROPERTYMARK QUALIFICATIONS  
LEVEL 4 CERTIFICATE IN PROPERTY AGENCY  
MANAGEMENT

QUALIFICATION SPECIFICATION

ACADEMIC YEAR 2025/2026  
FOR ASSESSMENT FROM JANUARY 2026  
VERSION 1.6

## ABOUT PROPERTYMARK QUALIFICATIONS?

Propertymark Qualifications is the UK's specialist awarding organisation offering industry recognised qualifications in property and property affiliated disciplines. We draw our expertise from an array of experienced property industry practitioners and academics from relevant fields including property, law, surveying and finance.

Propertymark Qualifications is an independent organisation and is recognised by the national qualification regulators in England, Wales, and Northern Ireland; namely the Office of the Qualifications and Examinations Regulator (Ofqual), Qualifications Wales and the Council for Curriculum, Assessment and Examinations (CCEA Regulation) respectively. We also offer qualifications which are credit and level rated in the Scottish Credit and Qualifications Framework (SCQF). This means we follow strict guidelines and maintain quality standards in the provision of all our qualifications.

Propertymark Qualifications has been operating as a recognised and regulated awarding body since March 2002 with our first qualifications being awarded to candidates in 2003. We work in association with professional membership bodies which allows us to collaborate with them and draw on their expertise and experience to ensure the design and development of our qualifications is at pace with changes in the industry at large.

Propertymark Qualifications is also recognised by Skills England and Ofqual to deliver assessments as an Assessment Organisation for the apprenticeship standards for which we are approved.

All of this puts us in a unique position to provide tailored and industry specific qualifications that meet industry requirements, reinforce industry standards, and afford individuals the opportunity to progress.

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## WHO IS THE QUALIFICATION FOR?

The **Propertymark Qualifications Level 4 Certificate in Property Agency Management** is for those who work or want to work in a management, supervisory or leadership role within the property sector. The **Propertymark Qualifications Level 4 Certificate in Property Agency Management** applies to all property disciplines to enable those working in Sales (residential, commercial or sale by auction) and Lettings, and wherever located in the UK, to access the same qualification.

## QUALIFICATION PURPOSE

The **Propertymark Qualifications Level 4 Certificate in Property Agency Management** recognises the knowledge of those responsible for, and involved in, the management of property agency activities. The qualification provides progression from operational property agency technical skills with recognition of best professional practices in property agency management. The qualification supports a wide range of property disciplines and is recognised in England, Wales, Scotland and Northern Ireland by professional bodies and by regulators in England, Wales and Northern Ireland.

## OTHER INFORMATION

This qualification can fulfil part of the criteria to join various professional bodies and meet requirements of industry regulatory and licensing schemes.

This qualification is accepted for Fellow membership by Propertymark. If you have any queries regarding Propertymark membership, then please contact Propertymark's membership department directly, or visit [propertymark.co.uk](https://www.propertymark.co.uk).

## QUALIFICATION SUMMARY AND KEY INFORMATION

<b>Qualification Title</b>	<b>Propertymark Qualifications Level 4 Certificate in Property Agency Management</b>
<b>Ofqual Accreditation Number</b>	610/1854/5
<b>Approved age ranges</b>	18 +
<b>Assessment</b>	Onscreen assessment
<b>Guided Learning Hours</b>	130
<b>Total Qualification Time</b>	250 hours
<b>Grading information</b>	Distinction, Pass or Fail

## UNITS AND STRUCTURE

The tables below give the unit titles, the credit value and total qualification time (TQT) of each unit. TQT includes guided learning hours (GLH), additional unsupported learning, and assessment time.

<b>Unit Accreditation Number</b>	<b>Propertymark Qualifications Unit Code</b>	<b>Unit Title</b>	<b>GLH</b>	<b>TQT</b>	<b>Credit</b>
T/650/4730	CPAM1	Compliance and Ethical Practices in Property Agency Management	40	80	8
Y/650/4731	CPAM2	Business Management within Property Agency	30	60	6
A/650/4732	CPAM3	Business Systems in Property Agency	30	60	6
D/650/4841	CPAM4	Business Marketing in Property Agency	30	50	5

## ACHIEVING THE QUALIFICATION

To achieve the **Propertymark Qualifications Level 4 Certificate in Property Agency Management** learners must achieve **all 4 units**.

## ENTRY REQUIREMENTS

There are no formal entry requirements for this qualification. However, Propertymark Qualifications recommends that learners should have relevant skills and experience in the property sector, or specific disciplines within property agency before undertaking this qualification.

Whilst it is not compulsory, a relevant Level 3 (or comparable Level 6 in Scotland) qualification may support the natural progression from property agency to supervisory/management positions.

The following are suitable Level 3 qualifications, offered by Propertymark Qualifications, which a learner may hold prior to undertaking the **Propertymark Qualifications Level 4 Certificate in Property Agency Management** qualification:

Qualification title	Qualification accreditation number
Propertymark Qualifications Level 3 Certificate in Property Agency (Lettings)	610/4199/3
Propertymark Qualifications Level 3 Certificate in Property Agency (Sales)	610/3261/X
Propertymark Qualifications Level 3 Certificate in Property Agency (Commercial)	610/4200/6
Propertymark Qualifications Level 3 Award in Residential Letting & Property Management England & Wales	501/2373/7
Propertymark Qualifications Level 3 Award in Residential Letting & Property Management Northern Ireland	600/0363/7
Propertymark Qualifications Level 3 Award in The Sale of Residential Property England, Wales & Northern Ireland	501/2370/1
Propertymark Qualifications Level 3 Award in Commercial Property Agency England, Wales & Northern Ireland	501/1908/4
Propertymark Qualifications Level 3 Award in Real Property Auctioneering England & Wales	600/0267/0

The following are suitable Level 6 (Scotland) qualifications, offered by Propertymark Qualifications, which a learner may hold prior to undertaking the Level 4 (comparable to Level 7 in Scotland) Propertymark Qualifications Certificate in Property Agency Management qualification:

Qualification title
Propertymark Qualifications Level 6 (SCQF) Certificate in Property Agency (Lettings)
Propertymark Qualifications Level 6 (SCQF) Certificate in Property Agency (Sales)
Propertymark Qualifications Level 6 (SCQF) Award in Residential Letting & Property Management Scotland
Propertymark Qualifications Level 6 (SCQF) Award in Sale of Residential Property Scotland

## REGISTRATION

Learners must be registered for the qualification with the relevant nation and appropriate specialism selected. Accurate and timely registration is essential to ensure that learners receive appropriate support and that examinations are made available. Learners should discuss any questions about registration with their training provider.

## ACCESSIBILITY

Learners who require reasonable adjustments, access arrangements or special consideration should discuss their requirements with their training provider at the earliest opportunity. Recognised centres can find the relevant policies and forms on the Propertymark Qualifications CRM system.

## RECOGNITION OF PRIOR ACHIEVEMENT

Qualifications and units awarded by Propertymark Qualifications and other awarding bodies, where relevant, may be used to gain exemptions from units of qualifications offered by Propertymark Qualifications under certain circumstances. Learners should contact their training provider for further information. Recognised centres can find further information on the Propertymark Qualifications CRM system.

## KNOWLEDGE, UNDERSTANDING AND SKILLS

Assessment Guidance is provided through the descriptions of Knowledge, Understanding and Skills (KUS), to amplify the learning objective and/or assessment criterion as relevant and enable national or industry specific information and requirements to be noted.

Some words are emboldened within the Learning Outcomes and Assessment Criteria. This indicates that there is additional assessment guidance provided on these terms. This guidance is intended to be indicative and not exhaustive.

This guidance is intended to be indicative and not exhaustive. Learners are encouraged to undertake wider reading and research aligned with the assessment criteria to deepen their understanding and fully meet the Learning Outcomes. All assessments are designed in accordance with stated Learning Outcomes and Assessment Criteria.

## ASSESSMENT

Each unit is assessed individually through an online exam. The units can be taken in any order. Learners will be provided with further information on the online assessment system by their training provider. Recognised centres can access supporting documentation for online exams on the PropertyMark Qualifications CRM system.

### CPAM1 has the following assessment methodology

Assessment details	On screen assessment with short-essay style questions.
Assessment Duration	90 minutes
Number of questions	1 scenario with 6 questions
Grading information	Distinction/Pass/Fail
Assessment availability	Published Examination Sessions (Windows) as per Examination Schedule

### CPAM 2 - 4 have the following assessment methodology

Assessment details	On screen assessment with a combination of question styles: such as multiple choice, multiple response, drag and drop, matching, and list style questions.
Assessment Duration	60 minutes for each unit
Number of questions	30 questions for each unit
Grading information	Distinction/Pass/Fail
Assessment availability	Published Examination Sessions (Windows) as per Examination Schedule

## GRADE BOUNDARIES

Grade boundaries are set as follows:

- CPAM1: 45% for a **Pass**, and 60% for a **Distinction**
- CPAM2 – CPAM4: 60% for a **Pass**, and 80% for a **Distinction**

These are notional and are subject to change by Propertymark Qualifications.

## SAMPLE ASSESSMENT MATERIAL

Sample assessments are provided for each unit. These are available on the Propertymark Qualifications CRM system for centres to access and share with learners.

## RESULTS

Learners will receive a result for each individual examination no later than eight weeks after the exam window closes.

## ENQUIRIES ABOUT RESULTS

Propertymark Qualifications make provision for learners and centres to make an enquiry into or appeal against an assessment decision. Learners should discuss this with their training provider. Recognised centres can find policies and forms on the Propertymark Qualifications CRM system.

## CERTIFICATION

Learners wishing to complete the **Propertymark Qualifications Level 4 Certificate in Property Agency Management** are required to pass four units.

Once all four units have been passed, Propertymark Qualifications will provide certification for the full qualification. Candidates who achieve a distinction in all four units will be awarded a distinction for the qualification.

## PROGRESSION

Learners may wish to progress onto wider management qualifications at Level 5 or above following achievement of this qualification or extend their knowledge of the property sector by taking a range of specialism specific qualifications such as those at Level 3 offered by Propertymark Qualifications.

## REPLACEMENT CERTIFICATES

If a certificate has been misplaced, lost, or stolen and a replacement is required, learners will need to complete a Replacement Certificate Request Form.

## QUERIES ABOUT THIS SPECIFICATION

Learners with queries about this specification should contact their training provider. Centre Administrators with queries about this specification should contact Propertymark Qualifications.

# QUALIFICATION UNITS

# COMPLIANCE AND ETHICAL PRACTICES IN PROPERTY AGENCY MANAGEMENT

## Compliance and Ethical Practices in Property Agency Management (CPAM1)

Unit Code	Unit Title	Level	GLH/TQT
CPAM1	Compliance and Ethical Practices in Property Agency Management	4	40/80
<p><b>Description of unit:</b> This unit is about working within the regulatory environment of the property services industry. Most organisations within property services must operate within specific regulations, codes of practice and demonstrate ethical practices. It examines the implications of carrying out a business which has an impact on people and the planet. It considers how legislation and codes of practice can guide business practice.</p>			

Learning Outcome <i>The Learner will:</i>	Assessment Criteria <i>The learner can:</i>	Knowledge, Understanding and Skills (KUS) <i>Indicative content only</i>
<p>1. Understand what is meant by ethics and the relationship between ethics and good practice</p>	<p>1.1 Explain what is meant by <b>ethical practice</b></p> <p>1.2 Identify the ways in which ethical practice can be demonstrated</p> <p>1.3 Explain why a high standard of service is important for promoting trust in a property agency business and the profession</p> <p>1.4 Identify why a <b>fit and proper person</b> test is required</p>	<p><b>Ethical Practice</b></p> <p>The general principles of ethical practice as outlined in:</p> <ul style="list-style-type: none"> <li>• The Property Ombudsman code of practice for sales and lettings.</li> <li>• Propertymark conduct and membership rules.</li> <li>• The RICS rules of conduct</li> <li>• The Scottish and Welsh letting codes of practice</li> <li>• The Financial Conduct Authority (FCA) handbook of rules and guidance</li> <li>• The Regulation of Property Agents (RoPA) report 2019</li> </ul> <p><b>Fit and proper person test</b> as outlined in:</p> <ul style="list-style-type: none"> <li>• Section 66 of the Housing Act 2004 (HMO licence)</li> <li>• Section 20 of the Housing (Wales) Act 2014 (Rent Smart Wales licence)</li> <li>• Section 34 of the Housing (Scotland) Act 2014 and the Letting Agent Code of Practice (Scotland) Regulations 2016 (letting agent registration in Scotland)</li> <li>• Section 60A of the Financial Services and Markets Act 2000 and the Financial Conduct Authority (FCA) authorisation)</li> <li>• Section 26 of the Money Laundering, Terrorist Financing and Transfer of Funds (Information on the Payer) Regulations 2017 and the HMRC Approval Process (anti-money laundering for property agents)</li> <li>• The Company Directors Disqualification Act 1986 (limited company director disqualification)</li> <li>• Section 159A Companies Act 2006</li> <li>• Economic Crime and Corporate Transparency Act 2023</li> <li>• The Insolvency Service</li> </ul>

Compliance and Ethical Practices in Property Agency Management (CPAM1)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
<p>2. Understand the need for financial integrity</p>	<p>2.1 Explain the requirements of registration for undertaking <b>financial activities</b></p> <p>2.2 Identify the requirements for dealing with and <b>protecting clients' money</b></p> <p>2.3 Identify the key elements of a <b>money laundering policy</b></p> <p>2.4 Discuss the options available to protect financial integrity through <b>insurance products</b></p> <p>2.5 Set out the options available to a <b>regulator</b> for breaches of the relevant legislation</p>	<p><b>Financial activities</b></p> <ul style="list-style-type: none"> <li>• Requirements of registration for undertaking financial activities as outlined in Financial Services and Markets Act 2000</li> <li>• Including: <ul style="list-style-type: none"> <li>○ Offering insurance and mortgage products</li> <li>○ Dealing with insurance claims</li> </ul> </li> </ul> <p>Dealing with and <b>protecting clients' money</b> as per:</p> <ul style="list-style-type: none"> <li>• Client Money Protection Schemes for Property Agents (Requirement to Belong to a Scheme etc) Regulations 2019 (For England and Wales)</li> <li>• The general principles outlined in the rules of the government-authorised client money protection schemes  <a href="https://www.gov.uk/client-money-protection-scheme-property-agents">https://www.gov.uk/client-money-protection-scheme-property-agents</a></li> <li>• Letting Agent Code of Practice (Scotland) Regulations 2016 (For Scotland)</li> <li>• Financial Services compensation scheme</li> <li>• Estate Agents Act 1979 (Sections 12 -15)</li> <li>• Estate Agents (Accounts) Regulations 1981</li> <li>• Policies, procedures, risk assessment, control measures must be in writing</li> <li>• The regulations relating to the handling of tenancy deposits</li> </ul> <p>Key elements of a <b>money laundering policy</b> as per:</p> <ul style="list-style-type: none"> <li>• Proceeds of Crime Act 2002</li> <li>• Terrorism Act 2000</li> <li>• Criminal Finances Act 2017</li> <li>• Money Laundering, Terrorist Financing and Transfer of Funds (Information on the Payer) Regulations 2017 (as amended 2019)</li> <li>• Politically Exposed Persons (PEP)</li> <li>• Sanctions and Anti-Money Laundering Act 2018 as amended May 2025 including the role of the Office of Financial Sanctions Implementation (OFSI)</li> </ul> <p><b>Insurance products</b> e.g.</p> <ul style="list-style-type: none"> <li>• Professional indemnity insurance</li> <li>• Public liability insurance</li> </ul>

Compliance and Ethical Practices in Property Agency Management (CPAM1)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<ul style="list-style-type: none"> <li>• Client money protection membership</li> <li>• Employers’ liability insurance</li> <li>• Cyber and data insurance</li> <li>• Business premises and contents insurance</li> <li>• Vehicle Insurance (Business Cover)</li> </ul> <p><b>Regulators</b></p> <ul style="list-style-type: none"> <li>• Financial Conduct Authority (FCA)</li> <li>• National Trading Standards Estate and Letting Agents Team (NTSELAT)</li> <li>• Local Authorities</li> <li>• HMRC</li> </ul>
<p>3. Understand the need for confidentiality</p>	<p>3.1 Explain the common law requirements in relation to confidentiality</p> <p>3.2 Outline the key <b>data protection principles</b></p> <p>3.3 Define what personal data is</p> <p>3.4 Define the roles of data controllers and data processor</p> <p>3.5 Explain security measures taken when handling personal data</p> <p>3.6 Identify the role of the <b>data handling regulator</b></p> <p>3.7 Identify the actions available to the <b>data handling regulator</b> when a breach of the legislation occurs</p>	<p><b>Data protection principles</b> as identified in UK General Data Protection Regulation (GDPR)</p> <ul style="list-style-type: none"> <li>• GDPR: <a href="https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/data-protection-principles/a-guide-to-the-data-protection-principles/">https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/data-protection-principles/a-guide-to-the-data-protection-principles/</a></li> <li>• General Data Protection Regulation and Data (Use and Access) Act 2025</li> <li>• Definitions of personal data, data controllers and data processors as outlined in the UK GGPR</li> <li>• Including: <ul style="list-style-type: none"> <li>o rights of data subjects</li> <li>o how the principles are applied to customers and staff</li> </ul> </li> </ul> <p><b>Data handling regulator</b> being the Information Commissioner’s Office (ICO)</p>

Compliance and Ethical Practices in Property Agency Management (CPAM1)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
<p>4. Understand the importance of treating individuals and the planet with respect</p>	<p>4.1 Outline the principles underlying <b>discrimination legislation</b></p> <p>4.2 Explain the benefits of <b>equality and diversity</b> in the workplace</p> <p>4.3 Demonstrate an understanding of the key <b>environmental issues</b> relating to residential properties</p>	<p><b>Discrimination legislation</b> including:</p> <ul style="list-style-type: none"> <li>• Equality Act 2010 In England, Scotland and Wales</li> <li>• Discrimination legislation in Northern Ireland: <a href="https://www.equalityni.org/Legislation">https://www.equalityni.org/Legislation</a></li> <li>• <i>From 1st May 2026: Renters’ Rights Act 2025</i></li> </ul> <p><b>Equality and diversity</b> supporting the 9 protected characteristics as identified in the Equality Act 2010 (and equivalent in Northern Ireland)</p> <p><b>Environmental issues</b> examples include:</p> <ul style="list-style-type: none"> <li>• Planning</li> <li>• Flooding</li> <li>• Protected flora and fauna</li> <li>• Control of invasive species</li> <li>• Deleterious materials- asbestos, radon</li> <li>• Contamination</li> <li>• Pollution- air, soil, water</li> <li>• Noise</li> <li>• Including signposting customers to the correct advice</li> </ul>
<p>5. Understand the application of the relevant consumer and business protection provisions</p>	<p>5.1 Identify the <b>provisions that protect consumers</b> when dealing with traders</p> <p>5.2 Recognise what and when <b>information</b> must be provided to consumers concerning the available protection</p> <p>5.3 Apply the consumer protection provisions to a range of <b>situations</b> for property agents</p>	<p><b>Provisions that protect consumers</b> as outlined in:</p> <ul style="list-style-type: none"> <li>• Digital Markets, Competition and Consumers Act 2024 (DMCCA) and CMA207 guidance (2025)</li> <li>• Business Protection from Misleading Marketing Regulations 2008</li> <li>• Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013</li> <li>• Consumer Rights Act 2015</li> <li>• Advertising Codes - Advertising Standards Authority (ASA)</li> <li>• Competition and Markets Authority (CMA) -including cartels</li> </ul> <p><b>Information</b></p> <ul style="list-style-type: none"> <li>• Right to cancel and a model cancellation form as per the Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013</li> <li>• Redress scheme information</li> </ul>

Compliance and Ethical Practices in Property Agency Management (CPAM1)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<ul style="list-style-type: none"> <li>• CMP scheme certificates</li> <li>• In-house complaints procedures</li> <li>• Model documentation as provided by membership and regulatory bodies</li> </ul> <p><b>Situations</b> including:</p> <ul style="list-style-type: none"> <li>• where there is a conflict of interest</li> <li>• situations included in guidance on trading standards regulations</li> <li>• misleading actions and omissions (provision of Material Information)</li> <li>• aggressive commercial practices</li> <li>• misleading practices when dealing with other businesses</li> <li>• cooling off periods</li> <li>• unfair contract terms/commercial practices referenced in the Digital Markets, Competition and Consumers Act 2024 (DMCCA) and CMA207 guidance (2025)</li> </ul>
<p>6. Understand the importance of industry standards and codes of practice</p>	<p>6.1 Explain the role of <b>professional bodies'</b> codes of practice and membership rules</p> <p>6.2 Identify the impact on a property agency business of <b>regulatory bodies and licensing authorities'</b> codes.</p> <p>6.3 Outline the <b>rights and responsibilities</b> under a complaints procedure of the consumer and agent</p> <p>6.4 Explain the <b>range of outcomes</b> that may result from a successful consumer complaint or adverse regulatory ruling</p>	<p><b>Professional bodies'</b> codes of practice and membership rules including:</p> <ul style="list-style-type: none"> <li>• Propertymark conduct and membership rules</li> <li>• The RICS rules of conduct</li> </ul> <p><b>Regulatory bodies and licensing authorities</b> including:</p> <ul style="list-style-type: none"> <li>• National Trading Standards Estate and Letting Agency Team (NTSELAT)</li> <li>• National Trading Standards</li> <li>• Rent Smart Wales</li> <li>• Northern Ireland Housing Executive</li> <li>• Letting Agent registration (Scotland)</li> <li>• Local Authorities</li> <li>• Competition and Markets Authority (CMA)</li> </ul> <p><b>Rights and responsibilities</b></p> <p>Complaints handling procedures as set out by</p> <ul style="list-style-type: none"> <li>• The Property Ombudsman</li> <li>• Property Redress Scheme</li> <li>• Professional Bodies such as Propertymark, RICS</li> <li>• The court and tribunal system (in Scotland)</li> </ul>

Compliance and Ethical Practices in Property Agency Management (CPAM1)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<b>Range of outcomes</b> <ul style="list-style-type: none"> <li>• Trading Standards – warnings, prosecutions, fines</li> <li>• NTSELAT – can issue warning or prohibition orders on individuals and companies</li> <li>• Fines, potential imprisonment, rent repayment orders – AML issues, proceeds of crime</li> <li>• Redress schemes- compensatory awards, formal apology, changing procedures</li> <li>• Professional bodies – sanctions including financial penalties, termination of membership</li> </ul>

# BUSINESS MANAGEMENT WITHIN PROPERTY AGENCY

Business Management within Property Agency (CPAM2)

Unit Code	Unit Title	Level	GLH/TQT
CPAM2	Business Management within Property Agency	4	30/60
<p><b>Description of unit:</b> This unit aims to equip learners with a conceptual understanding of how property agency businesses and people are managed. It will enable learners to apply knowledge and understanding within the workplace.</p>			

Learning Outcome <i>The Learner will:</i>	Assessment Criteria <i>The learner can:</i>	Knowledge, Understanding and Skills (KUS) <i>Indicative content only</i>
<p>1. Understand the benefits of effective organisation and planning.</p>	<p>1.1 Describe the purpose, content and use of organisational <b>vision, mission, strategy, and business plans</b></p> <p>1.2 <b>Construct</b> and <b>evaluate</b> organisational objectives against the business’s corporate strategy</p> <p>1.3 Identify the main features, elements and purposes of <b>formal business</b> reporting</p> <p>1.4 Identify how businesses and teams can be <b>structured</b> to meet organisational requirements</p>	<p><b>Organisational vision, mission, strategy and business plans</b></p> <ul style="list-style-type: none"> <li>• A vision statement sets out the organisation’s high level aspirational direction for the future in terms of what it wants to achieve or change</li> <li>• A mission statement summarises the core purpose of the organisation</li> <li>• A strategy sets out the long term direction, pathway and objectives of the organisation with long term strategic goals/outcomes</li> <li>• A business plan provides the detailed operational and financial blueprints of how short-to-medium term goals derived from the strategy will be achieved</li> <li>• How the statements and plans differ in content and use and how they are used together to support organisation development and efficiency</li> </ul> <p><b>Construct</b> organisational objectives</p> <ul style="list-style-type: none"> <li>• An objective setting process that identifies against the business core strategy and organisational objectives</li> <li>• With consideration for PESTLE objectives: Political, Economic, Social, Technological, Legislative, Environmental</li> <li>• Setting SMARTER Objectives: Specific, Measurable, Achievable, Relevant, Timebound, Evaluate, Review</li> <li>• Key Performance Indicators (KPI)</li> </ul> <p><b>Evaluate</b> organisational objectives</p> <ul style="list-style-type: none"> <li>• Revisit and measure if objectives meet with core business values</li> <li>• Performance monitoring and feedback</li> <li>• Review mechanism to re-evaluate corporate strategy and management</li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<p><b>Formal business report</b></p> <ul style="list-style-type: none"> <li>• Used to disseminate key elements of company position</li> <li>• Reports relevant to business needs including financial reporting, reviews of business performance, analysis of impact due to changes in legal or regulatory requirements, outcomes of research (e.g. new business opportunities, customer surveys, competitor analysis)</li> <li>• Elements could include: Title Page, Executive Summary, Purpose/problem, Background, Research methods, Activities, Findings, Implications, Conclusion, Recommendations, Appendices</li> </ul> <p><b>Structures to meet organisational requirements</b></p> <ul style="list-style-type: none"> <li>• Structure that serves the objectives and values of the company</li> <li>• Areas of responsibility and accountability within this structure, taking into consideration strategic, tactical and operational requirements</li> <li>• Measure the effectiveness of performance and accountability</li> <li>• Types of structure:               <ul style="list-style-type: none"> <li>○ Hierarchical/Flat</li> <li>○ Centralised/Decentralised</li> <li>○ Functional</li> <li>○ Regional</li> <li>○ Franchise</li> <li>○ Matrix including span of control</li> </ul> </li> </ul>
<p>2. Understand the definition and functions of leadership and management</p>	<p>2.1 Analyse the four <b>core functions of management</b></p> <p>2.2 Differentiate between the role of a <b>manager</b> and that of a <b>leader</b></p> <p>2.3 Recognise the features of successful <b>team leadership</b></p> <p>2.4 Differentiate between the roles <b>within a team</b></p>	<p><b>Core functions of management</b></p> <ul style="list-style-type: none"> <li>• Plan</li> <li>• Organise</li> <li>• Lead</li> <li>• Control</li> </ul> <p><b>Features of managers</b></p> <ul style="list-style-type: none"> <li>• Delivery of targets and objectives</li> <li>• Underpinned by policy and procedures</li> <li>• Authority based on position</li> </ul>

Business Management within Property Agency (CPAM2)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<p><b>Features of leaders</b></p> <ul style="list-style-type: none"> <li>• Inspires others</li> <li>• Drives change</li> <li>• Builds relationships based on shared vision</li> </ul> <p><b>Team leadership</b></p> <ul style="list-style-type: none"> <li>• Leadership styles – Transformational, Transactional, Democratic, Authoritarian, Laisser-Faire, Situational, Bureaucratic, Charismatic, Servant</li> <li>• McGregor’s Theory X and Theory Y Management</li> <li>• Delegation</li> <li>• Motivation</li> <li>• Communication</li> <li>• Training and developing team members</li> <li>• Emotional intelligence</li> <li>• Motivation Theory                             <ul style="list-style-type: none"> <li>○ Herzberg’s two-factor theory</li> <li>○ Maslow’s hierarchy of needs model</li> </ul> </li> <li>• Types of motivation                             <ul style="list-style-type: none"> <li>○ Extrinsic</li> <li>○ Intrinsic motivation</li> </ul> </li> </ul> <p><b>Roles within a team</b></p> <ul style="list-style-type: none"> <li>• Leader</li> <li>• Facilitator</li> <li>• Mentor</li> <li>• Colleague</li> <li>• Team roles as per Belbin model</li> </ul>
<p>3. Understand and apply the principles of strategic human resource management in a property agency business</p>	<p>3.1 Describe how to promote and manage the <b>wellbeing</b> of individuals within a property agency business</p> <p>3.2 Identify relevant <b>policies</b> to ensure ongoing compliance with legal and regulatory human resource requirements</p>	<p><b>Wellbeing</b></p> <ul style="list-style-type: none"> <li>• Health and safety of the working environment</li> <li>• Security of the working environment</li> <li>• Travelling for work purposes</li> <li>• Mental health</li> <li>• Stress management</li> <li>• Access to counselling and mental health advice</li> </ul>

Business Management within Property Agency (CPAM2)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
	<p>3.3 Evaluate the benefits of <b>human resource</b> policies and planning</p> <p>3.4 Explain the importance of monitoring and <b>performance management and dealing with conflict</b></p> <p>3.5 Understand the <b>process of recruitment, employment and termination</b></p>	<ul style="list-style-type: none"> <li>• Employee Assistance Programme (EAP)</li> <li>• Bullying and harassment policies</li> <li>• Paid and unpaid leave and time-off</li> </ul> <p><b>Policies</b></p> <ul style="list-style-type: none"> <li>• Salaries and minimum wage</li> <li>• IR35</li> <li>• Health and Safety Executive (HSE) requirements including health and safety policy, RIDDOR (reporting of injuries, diseases and dangerous occurrences regulations), First Aid, provision of health and safety related information/poster, assessing and managing risk (risk assessment)</li> <li>• Working Time Regulations 1998 including: what counts as work, place of work, rest breaks, working hours, holiday entitlement</li> <li>• Equality and Diversity</li> </ul> <p><b>Human resource planning</b></p> <ul style="list-style-type: none"> <li>• Policies and procedures underpin organisation-wide approach</li> <li>• Recruitment, retention and succession planning</li> <li>• Impact on organisation resilience</li> <li>• Changes requiring up-skilling or different skill sets</li> </ul> <p><b>Performance management and dealing with conflict</b></p> <ul style="list-style-type: none"> <li>• Appraisals Target setting - SMARTER: <ul style="list-style-type: none"> <li>○ Specific</li> <li>○ Measurable</li> <li>○ Achievable</li> <li>○ Relevant</li> <li>○ Time bound</li> <li>○ Evaluate</li> <li>○ Review</li> </ul> </li> <li>• Recognition and reward</li> <li>• Training and development – Including the <b>ADDIE</b> model: <ul style="list-style-type: none"> <li>○ Analysis</li> <li>○ Design</li> </ul> </li> </ul>

Business Management within Property Agency (CPAM2)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<ul style="list-style-type: none"> <li>○ Development</li> <li>○ Implementation</li> <li>○ Evaluate</li> <li>● Grievance and disciplinary procedures</li> <li>● Workplace mediation</li> </ul> <p><b>Process of recruitment</b></p> <ul style="list-style-type: none"> <li>● Analysing requirements of the role and whether it is necessary prior to recruitment</li> <li>● Job specification and Person specification</li> <li>● Advertising</li> <li>● Interview techniques and interview assessment</li> </ul> <p><b>Process of Employment</b></p> <ul style="list-style-type: none"> <li>● Contract</li> <li>● Codes of Conduct/Staff Handbook/policies and procedures</li> <li>● Induction process</li> <li>● Induction training arrangements</li> <li>● Probationary periods</li> </ul> <p><b>Process of Termination</b></p> <ul style="list-style-type: none"> <li>● Effluxion of time</li> <li>● Redundancy</li> <li>● Notice</li> <li>● Dismissal</li> <li>● Legal requirements</li> </ul>
<p>4. Understand the need for and implementation of risk management within a property agency business</p>	<p>4.1 Describe <b>risk management and crisis management</b></p> <p>4.2 Identify the potential <b>risks</b> to a property agency business</p> <p>4.3 Explain how to develop and implement the processes of <b>risk management</b> in a business</p>	<p><b>Risk management and Crisis Management</b></p> <ul style="list-style-type: none"> <li>● Risk Management as defined by Health and Safety Executive (HSE)</li> <li>● Risk as defined by ISO: the effect of uncertainty on objectives</li> <li>● Risk Management as defined by ISO: coordinated activities to direct and control an organisation with regard to risk</li> <li>● The impact of legal, political and market changes along with other external factors which could be a risk to an agency business</li> </ul>

Business Management within Property Agency (CPAM2)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
	<p>4.4 Assess the <b>consequences</b> of inadequate or absent risk management</p> <p>4.5 Evaluate how <b>risk information</b> can be systematically captured, stored and analysed</p>	<p>Crisis Management:</p> <ul style="list-style-type: none"> <li>• Reactive - dealing with a crisis once it has occurred</li> <li>• Limiting damage and enabling recovery as quickly as possible</li> <li>• Working in uncertainty</li> <li>• Time pressure</li> </ul> <p>Business Continuity:</p> <ul style="list-style-type: none"> <li>• Plans to keep the business operational in a disruption covering elements such as buildings, staff, resources etc</li> <li>• Response plans including strategic plans, operational plans, return to business as usual, communications plans</li> <li>• Disaster Recovery - technical, restoration of IT infrastructure and operations after a crisis or disruption</li> </ul> <p><b>Risks to property agency business</b> which include:</p> <ul style="list-style-type: none"> <li>• Compliance Risk</li> <li>• Financial Risk</li> <li>• Operational Risk</li> <li>• Reputation Risk</li> <li>• Competition Risk</li> <li>• Economic Risk</li> <li>• Security and Fraud Risk</li> </ul> <p><b>Risk management</b> - developing and implementing risk management processes</p> <ul style="list-style-type: none"> <li>• Organisation risk appetite</li> <li>• Steps in the risk management process</li> <li>• Identify - SWOT, PESTLE, emerging threats and risks</li> <li>• Analyse - impact should the risk occur, single points of failure</li> <li>• Prioritise</li> <li>• Treat - considering organisation risk appetite: risk avoidance, risk reduction, risk acceptance, risk transference</li> <li>• Monitor - framework for review and allocation of responsibilities</li> </ul>

Business Management within Property Agency (CPAM2)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<p><b>Consequences of inadequate risk management</b></p> <ul style="list-style-type: none"> <li>• Failure to identify potential risks and their effects</li> <li>• Poor decision-making</li> <li>• Loss of business continuity with subsequent damage to the organisation</li> <li>• Quality and relevance of mitigation strategies - cost-benefit, introduction of different/additional risk</li> </ul> <p><b>Risk information</b> - methods of capturing and reviewing risk</p> <ul style="list-style-type: none"> <li>• Capturing information – regular reviews of risk information, discussion at key meetings (e.g. board/senior manager meetings), embedding review of risk in key activities such as financial decisions, new project activity</li> <li>• Risk Register</li> <li>• RAG (Red, Amber, Green) Rating</li> </ul>

# BUSINESS SYSTEMS IN PROPERTY AGENCY

Business Systems in Property Agency (CPAM3)

Unit Code	Unit Title	Level	GLH/TQT
CPAM3	Business Systems in Property Agency	4	30/60
<p><b>Description of unit:</b> This unit is about managing information, knowledge, and communication systems. The aim of the unit is to understand how to implement, manage, and monitor the performance of a property agency business through robust systems and processes for financial and business information.</p>			

Learning Outcome <i>The Learner will:</i>	Assessment Criteria <i>The learner can:</i>	Knowledge, Understanding and Skills (KUS) <i>Indicative content only</i>
<p>1. Understand the provisions of the statutory framework for financial accounting</p>	<p>1.1 Evaluate the different types of <b>business structure</b> that can be used to operate a property agency</p> <p>1.2 Identify the <b>main elements of financial statements</b> and their uses</p> <p>1.3 Identify the <b>financial management roles</b> which may be present within a property agency business</p> <p>1.4 Demonstrate an understanding of the <b>statutory reporting requirements</b> for different types of business structure</p>	<p><b>Business structure including</b></p> <ul style="list-style-type: none"> <li>• Sole trader</li> <li>• Partnership</li> <li>• Limited Liability Partnership (LLP)</li> <li>• Limited company (Ltd or PLC)</li> <li>• Legal status, taxation, liability, administration, regulatory requirements, raising funds, public perception</li> </ul> <p><b>Main elements of financial statements</b></p> <ul style="list-style-type: none"> <li>• Profit and loss account</li> <li>• Balance sheet</li> <li>• Cashflow statement</li> </ul> <p><b>Financial management roles</b></p> <ul style="list-style-type: none"> <li>• Business Owner</li> <li>• Chief Executive Officer (CEO)</li> <li>• Financial Director (CFO)</li> <li>• Chief Operating Officer (COO)</li> <li>• Principles, Partners and Directors (PPD's)</li> <li>• Office or Finance Manager</li> <li>• Accountant/Bookkeeper (either inhouse or external)</li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<p><b>Statutory Reporting Requirements</b></p> <ul style="list-style-type: none"> <li>• Requirements for Statutory Audit</li> <li>• Understand the relevant timeframes and how to prepare and file the following:</li> </ul> <p><u>HMRC</u></p> <ul style="list-style-type: none"> <li>• Company Tax Return</li> <li>• VAT Return</li> <li>• PAYE Return (I.e., Income Tax)</li> <li>• Self-Assessment</li> </ul> <p><u>Companies House</u></p> <ul style="list-style-type: none"> <li>• Confirmation Statement</li> <li>• Annual Accounts (including the different reporting requirements for dormant, micro entities, small, medium and large companies)</li> <li>• Changes to directors, people with significant control, company secretaries, registered office address, or business contact details</li> </ul>
<p>2. Understand the principles of financial management including budgeting and forecasting</p>	<p>2.1 Recognise the <b>records, policies and procedures</b> needed to meet financial management requirements</p> <p>2.2 Identify the components required to support the <b>preparation of management accounts</b></p> <p>2.3 Review the budgets in response to <b>variance analysis</b> and propose revisions to them if necessary</p> <p>2.4 Examine the <b>features of the budgeting process</b> within the property agency</p> <p>2.5 <b>Identify the key financial ratios</b> and demonstrate how to use them</p> <p>2.6 Evaluate <b>options available for financing</b> a property agency business</p>	<p><b>Records, policies and procedures</b></p> <ul style="list-style-type: none"> <li>• To support setting up of accounts system and software</li> <li>• To support financial reporting</li> <li>• Different types of bank accounts required for property agency</li> <li>• Recognise the difference which may be required by different types of business e.g. sole trader, Limited Company etc.</li> </ul> <p><b>Preparation of management accounts</b></p> <ul style="list-style-type: none"> <li>• Reconciliation of all accounts</li> <li>• Profit and loss account</li> <li>• Balance sheet</li> <li>• Cash flow statement</li> <li>• the differences between preparing financial and management accounts (frequency, format, users, purpose)</li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<p><b>Variance analysis</b></p> <ul style="list-style-type: none"> <li>• Income and expenditure</li> <li>• Cash flow</li> </ul> <p><b>Features of the budgeting process</b></p> <ul style="list-style-type: none"> <li>• Forecasting income (based on previous trends, seasonal variations, changes to operations, macroeconomic factors etc)</li> <li>• Forecasting costs (fixed costs and overheads, variable costs, one-off capital costs)</li> <li>• Forecasting profit and loss</li> <li>• Forecasting cash flow</li> </ul> <p><b>Financial ratios</b></p> <ul style="list-style-type: none"> <li>• Profitability (gross profit margin, net profit margin, return on capital employed)</li> <li>• Liquidity (current ratio, i.e., working capital ratio)</li> <li>• Efficiency (collection period ratio i.e. the debtors collection ratio or debtors days ratio)</li> </ul> <p><b>Options available for financing</b></p> <ul style="list-style-type: none"> <li>• Retained earnings</li> <li>• Debt financing (bank overdraft, bank loan, credit cards, asset finance, invoice factoring, personal loans, Government-backed loans)</li> <li>• Equity financing (personal cash injection, new shareholders, angel investors, crowdfunding, venture capitalists, AIM listing, stock market listing, merger and acquisition)</li> <li>• Personal and informal sources: personal savings, family and friends, Directors loan</li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
<p>3. Understand the principles of Information Technology (IT) policies and practices</p>	<p>3.1 Assess the property agency business requirement for <b>IT systems</b></p> <p>3.2 Identify the components of an <b>IT user</b> and <b>social media</b> policy</p> <p>3.3 Describe the purpose and key issues of an <b>IT risk assessment</b></p> <p>3.4 Explain the importance of maintaining security and <b>integrity of data</b></p> <p>3.5 Assess a range of <b>methods of managing software, firmware and hardware</b></p>	<p><b>IT systems</b></p> <p>Including typical requirements of:</p> <ul style="list-style-type: none"> <li>• CRM system - bespoke or off the shelf systems and scalability</li> <li>• IT support - Internal or external</li> <li>• Cyber security</li> <li>• Digital presence - social media, website</li> <li>• Data protection</li> </ul> <p><b>IT User Policy</b> covering:</p> <ul style="list-style-type: none"> <li>• Acceptable use of IT resources</li> <li>• Handling of confidential data</li> <li>• Network access procedures</li> <li>• Appropriate use of email</li> <li>• Password control measures</li> <li>• Physical security of IT devices</li> <li>• Hardware and software management</li> <li>• Incident response guidelines</li> <li>• Staff roles and responsibilities</li> </ul> <p><b>Social Media policy</b> covering:</p> <ul style="list-style-type: none"> <li>• Employee access</li> <li>• Use of official business accounts</li> <li>• Personal use of social media</li> <li>• Conduct and enforcement</li> <li>• Security</li> <li>• Disclaimers</li> <li>• Engagement</li> </ul> <p><b>IT risk assessment</b> to identify, assess and control IT risks such as:</p> <ul style="list-style-type: none"> <li>• Online risks such as hacking, viruses, malware</li> <li>• Physical risks such as theft or damage to devices</li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<ul style="list-style-type: none"> <li>• Technical risks such as software bugs, corrupt hard drives</li> <li>• Human error risks such as accidental deletion of data</li> </ul> <p><b>Integrity of data</b></p> <ul style="list-style-type: none"> <li>• Cyber crime</li> <li>• Online threats to personal data including:</li> <li>• Viruses</li> <li>• Worms</li> <li>• Trojan horses</li> <li>• Adware, spyware and ransomware</li> <li>• Phishing and smishing</li> <li>• Data or information relating to client money</li> <li>• Key data protection principles of General Data Protection Regulation (GDPR) and General Data Protection Regulation and Data (Use and Access) Act 2025: lawfulness, fairness, and transparency, purpose limitation, storage limitation, data minimisation, accuracy, integrity and confidentiality, accountability</li> <li>• Potential harm or financial loss to clients</li> <li>• Damage to business reputation and operation</li> <li>• ICO enforcement action: assessment notices, warning, reprimands, enforcement notices, penalty notices (fines), criminal prosecution</li> <li>• Redress scheme action: compensatory awards</li> </ul> <p><b>Methods of managing software and hardware</b></p> <p><b>Software including:</b></p> <ul style="list-style-type: none"> <li>• Internet browsers</li> <li>• Operating systems (OS)</li> <li>• Antivirus</li> <li>• Firmware</li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<b>Hardware including understanding of differences between:</b> <ul style="list-style-type: none"> <li>• Input devices</li> <li>• Processing devices</li> <li>• Output devices</li> <li>• Storage devices</li> <li>• Communication devices</li> <li>•</li> </ul>
<p>4. Understand the requirements for and impact of recording and retaining business information</p>	<p>4.1 Describe the <b>records</b> a property agency business must keep</p> <p>4.2 Identify the impact record keeping has on <b>resources</b></p> <p>4.3 Describe the main <b>principles of record management</b></p> <p>4.4 Identify <b>key concepts in organisational record keeping</b></p>	<b>Records</b> <ul style="list-style-type: none"> <li>• Financial, legal and compliance records for all types of business structure such as: <ul style="list-style-type: none"> <li>○ Company records</li> <li>○ Accounting records</li> <li>○ PAYE records</li> <li>○ HR records</li> <li>○ Transaction records</li> <li>○ HMRC- records of customer due diligence for AML checks</li> <li>○ Privacy policies</li> </ul> </li> <li>• Records if self-employed (i.e., sole trader or partnerships) <ul style="list-style-type: none"> <li>Accounting records: <ul style="list-style-type: none"> <li>○ all sales and income</li> <li>○ all business expenses</li> <li>○ records of personal income</li> <li>○ any grants obtained through the Self-Employed Income Support Scheme</li> <li>○ different requirements based on use of cash-basis or traditional accounting</li> <li>○ the duration for which records must be retained</li> </ul> </li> </ul> </li> <li>• Records if limited company <ul style="list-style-type: none"> <li>Company records: <ul style="list-style-type: none"> <li>○ directors, shareholders and company secretaries</li> <li>○ the results of any shareholder votes and resolutions</li> </ul> </li> </ul> </li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<ul style="list-style-type: none"> <li>○ promises for the company to repay loans at a specific date in the future ('debentures') and who they must be paid back to</li> <li>○ promises the company makes for payments if something goes wrong and it's the company's fault ('indemnities')</li> <li>○ transactions when someone buys shares in the company</li> <li>○ loans or mortgages secured against the company's assets</li> <li>○ Register of people with 'significant control' (PSC)</li> </ul> <p>Accounting records:</p> <ul style="list-style-type: none"> <li>○ all money received and spent by the company, including grants and payments from coronavirus (COVID-19) support schemes</li> <li>○ details of assets owned by the company</li> <li>○ debts the company owes or is owed</li> <li>○ stock the company owns at the end of the financial year</li> <li>○ the stocktaking you used to work out the stock figure</li> <li>○ all goods bought and sold</li> <li>○ who goods were bought and sold to and from</li> <li>○ the duration for which records must be retained</li> </ul> <p><b>Resources</b></p> <p>Impact of record keeping on resources:</p> <ul style="list-style-type: none"> <li>● People- manage records inhouse or outsource</li> <li>● Materials- equipment required such as computers and office space</li> <li>● Time- required to manage records</li> <li>● Finance- cost of maintaining records</li> </ul>

Business Systems in Property Agency (CPAM3)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<p><b>Principles of record management</b></p> <ul style="list-style-type: none"> <li>• Authentic</li> <li>• Accurate</li> <li>• Accessible</li> <li>• Complete</li> <li>• Comprehensive</li> <li>• Compliant</li> <li>• Effective</li> <li>• Secure</li> </ul> <p><b>Concepts in organisational record keeping</b></p> <ul style="list-style-type: none"> <li>• Creation</li> <li>• Capture</li> <li>• Management</li> </ul>

# BUSINESS MARKETING IN PROPERTY AGENCY

Business Marketing in Property Agency (CPAM4)

Unit Code	Unit Title	Level	GLH/TQT
CPAM4	Business Marketing in Property Agency	4	30/50
<p><b>Description of unit:</b> This unit develops knowledge required to effectively and positively market property agency businesses to customers by understanding and applying a range of marketing tools and strategies to maximise market share and brand recognition.</p>			

Learning Outcome <i>The Learner will:</i>	Assessment Criteria <i>The learner can:</i>	Knowledge, Understanding and Skills (KUS) <i>Indicative content only</i>
<p>1. Understand and apply marketing tools and strategies</p>	<p>1.1 Explain the differences between <b>strategic and tactical marketing</b></p> <p>1.2 Analyse the elements of the <b>marketing mix</b></p> <p>1.3 Analyse the features of <b>marketing communications</b></p> <p>1.4 Identify the need for <b>SMARTER marketing objectives</b></p> <p>1.5 <b>Evaluate the needs of the property agency business</b> when planning a marketing strategy</p>	<p><b>Strategic and tactical marketing:</b> To include consideration of General Data Protection Regulation (GDPR) and General Data Protection Regulation and Data (Use and Access) Act 2025 throughout strategic and tactical marketing</p> <p><b>Strategic marketing</b> Use of marketing disciplines to achieve organisational goals by developing and maintaining a sustainable competitive advantage through use of:</p> <ul style="list-style-type: none"> <li>• Cause Marketing</li> <li>• Relationship Marketing</li> <li>• Scarcity Marketing</li> <li>• Undercover Marketing</li> </ul> <p><b>Tactical marketing</b> Action driven and applicable marketing strategy that companies use to improve their marketing process including:</p> <ul style="list-style-type: none"> <li>• lead generation</li> <li>• placing advertisements</li> <li>• building websites</li> <li>• creating brochures</li> <li>• mailings and implementing a follow-up system</li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<p><b>Marketing mix - 4 P's</b></p> <ul style="list-style-type: none"> <li>• Product</li> <li>• Price</li> <li>• Promotion</li> <li>• Place</li> </ul> <p><b>AIDA model (Attention, Interest, Desire, Action):</b> to support understanding of how marketing activity drives customer engagement and action.</p> <p><b>Marketing communications – 4 C's</b></p> <ul style="list-style-type: none"> <li>• Clarity</li> <li>• Credibility</li> <li>• Consistency</li> <li>• Competitiveness</li> </ul> <p>Including platform examples such as Facebook (e.g. Facebook Business Suite, Instagram Ads Manager) when analysing communication strategies in social media marketing.</p> <p><b>Features of social media pages:</b></p> <ul style="list-style-type: none"> <li>• Bio link</li> <li>• Keywords</li> <li>• Hashtags</li> </ul> <p><b>SMARTER marketing objectives</b></p> <ul style="list-style-type: none"> <li>• Specific</li> <li>• Measurable</li> <li>• Attainable</li> <li>• Realistic</li> <li>• Trackable/Time bound</li> <li>• Evaluate</li> <li>• Review</li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<p><b>Evaluate the needs of property agency business</b>                      Including consideration of General Data Protection Regulation (GDPR) and General Data Protection Regulation and Data (Use and Access) Act 2025 principles:</p> <ul style="list-style-type: none"> <li>• SWOT analysis                             <ul style="list-style-type: none"> <li>○ Strength</li> <li>○ Weaknesses</li> <li>○ Opportunities</li> <li>○ Threats</li> </ul> </li> <li>• PESTLE Analysis                             <ul style="list-style-type: none"> <li>○ Political</li> <li>○ Economic</li> <li>○ Social</li> <li>○ Technological</li> <li>○ Legal</li> <li>○ Environmental</li> </ul> </li> <li>• VUCA                             <ul style="list-style-type: none"> <li>○ Volatility</li> <li>○ Uncertainty</li> <li>○ Complexity</li> <li>○ Ambiguity</li> </ul> </li> </ul>
<p>2. Understand and apply a range of methods for marketing a property agency business effectively</p>	<p>2.1 Describe the target market and elements of a marketing plan                      2.2 Evaluate the use of <b>social media</b> in marketing the business                      2.3 Evaluate the use of <b>property technology</b> (Prop Tech)                      2.4 Determine where <b>classical marketing methods</b> may be more appropriate                      2.5 Determine ways to manage a <b>digital presence</b>                      2.6 Define relevant internal and external data to determine activity and decision making</p>	<p><b>Social media</b> – methods for marketing including:</p> <ul style="list-style-type: none"> <li>• current social media platforms (such as Facebook, Instagram)</li> <li>• setting up appropriate accounts</li> <li>• developing process and procedure documentation</li> <li>• use of account management and ad accounts</li> <li>• support from the social media provider</li> <li>• what social media pages should look like</li> <li>• what content to post</li> <li>• when to post</li> <li>• how much content</li> <li>• social media algorithms</li> <li>• social media trends</li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<ul style="list-style-type: none"> <li>• legislation such as Digital Markets, Competition and Consumers Act 2024 (DMCCA)</li> <li>• consideration of target audience segmentation using demographics, geographics, psychographics and behavioural factors</li> <li>• terminology including total reach, organic reach, paid reach, and impressions</li> </ul> <p>use of social media platforms for structured marketing campaigns</p> <p><b>Property technology</b> – evolving marketing landscapes including:</p> <ul style="list-style-type: none"> <li>• buying and selling or renting platforms</li> <li>• data handling platforms</li> <li>• having an accessible website from desktop or mobile devices</li> <li>• mobile Apps</li> <li>• use of Remote meeting platforms</li> <li>• digital office diaries and planning tools</li> <li>• digital mailing tools</li> <li>• Customer Relationship Management (CRM) database</li> <li>• how to build, use and protect the <b>CRM</b> to achieve best operational outcomes such as:                             <ul style="list-style-type: none"> <li>○ compliance with General Data Protection Regulation (GDPR) and General Data Protection Regulation and Data (Use and Access) Act 2025</li> <li>○ opt in or out of communication types and updates</li> <li>○ ensure customer information is updated</li> <li>○ customer purchasing history for upselling opportunities</li> <li>○ automate processes</li> <li>○ learnings from historical data analysis</li> <li>○ integration of CRM with other business-based software</li> </ul> </li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<ul style="list-style-type: none"> <li>○ the benefits of CRM support- training and buy in from all users</li> <li>● Online valuation tools                             <ul style="list-style-type: none"> <li>○ understanding which ones to use and how to use them effectively</li> </ul> </li> <li>● Use of emerging technologies such as Virtual Reality (VR) for immersive property tours and Artificial Intelligence (AI) for personalised marketing automation and furnishing empty spaces for example</li> </ul> <p><b>Traditional advertising - Classical marketing methods</b> and how to be different from your competitors, including use of the following:</p> <ul style="list-style-type: none"> <li>● Leaflets</li> <li>● Magazines and publications</li> <li>● Newspapers</li> <li>● Banners</li> <li>● Radio</li> <li>● Case studies</li> <li>● Testimonials</li> <li>● Letters</li> </ul> <p><b>Digital presence</b></p> <ul style="list-style-type: none"> <li>● Search Engine Optimisation</li> <li>● Email marketing – having a marketing plan for clients</li> <li>● Property agency website</li> <li>● Ensuring:                             <ul style="list-style-type: none"> <li>○ ease of access for customers using desktop and mobile devices</li> <li>○ unique content</li> <li>○ sale and Influence- social proof, reciprocity, authority building</li> <li>○ how to build perceived value</li> </ul> </li> <li>● Personal branding:                             <ul style="list-style-type: none"> <li>○ how to build personal brand as well as company brand e.g. LinkedIn</li> </ul> </li> </ul>

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
<p>3. Understand the value of establishing and maintaining a property agency brand</p>	<p>3.1 Describe what <b>brand protection</b> is                      3.2 Describe what <b>brand abuse</b> entails                      3.3 Recognise the role of <b>brand protecting services</b>                      3.4 Evaluate the consequence of <b>counterfeiting</b> for a brand                      3.5 Identify the benefits and disbenefits of rebranding                      3.6 Explain how to <b>manage an agency’s reputation</b></p>	<p><b>Brand protection including:</b></p> <ul style="list-style-type: none"> <li>• Promotion</li> <li>• Monitoring</li> <li>• Acquisition of content</li> <li>• Intellectual Property rights</li> <li>• Brand Protection Tools                             <ul style="list-style-type: none"> <li>○ Anti-counterfeiting tools</li> <li>○ Reputation Management service</li> <li>○ Plagiarism detection tools</li> </ul> </li> <li>• Digital Marketing Compliance                             <ul style="list-style-type: none"> <li>○ AI-driven marketing tools</li> <li>○ Advanced CRM systems</li> </ul> </li> </ul> <p><b>Brand abuse</b></p> <ul style="list-style-type: none"> <li>• Counterfeiting</li> <li>• Rogue websites</li> <li>• Copyright piracy</li> <li>• Trademark squatting</li> <li>• Patent theft</li> <li>• Social media impersonation</li> </ul> <p><b>Brand protecting services including:</b></p> <ul style="list-style-type: none"> <li>• Detection</li> <li>• Validation</li> <li>• Enforcement</li> <li>• Reporting</li> </ul> <p><b>Counterfeiting</b></p> <ul style="list-style-type: none"> <li>• Recognising the various forms of counterfeiting in the property industry, including copying of marketing materials, trademark infringement, and website content imitation</li> <li>• Consequences of counterfeiting:                             <ul style="list-style-type: none"> <li>○ Legal consequences</li> </ul> </li> </ul>

Business Marketing in Property Agency (CPAM4)

<b>Learning Outcome</b> <i>The Learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, Understanding and Skills (KUS)</b> <i>Indicative content only</i>
		<ul style="list-style-type: none"> <li>○ Reputational Damage</li> <li>○ Financial Loss</li> </ul> <p>How to <b>manage an agency's reputation</b></p> <p><b>Reputation management</b> with use of:</p> <ul style="list-style-type: none"> <li>• customer engagement and surveys</li> <li>• customer service</li> <li>• online review platforms including:                             <ul style="list-style-type: none"> <li>○ set up of accounts</li> <li>○ staff allocation</li> <li>○ training</li> <li>○ management</li> <li>○ development of process and procedure documentation</li> <li>○ Promotion to clients at specific touch points</li> </ul> </li> </ul>

## KNOWLEDGE, UNDERSTANDING AND SKILLS (KUS) UPDATES

The guidance was last updated as of January 2026.

Unit	Learning Outcome	Update	Version
Compliance and Ethical Practices in Property Agency Management (CPAM1)	2-6	<b>Assessment Guidance Updates:</b> <ul style="list-style-type: none"> <li>• 2.3 money laundering policy</li> <li>• 3.2 key data protection principles</li> <li>• 4.1 discrimination legislation – Renters Rights Act 2025</li> <li>• 5.1 Digital Markets, Competition and Consumers Act 2024</li> <li>• 5.3 range of situations</li> <li>• 6.2 regulatory bodies and licensing authorities</li> <li>• 6.3 examples of Professional Bodies</li> </ul>	v2 Jan 2026
Business Management within Property Agency (CPAM2)	1-4	<ul style="list-style-type: none"> <li>• 1.1 vision, mission, strategy, and business plans</li> <li>• 1.3 formal business report</li> <li>• 1.4 structures to meet organisational requirements</li> <li>• 2.2 manager and leader</li> <li>• 2.3 team leadership – leadership styles</li> <li>• 3.1 wellbeing</li> <li>• 3.2 policies</li> <li>• 4.1 risk management and crisis management</li> <li>• 4.5 risk information</li> </ul>	v2 Jan 2026
Business Systems in Property Agency (CPAM3)	1-3	<ul style="list-style-type: none"> <li>• 1.1 business structure</li> <li>• 2.1 records, policies and procedures</li> <li>• 2.6 options available for financing</li> <li>• 3.4 integrity of data</li> </ul>	v2 Jan 2026
Business Marketing in Property Agency (CPAM4)	1-2	<ul style="list-style-type: none"> <li>• 1.1 strategic and tactical marketing</li> <li>• 1.2 marketing mix – AIDA</li> <li>• 1.3 marketing communications</li> <li>• 1.5 needs of a property agency when planning a marketing strategy</li> <li>• 2.2 social media</li> <li>• 2.3 property technology</li> </ul>	v2 Jan 2026